



# MEDSTSEAD PARISH COUNCIL

## DATA RETENTION POLICY

### 1. Introduction

Medstead 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 Council.

This policy applies to all records created, received, or maintained by the Council while carrying out its functions. Records are defined as all those documents which facilitate the business carried out by the Council and which 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 and/or electronically.

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

### 2. Responsibilities

Medstead 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 Council, and the Clerk is required to manage the Council's records in such a way as to promote compliance.

### 3. Retention Schedule

Under the Freedom of Information Act 2000, the Council is required to maintain a retention schedule outlining how long they hold different types of records and what actions are taken when they are no longer needed. The retention schedule lays down the length of time which the record or document needs to be retained and the action which should be taken when it is of no further administrative use ensuring full compliance with the Data Protection Act 2018, which came into force on 25 May 2018 which gives effect to UK law to the UK General Data Protection Regulations (UK GDPR).

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

#### RETENTION SCHEDULE

| Records/Documents     | Minimum Retention Period                     | Reason                      |
|-----------------------|--|-----------------------------|
| <b>Administration</b> |  |                             |
| Minute Books          | Indefinite                                   | Archive                     |
| Meeting documents     | Until there is no administrative requirement | Operational/Common Practice |

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|--|--|--|
| Councillor documents e.g. Declarations of Acceptance of Office, Code of Conduct, DPI's   | 1 year after vacating office                 | Operational  |
| Trusts, Title Deeds, Conveyances   | Indefinite                                   | Archive / audit management                                     |
| Leases, agreements, contracts, wayleaves   | Indefinite                                   | Archive / audit management                                     |
| Scale of fees and charges  | 6 years                                      | Management   |
| Correspondence - general   | Until there is no administrative requirement | Operational  |
| Complaints, FOI's/SAR's  | 6 years after resolution                     | Operational  |
| <b>Allotments</b>  |  |  |
| Register and Plans   | Indefinitely                                 | Audit / management   |
| Rental agreements  | Whilst valid                                 | Operational  |
| <b>Cemetery</b>  |  |  |
| Register of fees collected, register of burials, register of purchased graves, register/plan of grave spaces, register of memorials, applications for interment, applications for right to erect memorials, disposal certificates, and copy certificates of grant of exclusive right of burial | Indefinite                                   | Archives and Local Authorities Cemeteries Order 1977 (SI. 204) |
| <b>Recreation Grounds, Sports Pavilion and Community Room</b>  |  |  |
| Applications to hire, lettings diaries, copies of bills to hirers  | 6 years                                      | VAT / management   |
| <b>Financial</b>   |  |  |
| Annual Returns /Accounts   | Indefinite                                   | Audit  |
| Bank Statements, paying in, cheque books   | Last completed audit year                    | Audit  |
| Paid invoices  | 6 years                                      | VAT  |

|   |  |  |
|---|--|--|
| Paid cheques  | 6 years  | Limitation Act 1980<br>(as amended)    |
| VAT claims/records  | 6 years (20 years for VAT on rents)                    | VAT / audit / legal                    |
| Receipt/cash books/petty cash   | 6 years  | VAT / Limitation Act 1980 (as amended) |
| Quotations and Tenders  | 6 years  | Limitation Act 1980<br>(as amended)    |
| Investments   | Indefinite   | Audit / management                     |
| Asset Register  | Indefinite   | Audit / management                     |
| Insurance policies  | Whilst valid   | Audit / management                     |
| Certificates for insurance against liability for employees/employers          | Indefinitely   | Future claims                          |
| Members allowance register (if applicable)                                    | 6 years  | Tax, Limitation Act 1980               |
| <b>Personnel</b>  |  |  |
| Salary records, payslips, wages books   | 12 years   | Superannuation                         |
| Timesheets  | 3 years  | Audit                                  |
| PAYE/NI records   | 6 years  | Audit / legal                          |
| <b>Historical /Local Information</b>  |  |  |
| Village Plans/Projects  | Until there is no longer an administrative requirement | Operational                            |
| Any maps or historical documents including Rights of Way                      | Indefinitely   | Archive / historical                   |
| Local and other publications  | Until there is no longer an administrative requirement | Operational                            |
| Any historical documents pre-dating the parish council or not council related | Indefinitely   | Archive / historical                   |
| Council owned publications, press cuttings, photographs                       | Indefinitely   | Archive / historical                   |

## Version Control

| Version                    | Date adopted                                | Minute ref. |
|----------------------------|---|-------------|
| Data Retention Policy 2026 | First adopted 22 <sup>nd</sup> January 2026 | 26.103      |