Data Retention Policy for Hambledon Parish Council

Adopted 14 May 2026 (Mins Ref 3004)

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Introduction
Hambledon PC 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 Council.

This policy applies to all records created, received, or maintained by Hambledon PC while carrying out its functions. Records are defined as all those documents which facilitate the business carried out by the Council and which thereafter retained (for a set period) to provide evidence of its transactions or activities. These records may be created, received, or maintained in hard copy and/or electronically.

A small percentage of Hambledon PC's records will be selected for permanent preservation as part of the Council's archives and for historical research.

Responsibilities
Hambledon PC 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 to the Council, and the Clerk is required to manage the Council's records in such a way as to promote compliance.

Retention Schedule
Under the Freedom of Information Act 2000, the Council is required to maintain a retention schedule outlining how long they hold different types of records and what actions are taken when they are no longer needed. The retention schedule lays down the length of time which the record or document needs to be retained and the action which should be taken when it is of no further administrative use ensuring full compliance with the Data Protection Act 2018, which came into force on 25 May 2018 which gives effect to UK law to the UK General Data Protection Regulations (UK GDPR).

The Clerk to the Council 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. The retention schedule refers to record series regardless of the media in which they are stored.

RETENTION SCHEDULE

Records/Documents	Minimum Retention Period	Reason
Administration		
Minute Books	Indefinite	Archive
Meeting paperwork	Until no administrative requirement	Operational/Common Practice
Councillor documents e.g. Declarations of Acceptance of Office, Code of Conduct, DPI's	1 year after vacating office	Operational
Trusts, Title Deeds, Conveyances	Indefinite	Archive / audit management
Leases, agreements, contracts, wayleaves	Indefinite	Archive / audit management
Scale of fees and charges	6 years	Management
Correspondence– electronic	Until no administrative requirement	Operational
Correspondence - general	Until no administrative requirement	Operational
Complaints, FOI's/SAR's	2 years after resolution	Operational

Allotments		
Register and Plans	Indefinitely	Audit / management
Rental agreements	Whilst valid	Operational
Burial Grounds		
Register of fees collected, register of burials, register of purchased graves, register/plan of grave spaces, register of memorials, applications for interment, applications for right to erect memorials, disposal certificates, and copy certificates of grant of exclusive right of burial	Indefinite	Archives and Local Authorities Cemeteries Order 1977 (SI. 204)
Halls, Centre and Recreation Grounds		
Applications to hire, lettings diaries copies of bills to hires record of tickets issued	6 years	VAT / management
Financial		
Annual Returns /Accounts	Indefinite	Audit
Bank Statements, paying in, cheque books	Last completed audit year	Audit
Paid invoices	6 years	VAT
Paid cheques	6 years	Limitation Act 1980 (as amended)
VAT claims/records	6 years (20 years for VAT on rents)	VAT / audit / legal
Receipt/cash books/petty cash	6 years	VAT / Limitation Act 1980 (as amended)
Quotations and Tenders	6 years	Limitation Act 1980 (as amended)
Investments	Indefinite	Audit / management
Asset Register	Indefinite	Audit / management
Insurance policies	Whilst valid	Audit / management
Certificates for insurance against liability for employees/employers	Indefinitely	Future claims
Members allowance register (if applicable)	6 years	Tax, Limitation Act 1980
Personnel		
Salary records, payslips, wages books	12 years	Superannuation
Timesheets	3 years	Audit
PAYE/NI records	6 years	Audit / legal

Annual leave/pay	6 years	Audit / legal
Historical /Local Information		
Village Plans/Projects working documents	Until there is no longer an administrative requirement	Operational
Maps or historical documents including Rights of Way documents	Indefinitely	Archive / historical
Local and other publications	Until there is no longer an administrative requirement	Operational
Any historical documents pre-dating the parish council or not council related	Indefinitely	Archive / historical
Council owned publications, press cuttings, photographs	Indefinitely	Archive / historical

*The retention schedule above suggests the appropriate minimum retention periods for the most important documents for audit and other purposes, such as staff management, tax liabilities, cemetery management and where there may be the possibility of legal disputes and legal proceedings. If in doubt, documents should be retained until legal advice has been received.