

Upper Heyford Parish Council Document Retention and Disposal Policy

Reviewed & Approved in the Parish Council Meeting on the 17th July 2025
Minute Reference 19. a)
Next review July 2027

Upper Heyford Parish Council

1. Purpose

This policy sets out how Upper Heyford Parish Council manages the retention, storage, and disposal of documents and records. The aim is to ensure that important information is kept for as long as necessary, and that obsolete or redundant documents are disposed of securely and appropriately.

2. Scope

This policy applies to all records and documents created, received, or maintained by the Parish Council in the course of its business. It includes both physical and electronic records.

3. Legal Framework

This policy is guided by the following legislation and best practices:

- Local Government Act 1972
- Limitation Act 1980
- Data Protection Act 2018 / UK GDPR
- Freedom of Information Act 2000
- Local Audit and Accountability Act 2014
- Chartered Institute of Archivists' guidelines and NALC recommendations

4. Retention Periods

Below is a summary of key document types and their recommended retention periods:

Document Type	Retention Period	Notes
Minutes (Council and Committees)	Permanent	Must be archived securely
Agendas and Reports	6 years	
Annual Accounts and Audit Returns	6 years	Required under Accounts & Audit Regulations
Receipt and Payment Books	6 years	
Bank Statements and Reconciliations	6 years	
VAT Records	6 years	Statutory requirement
Payroll and PAYE Records	6 years	HMRC requirement
Insurance Policies	6 years after expiry	Indefinitely for liability-related policies
Planning Applications (Council responses)	3 years	Original kept by Planning Authority
Routine Correspondence (non-personal)	2 years	Subject to review

Document Type	Retention Period	Notes
Grant Applications (received or awarded)	6 years	
Title Deeds, Leases, Licences	Permanent	Original documents to be stored securely
Complaints and Investigations	6 years	Longer if ongoing legal issue
Staff Records (employment contracts, etc.)	6 years after leaving	Subject to safeguarding or pension requirements
Emails (routine admin)	1 year	Archive or delete unless required for record

5. Data Protection

Personal data must not be retained longer than necessary. The Council will:

- Regularly review records containing personal data
- Safely delete or destroy personal data when no longer required
- Ensure disposal is secure (e.g., shredding paper records, permanent deletion of digital files)

6. Storage and Security

- Records should be stored securely, with access limited to authorised personnel
- Backups of digital data should be taken regularly and stored safely
- Confidential records must be disposed of using secure methods

7. Disposal of Documents

Before disposing of any record, the Council will:

- Confirm that the minimum retention period has expired
- Ensure there is no ongoing legal, audit, or operational reason to keep it
- Use appropriate methods of disposal (e.g., shredding paper, secure deletion)

A Record of Disposal Log should be maintained, recording:

- The type of document
- The date of disposal
- The method of disposal
- The person authorising the disposal