

BALDONS PARISH COUNCIL

Data Retention Policy

Version 1.0	Date Adopted May 2026	Next Review May 2027	Approved by Full Council
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1. Introduction

This policy sets out how Baldons Parish Council manages the retention of its documents and records, both on the council's website and in its own files.

The council is committed to keeping records for as long as they are needed for legal, operational, and public accountability purposes, and to disposing of them appropriately once those purposes have been met. This policy applies to all councillors, the Clerk, and anyone acting on behalf of the council.

2. Scope

This policy covers the following types of council record:

- Minutes of council meetings
- Agendas for council meetings
- Financial records, including accounts, budgets, and supporting documents

It applies to records held on the council's website and to those kept in the council's own files (whether in paper or electronic form).

3. Website Publication

The council publishes minutes, agendas, and financial summaries on its website in accordance with its transparency and publication obligations under the Transparency Code for Smaller Authorities (2015) and the Local Government Act 1972.

3.1 Minutes

The council will keep publicly available on its website:

- Minutes from the current calendar year
- Minutes from the two preceding calendar years (i.e. the current year plus two years of history)

Minutes older than this will be removed from public display on the website but remain available on request from the Clerk.

3.2 Agendas

Agendas follow the same publication schedule as minutes: the current year and the two preceding years will be kept publicly available on the website. Older agendas are available on request.

3.3 Financial Records and Summaries

The following financial documents will be made publicly available on the website:

- Annual Governance and Accountability Return (AGAR), including the external auditor's certificate, for the current year and the two preceding years
- Current year budget and precept information

Detailed financial records (such as payment schedules, invoices, and bank reconciliations) are not published on the website but are available for inspection on request, in accordance with the council's obligations under the Accounts and Audit Regulations 2015.

3.4 Governance Policies

The council will also publish on its website its adopted governance policies, including Standing Orders, Financial Regulations, this Data Retention Policy, and its Privacy Notice. Other policies will be published where the council considers this consistent with its transparency obligations and the public interest. All adopted policies are available on request from the Clerk.

4. File Retention

The following retention periods apply to records held by the council, whether in paper or electronic form.

4.1 Minutes

Minutes are the official record of decisions made under statute. They should be retained permanently. The council will keep a complete archive of all minutes from its establishment. Signed copies of minutes should be kept in the minute book. Electronic copies should be held in the council's file store.

4.2 Agendas

Agendas should be retained permanently alongside the corresponding minutes. As short documents, the cost of permanent retention is low, and they provide useful context to the official record.

Where storage constraints make permanent retention impractical, agendas must be kept for a minimum of six years.

4.3 Financial Records

The council must retain financial records in accordance with the Accounts and Audit Regulations 2015 and the Limitation Act 1980, which sets a six-year period for contract claims.

The following minimum retention periods apply:

- Annual accounts and supporting working papers: 6 years minimum
- Receipts, invoices, and payment vouchers: 6 years minimum
- Bank statements and reconciliations: 6 years minimum

- VAT records (if applicable): 6 years minimum
- Precept information: 6 years minimum

Annual accounts and the AGAR are recommended to be kept permanently as summary records of the council's financial history.

5. Retention Summary

The table below summarises the council's retention schedule for key document types.

Document Type	Website	On File	Notes
Minutes	Current year + 2 years	Permanently	Older copies available on request from Clerk
Agendas	Current year + 2 years	Permanently (min. 6 years)	Older copies available on request
Annual accounts / AGAR	Current year + 2 years	Permanently recommended	Minimum 6 years statutory
Invoices & receipts	Not published	6 years minimum	Available for inspection on request
Bank statements	Not published	6 years minimum	
Precept information	Current year only	6 years minimum	

6. Requests for Older Records

Any member of the public may request access to older records not currently displayed on the website. Requests should be directed to the Clerk by email or in writing.

The council will acknowledge requests within five working days and aim to respond within 20 working days, in accordance with the Freedom of Information Act 2000.

7. Responsibility

The Clerk to the Council is responsible for maintaining records in accordance with this policy, ensuring the website is kept up to date, and managing requests for older documents.

The council will review this policy annually. Significant changes to the council's activities or relevant legislation may prompt an earlier review.

8. Legal and Regulatory Framework

This policy has regard to the following:

- Local Government Act 1972

- Accounts and Audit Regulations 2015
 - Limitation Act 1980
 - Transparency Code for Smaller Authorities 2015 (DCLG)
 - Freedom of Information Act 2000
 - UK General Data Protection Regulation (UK GDPR) and Data Protection Act 2018
 - NALC and SLCC guidance on document retention for local councils
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