



DATA RETENTION POLICY

INTRODUCTION

Granborough Parish Council is required to maintain a record of its proceedings, decisions and actions. This information is contained in the documents and records which the Parish Clerk and the Councillors use when undertaking Parish Council Business. The majority of this material is public and available for inspection and is also required for audit purposes, personnel records and the possibility of legal proceedings. It is not practicable to retain all documentation as; the majority will not contain key information about decisions and actions, and will therefore be destroyed. The National Association of Local Councils (NALC) has provided a general list of documentation/records and recommend retention periods as maybe required by law, general convention or by the Council's need. This is included as Annex A. This Policy supplements the NALC guidance.

OVERVIEW

Documents held by Granborough Parish Council are mostly in electronic form including emails and Office documents, though some paper files are retained where required, such as finance folders and the Minute books. Both paper and electronic documents are covered by this policy.

Documents and emails will only be retained in accordance with this document or the NALC Guidelines in Annex A. Once past the retention date, paper documents will be shredded and recycled whilst electronic documents will be deleted.

ELECTRONIC STORAGE

All electronic documents and emails will be held remotely via office 365 on a Business Onedrive, which was chosen for its GDPR compliant security credentials. Access is via the Clerk and is password protected.

SHARING

It is necessary for the Clerk to share information with the Councillors in order that they can address Parish Council Business. All Councillors have agreed to comply with the Councillors Briefing, and will ensure no individual's personal data obtained from the Parish Council, will be stored on their own electronic devices or kept in hard copy. Copies of publicly available reports and papers, may be held as required.

COUNCIL DOCUMENTATION

Whilst the Parish Council is a permanent organisation, the Members change on a regular basis. It is important that learning and knowledge is not lost due to a lack of historical information. Some documentation is therefore kept to enable new Members to discharge the Parish Council's functions, with continuity and efficiency.

Other documentation is kept as reference material for the Clerk. This will include anything originally created or researched, which may be used again in the future including SLCC Advice, Notices, Legal information and templates for administration purposes.

AUDIT

An information audit was conducted in March 2018, and unnecessary documentation was removed, but useful information has been preserved by creating several key spreadsheets;

- Maintenance Spreadsheet; recording all Parish Council assets and street furniture for which the Parish Council has responsibility. The spreadsheet lists maintenance of each item, the year in which it was carried out and the contractor responsible for the work. One tab covers street furniture whilst a second tab covers the playground equipment.
- Lamp Fault Reporting; listing each streetlight individually along with the dates of any faults occurring.
- Councillor List; listing every Councillor who has been elected or co-opted to Granborough Parish Council, including a start and finish date.

Archived Documents

These are electronically stored documents, not in everyday use but required for occasional reference. These documents are stored in folders as follows;

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- **Contracts and Agreements;** a folder containing contracts with suppliers of goods, services and software, leases, community asset registration and legal obligations.
Justification; The Council is legally required to keep this information
Time Period; Indefinitely
 - **Council Assets;** a folder containing any information about equipment and street furniture for which the Parish Council has responsibility.
Justification; Continuity and efficiency
Time Period; 12 years
 - **Finance & Insurance;** a collection of accounts spreadsheets, grants applied for or awarded, current insurance documents, audit documents and precept setting information.
Justification; The Council is legally required to keep this information
Time Period; Indefinitely
 - **General Administration;** within this folder is anything which the Clerk may need to refer to such as Competitions, Forms and Notices, Maps, Photos, Planning information, SLCC advice and legal topics.
Justification; Reference material to save the Clerk time and effort in recreating or researching something which has already been done.
Time Period; 6 years
 - **Minutes and Agendas;** an electronic copy of all Minutes and Agendas for official meetings called by the Parish Council.
Justification; The Council is legally required to keep this information, whilst paper copies of Minutes are kept, it is easier to perform searches for information on electronic copies.
Time Period; Indefinitely
 - **News Letters;** any publications the Parish Council has circulated to the villagers about Parish Council duties and functions.
Justification; Continuity & efficiency
Time Period; Indefinitely

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- **Personnel & Councillors;** folders containing vacancy and co-option notices, induction packs, the Councillor list, and employment information.
Justification; The Council is legally required to keep most of this information
Time Period; Councillor data will be held whilst the Councillor is active, Employee data will be held whilst the individual is employed, then for a further six years.
 - **Plans, Structures, Consultations;** A record of issues on which the Council has expressed an historical opinion or in which there is an ongoing interest. This includes plans such as VALP, structures such as HS2 and Consultations such as Modernising Local Government.
Justification; Continuity and efficiency
Time Period; Keep whilst there is an ongoing need for reference
 - **Policies and Standards;** Standard documents used by the Council such as members interests, standing orders, code of conduct, policies and procedures.
Justification; These documents govern the running of the Parish Council and are essential reference material.
Time Period; Retained whilst in force, deleted when replaced with updated versions.

Current Documents

These are stored separately in a folder labelled with the current year for quick and easy access. They include any ongoing information required by the Clerk or Councillors to carry out their duties. These documents will be stored under the same headings as Archived documents and prior to the annual meeting each year, will be audited. At this point all information to be Archived will be transferred and any information considered no longer relevant will be deleted. No documentation older than the current financial year will be stored in this folder.

Policy Review

This document was adopted at the annual meeting on 22nd May 2018 and will be due for review on 21st May 2019.

Annex A – NALC list Legal Top Note 40

Retention of Documents required for the audit of parish councils.

Document	Minimum Retention Period	Reason
Minute Books	Indefinite	Archive
Receipt and Payment or Income & Expenditure Accounts	Indefinite	Archive
Bank Statements	Last completed audit year	Audit
Quotations and Tenders	12 years	Statute of limitations
VAT Invoices	6 years	VAT
Wages	12 years	Superannuation
Insurance Policies	While Valid	Management
Title deeds, leases, agreements, contracts	Indefinite	Audit