

**Bishops Lydeard and Cothelstone Parish Council**

**Document Retention Policy**

**Adopted February 2019**

**Reviewed 13 May 2026**

**Due for next Review: May 2027**

**1. Purpose:**

Bishops Lydeard and Cothelstone Parish Council (BLCPC) requires a wide variety of documents for transacting its business and is committed to retaining these documents in a format and for periods of time that:

- Enables BLCPC to meet its statutory obligations in respect of documents subject to legislation;
- Ensures security of documents;
- Protects employees' privacy;
- Facilitates access to information;
- Optimises the use of storage space;
- Is cost effective; and
- Facilitates destruction of redundant documents.

**2. Scope:**

This Policy applies to users of BLCPC's information records, both paper and electronic, it includes Councillors and employees.

**3. Statutory Requirements:**

Documents subject to a statutory period of retention are identified by their associated legislation in Annex A. This meets our requirements under the General Data Protection Regulations (GDPR)

**4. Security of Documents:**

BLCPC's records are held in paper and/or electronic format. Paper records are kept securely at the Clerk's home. Electronic formats are kept on a password protected BLCPC device.

**5. Employees' Privacy:**

The privacy of personnel records will be appropriately assured.

**6. Availability & Access:**

All records necessary for BLCPC's business will be retained for a period of time that reasonably assures the availability of records when needed.

**7. Storage and Destruction of Records:**

Redundant records may be destroyed. Destruction of paper records will be by shredding or burning. Destruction of documents will be undertaken in accordance with the provisions of this Policy to avoid any inference that a document was destroyed in anticipation of a problem.

### **8. Electronic Storage:**

Records maintained on electronic data processing storage media will be subject to the same rules of retention and security as paper records.

### **9. Implementation of Policy:**

The Clerk will be responsible for the implementation of the Policy.

### **10. Monitoring & Review of Policy:**

The Parish Council will review the Policy periodically to monitor its effectiveness, taking account of users' comments.

### **Annex A:**

<b>Document</b>	<b>Minimum Retention Period</b>	<b>Reason</b>
Signed minutes of Parish Council meetings (Hard copy)	Indefinite	Archive
Parish Council Finance Sheets and Records (Hard Copy)	Indefinite	Archive
Bank Statements	Last completed audit year	Audit
Cheque Book Stubs	Last completed audit year	Audit
Paid invoices / cheques	6 years	Limitation Act 1980 (as amended) and VAT
VAT records	6 years	VAT
Planning Applications	Until development completed	Planning and Enforcement
Parish Councillor Member Interests	18 months after individual ceases to be a Member	Management
Employee Records	12 years	Superannuation
Insurance Policies	While valid	Management
Public consultation – survey and returns	5 years	Management
Correspondence	6 months	Management