

Data Retention and Management of Information Policy

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. Information is an asset and the records of the Parish Council are important sources of administrative, evidential and historical information.

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. Records include all books, papers, maps, photographs or other documents. These records may be created, received or maintained in hard copy or electronically.

Records should only be kept for as long as they are needed by the Parish Council, for reference or accountability purposes, to comply with regulatory requirements or to protect legal and other rights and interests. 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. Once the minimum retention period has passed, records should be destroyed in a rolling programme, taking into account security of the information contained and confidentiality. This ensures good management of office and computer space.

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 the overall responsibility for the implementation of this policy is the Clerk to the Parish Council. The Clerk is required to manage the Council's records in such a way as to promote compliance with this policy so that information can be retrieved easily, appropriately and in a timely manner. Paper copies will be kept at Clerk's office (Historic and local interest documents will be sent to County Archives – see Retention Schedule.) Electronic copies will be kept on the Council computer at Clerk's office with hard-drive and electronic back-ups. Subject to specific reasons for retaining documents, as noted in Retention Schedule, documents/records may be destroyed when they are no longer of use or relevant; papers to be shredded and disposed of, electronic files/emails to be deleted. If in doubt they should be retained until proper advice has been received.

Retention Schedule

The Parish Council is required to maintain a Retention Schedule listing the records 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 record keeping systems. This Retention Schedule refers to records regardless of the media in which they are stored.

HOPTON WAFERS PARISH COUNCIL

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Type of Document	Information	Retention Action
Planning documents	Available on Shropshire Council website	Keep until built, if contentious or until appeal period expired, maintain register of planning as per Standing Orders. Delete correspondence with applicant within two years.
Employment Records	Statutory re Wages Personal information for references Application forms	Keep for 12 years. Keep for maximum 7 years Keep for six months
Correspondence	Audit General newsletters General correspondence	Keep for 3 years Circulate then destroy after 12 months. Keep for 2 years
General administration paperwork	ie. Meeting Schedules	Keep until general purpose met – duration of document.
Project information	ie. SmartWater	Retain until project complete + 12 months
Historical/local interest documents		Indefinitely at office or deposit at County Archives
Declarations of Acceptance of Office		Term of Office + 1 year
Register of Members Interests		Term of Office +1 year
Electoral Register	Paper and/or electronic plus monthly updates	Duration of document (usually 1 year)
Consultations, Surveys		Duration of consultation or survey and resultant project or policy
Complaints		1 year
Accounts and audit	Statutory	Keep at office for 8 years, then County Archives
Agendas	Including supporting documents/reports	Keep for 5 years.
Minutes	Including supporting documents/reports	Keep at office for 10 years, then County Archives. (Draft Minutes to be destroyed once Minutes approved)
Policies		Duration of document (destroy previous version after three months)
Website information	Council members and staff information. Residents information	Term of office or employment Two years
Local Plans	Core Strategy, SAMDev, Parish Plan	Indefinitely

NALC have provided a general list of documentation / records and recommended retention periods as may be required by law, general convention or by the Council's need. This is at Appendix A. This Policy supplements the NALC guidance. A Document Register (see Appendix B for details) will be maintained by the Clerk to record receipt, action, retention and disposal of documentation & records.