

LOVERSALL PARISH COUNCIL

DOCUMENT RETENTION POLICY

Date of Adoption 6TH May 2026

Introduction

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 and sets out how the council manages the retention and disposal of documents in accordance with:

- UK General Data Protection Regulation (UK GDPR)
- Data Protection Act 2018
- Local Government Act 1972
- Accounts and Audit Regulations 2015
- Limitation Act 1980

The Council recognises that records are an important asset and must be retained for legal, operational, and historical reasons, but not for longer than necessary.

This policy covers: Responsibilities, Retention Schedule and Scope of Policy

This policy applies to all records created, received or maintained by Loversall Parish Council while 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 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 historic research.

Scope

This policy applies to:

- all paper and electronic records
- All emails, correspondence, and attachments
- All records created, received, or held by Loversall Parish Council

It covers records containing personal data and non-personal data

GDPR

Loversall Parish Council will ensure that personal data is:

- Processed lawfully, fairly, and transparently
- Collected for specified, explicit purposes
- Adequate, relevant, and limited to what is necessary
- Accurate and kept up to date
- **Not kept longer than necessary**
- Stored securely and protected against unauthorised access

Retention periods are based on legal requirements and best practice.

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, and they are required to manage the 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. Councillors are responsible for ensuring records they create, or hold are managed in accordance with this policy.

Retention Schedule

Under the Freedom of Information Act 2000, the Parish Council is required to maintain a retention schedule listing the record series which it creates during 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 record keeping systems. This retention schedule refers to record series regardless of the media in which they are stored.

Retention of Documents

Document	Minimum Retention	Reason
Minute Books	Indefinite	Archive
Annual Records	Indefinite	Archive
Annual Return	Indefinite	Archive
Bank Statements	7 years	Audit/Mngt
Cheque book stubs	last completed audit	Management
Paying in books	last completed audit	Management
Quotations	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
Cert of Employers Liability	40 YEARS	Audit/LEGAL
Cert of Public Liability	40 YEARS	Audit/LEGAL
Assets register	Indefinite	Audit
Deeds, leases	Indefinite	Audit
Booking policy	7 years	Management
Copies of bills to hirers	7 years	Audit/Mngt

Planning Applications

All planning applications and relevant decision notices are available on the City of Doncaster Councils website <https://www.doncaster.gov.uk/services/planning/planning-applications-online-public-access>.

There is no requirement to retain duplicates locally. All Parish Council recommendations in connection with these applications are recorded in the council minutes and are retained indefinitely. Correspondence in connection with applications will be retained as stated below.

Declarations of acceptance Of office	Term of office+1yr	Management
Members register of Interests	Term of office+1yr	Management
Complaints	1 year	Management
General Information	3 months	Management
Routine Correspondence	6 months	Management

Disposal Procedures: All documents that are no longer required for administrative reasons should be shredded and disposed of accordingly.

Date of Adoption: Wednesday 6th May 2026

Adopted by full council

Review date: May 2027 or as there is any change in legislation