

DUNHAM HILL and HAPSFORD PARISH COUNCIL MEETING

DATA RETENTION POLICY

The Parish Council recognises that the efficient management of its records is necessary to comply with its legal and regulatory obligations and to contribute to the effective overall management of the Parish Council.

This document provides the policy framework through which this effective management can be achieved and audited.

This policy applies to all records created, received or maintained by the Parish Council in the course of carrying out its functions. Records are defined as all those documents which facilitate the business carried out by the Parish Council and which are thereafter retained (for a set period) to provide evidence of its transactions or activities. These records may be created, received or maintained in hard copy or electronically.

A small percentage of the Parish Council's records will be selected for permanent preservation as part of the Council's archives and for historical research.

Responsibilities

The Parish Council has a corporate responsibility to maintain its records and record management systems in accordance with the regulatory environment. The person with overall responsibility for the implementation of this policy is the Clerk to the Parish Council, and she is required to manage the Council's records in such a way as to promote compliance with this policy so that information will be retrieved easily, appropriately and in a timely manner.

This is also referred to as the data Controller in GDPR regulations introduced in May 2018.

Retention Schedule

Under the Freedom of Information Act 2000, the Parish Council is required to maintain a retention schedule listing the records series which it creates in the course of its business. The retention schedule lays down the length of time which the record needs to be retained and the action which should be taken when it is of no further administrative use.

The Clerk is expected to manage the current record keeping systems using the retention schedule and to take account of the different retention periods when creating new records keeping systems. This retention schedule refers to record series regardless of the media in which they are stored.

Retention of Official Documents

Document	Minimum Retention	Reason
Minutes Books	Indefinite	Archive
Annual Accounts	Indefinite	Archive
Annual Return	Indefinite	Archive
Bank Statements	7 years	Audit/Management
Cheque Book Subs	Last Completed Audit	Management
Paying In Books	Last Completed Audit	Management
Quotes	7 years	Audit
Paid Invoices	7 years	Audit/VAT

VAT Records	7 years	Audit/VAT
Salary Records	7 years	Audit
Tax & NI Records	7 years	Audit
Insurance Policies	Whilst Valid	Audit
Certificate of Employers Liability	40 years	Audit
Certificate of Public Liability	40 years	Audit
Assets Register	Indefinite	Audit
Deeds and Leases	Indefinite	Audit
Copies of bills to hire	7 years	Management/Audit
Declarations of Acceptance	Terms of Office	Management
Members Register of Interests	Terms of Office	Management
Official Complaints	1 Year	Management

Retention of Other Documents

Document	Minimum Retention	Reason
General Information from Cheshire West and Chester Council (CWaC)	1 Month	Management
CWaC Consultations Documents	Consultation period + 1 month	Management
General Information from other Organisations including Cheshire Association of Local Councils (CHALC)	3 months	Management
Routine Correspondence & Emails	1 month	Management

Disposal Procedures

All documents that are no longer required for administrative reasons will be safely disposed of.

Hard Copies (Paper Copies): Shredded

Digital Copies: Deleted from the Hard Drive on the Parish Council Computer

Planning Applications

All planning applications and relevant decision notices are available at the Cheshire West and Chester (CWaC) Planning Portal (<https://pa.cheshirewestandchester.gov.uk/online-applications/>) Any Parish Council recommendations (support, object or observations) in connection with these applications are recorded in the Councils minutes, which are retained indefinitely.

Adopted: July 2022
Reviewed: May 2023
Reviewed: May 2024
Reviewed: May 2025
Reviewed: May 2026
Next Review Date: May 2027