



Purley on Thames Parish Council

PURLEY ON THAMES PARISH COUNCIL DATA RETENTION TRANSFER & DISPOSAL POLICY

Introduction

Purley on Thames Parish Council recognises that the efficient control of records is necessary to support its business, comply with legal obligations, and manage information effectively.

This document sets out the period for which council records should normally be retained before they are destroyed or archived.

The Council follows guidance produced by the Society of Local Council Clerks and complies with the requirements of the UK General Data Protection Regulation, the Data Protection Act 2018 and the Freedom of Information Act 2000.

General Principles

Records will be retained only for as long as necessary to:

- Meet legal requirements
- Support operational needs
- Protect the Council's legal and financial interests
- Provide historical records of council activity

Once the retention period has expired, records will be securely destroyed unless they are considered to have historical value.

Retention Schedule

Document Type	Minimum Retention Period	Reason
Minutes of Council and Committee meetings	Permanent	Legal and historical record
Agendas and reports	6 years	Audit and legal purposes
Financial records (accounts, receipts, invoices)	6 years	Audit and HMRC requirements
VAT records	6 years	HMRC requirements
Bank statements	6 years	Financial audit
Annual governance and accountability returns (AGAR)	Permanent	Statutory record
Contracts and agreements	6 years after expiry	Limitation Act 1980
Insurance policies	6 years after expiry	Legal protection

Document Type	Minimum Retention Period	Reason
Insurance claims	Permanent	Legal record
Staff personnel records	6 years after employment ends	Employment law
Payroll records	6 years	HMRC requirements
Pension records	Permanent	Pension obligations
Complaints records	6 years	Legal protection
Data protection breach records	6 years	Regulatory evidence
Councillor declarations of interest	Until superseded	Governance requirement
Planning consultation responses	6 years	Legal record
Correspondence relating to council business	3–6 years depending on relevance	Operational record
Election documents	1 year	Electoral guidance
Routine administrative correspondence	2 years	Operational use

Disposal of Records

When records reach the end of their retention period they will be:

- securely shredded (paper records)
- securely deleted (electronic records)

Confidential records must be destroyed in a manner that protects personal data.

Archiving

Some records may be retained permanently because they have historical significance for the parish.

These may include:

- council minutes
- major project documentation
- historical photographs or records

Responsibility

The Parish Clerk is responsible for ensuring that records are retained and disposed of in accordance with this schedule.

Councillors and staff must ensure that council records are handled in line with this policy.

Policy Review

This schedule will be reviewed every three years or sooner if legislation changes.