



GDPR Records Retention Policy

This policy was approved and adopted by Haddiscoe Parish Council at their meeting on 5th September 2022.

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

It covers: Scope, Responsibilities and Retention Schedule.

Scope

This policy applies to all records created, received or maintained by Haddiscoe Parish Council in the course of carrying out its functions. Records are defined as all those documents which facilitate the business carried out by Haddiscoe 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 Haddiscoe Parish Council records may be selected for permanent preservation as part of the Councils archives and for historical research.

Responsibilities

Haddiscoe 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 this policy is the Clerk. The person responsible for records management will give guidance for good records management practice and will promote compliance with this policy so that information will be retrieved easily, appropriately and timely. Individual staff and employees must ensure that records for which they are responsible are accurate, and are maintained and disposed of in accordance with Haddiscoe Parish Council's records management guidelines.

Retention Schedule

The retention schedule refers to record series regardless of the media in which they are stored.

(Document, Minimum Retention Period, Reason)

Minutes

Minutes of Council meetings, Indefinite, Archive

Minutes of committee meetings, Indefinite, Archive

Employment

Staff employment contracts, 6 years after ceasing employment, Management

Staff payroll information, 3 years, Management

Staff references, 6 years after ceasing employment, Management

Application forms (interviewed – unsuccessful), 6 months, Management

Application forms (interviewed – successful), 6 years after ceasing employment, Management

Disciplinary files, 6 years after ceasing employment, Management

Staff appraisals, 6 years after ceasing employment, Management

Finance

Scales of fees and charges, 6 years, Management

Receipt and payment accounts, 6 years, VAT
Bank statements, Last completed audit year, Audit
Cheque book stubs, Last completed audit year, Audit
Paid invoices, Last completed audit year, VAT
Paid cheques, Last completed audit year, Limitation Act 1980
Payroll records, 3 years, HMRC
Petty cash accounts, Last completed audit year, Audit

Insurance

Insurance policies, 6 years after policy end, Management
Certificates for Insurance against liability for employees, 6 years after policy end, Management
Certificates for Public Liability, 6 years after policy end, Management
Insurance claim records, 6 years after policy end, Management

Health and Safety

Accident books, 3 years from date of last entry, Statutory
Risk assessment, 3 years, Management

General Management

Councillors contact details, Duration of membership, Management
Lease agreements, 12 years, Limitation Act 1980
Contracts, 6 years, Limitation Act 1980
Email messages, At end of useful life, Management
Consent forms, 5 years, Management
GDPR Security Compliance form, Duration of membership, Management