

Willerby Parish Council
Document/Data Retention Policy

Introduction

Willerby 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.

This policy applies to all records created, received or maintained by the Parish Council in the course of its functions. Records are defined as all documents that facilitate the business carried out by the Parish Council and are 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 or electronically.

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 e.g. Minutes of meetings.

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 overall responsibility for implementing this policy is the Clerk to the Parish Council, who is required to manage the Council's records in such a way as to promote compliance with this policy, ensuring that information is retrieved easily, appropriately and in a timely manner.

Retention Schedule

Under the Freedom of Information Act 2000 and the General Data Protection Regulations 2018, the Parish Council is required to maintain a retention schedule listing the record series it creates in the course of its business. The retention schedule sets out the length of time each record series must be retained and the action to be taken when it is no longer of further administrative use.

The Clerk is expected to manage the current record-keeping systems in accordance with the retention schedule and to take account of the different retention periods when creating new record-keeping systems. This retention schedule applies to records regardless of the media in which they are stored.

Planning Applications

All planning applications and relevant decision notices are available on the East Riding of Yorkshire Council Planning Portal, so there is no requirement to retain duplicates locally. All Parish Council recommendations in connection with these applications are recorded in the Parish Council minutes and retained indefinitely.

Disposal procedures

All documents that have reached their disposal date and are no longer required for administrative purposes will either be shredded or disposed of via an external confidential waste company.

Electronic copies of documents will be deleted and removed from their device once they exceed their retention periods.

Retention of Documents

The table below shows the documents and data the parish council is likely to hold, along with the retention periods for each type of data, with a reason, location and disposal method provided for each retention period.

Storage Locations

Hard copies will be stored in the following locations.

- With the Parish Clerk
- Storage Container (within Wolfreton School grounds)
- East Riding Archive (Beverley)

Electronic files will be stored in the following locations:

- Parish Council Laptop (with Parish Clerk)
- Microsoft One Drive

Document	Minimum Retention Period	Reasons	Location Retained	Disposal
Minutes & Agendas	Indefinite	Archive & Management	Laptop, Website and Clerk's office.	Archive in Clerk's office and on Council laptop & website. Every five years archive at East Riding Yorkshire Council.
Annual Accounts AGAR	Indefinite	Audit & Archive	Council Laptop, website, Clerk's office and in storage container	N/A
Salary/ PAYE/NI /Employee Records	With Annual Accounts	Audit	With Annual Accounts in Container & Clerk's office	Last completed audit to be kept in Clerk's office and then moved to container.
Bank Statements	With Annual Accounts	Audit	With Annual Accounts in Container & Clerk's office	Last completed audit to be kept in Clerk's office and then moved to container.
VAT Records	With Annual Accounts	Audit & VAT	With Annual Accounts in Container & Clerk's office	Last completed audit to be kept in Clerk's office and then moved to container.
Receipts (Income)	With Annual Accounts	Audit	With Annual Accounts in Container & Clerk's office	Last completed audit to be kept in Clerk's office and then moved to container.
Bank Paying in Books	Last completed audit year	Audit	Clerk's Office	Confidential Waste Shredded
Cheque book stubs/	Last completed audit year	Audit	Clerk's Office	Confidential Waste Shredded
Paid Invoices (Expenditure)	With Annual Accounts	Audit	With Annual Accounts in Container & Clerk's office	Last completed audit to be kept in Clerk's office and then moved to container.

Insurance policies	While valid	Management & Public Liability	Clerk's Office	Confidential Waste Shredded
Title deeds, leases, agreements, contracts	Indefinite	Audit/Management	Clerk's office	Not Applicable
Asset Register	Indefinite	Archive	Council laptop, Clerk's office & with Annual Accounts in Container.	Not Applicable
Risk Assessments	With Annual Accounts	Potential Claims	With Annual Accounts in Container & Clerk's office	Last completed audit to be kept in Clerk's office and then moved to container.

Document	Minimum Retention Period	Reasons	Location Retained	Disposal
General Correspondence	3 months	Management	Clerk's Office	Confidential Waste/ Shredded
Emails	2 years	Management	Council Laptop	Delete from device.
Complaints	2 years or until resolved.	Management	Clerk's Office	Shredded or deleted.

Hard copies of quotations and tenders	While relevant	Management	With Annual Accounts in Container & Clerk's office	Last completed audit to be kept in Clerk's office and then moved to container.
Insurance Claims	Indefinite	Potential Claims	Clerk's Office	N/A
Historical information	Indefinite	Local Interest	Clerk's office	N/A
Declarations of Acceptance	During Term of Office	Management & Audit	Clerk's Office	Confidential Waste/ Shredded
Members Register of Interests	During Term of Office	Management & Audit	Clerk's Office	Confidential Waste/ Shredded

This policy was adopted at a Full Council meeting on the:
17th March 2026 - Minute Ref: 6071