



## TUTBURY PARISH COUNCIL

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### Tutbury Parish Council Records Management and Retention Policy

1. Purpose Tutbury Parish Council recognises its duty to manage records properly to:
  - Comply with legal and audit obligations
  - Protect personal data under the UK GDPR
  - Maintain transparency and effective governance
  - Ensure information is accessible when needed and disposed of securely when no longer required.
2. Scope This policy applies to all records held by the council in any format, including electronic records stored on OneDrive, and paper records retained by the Clerk.
3. Records Management Principles The Council will:
  - Maintain accurate and up-to-date records
  - Store records securely in Microsoft OneDrive with appropriate access restrictions
  - Retain records only as long as necessary for legal, operational, or historic purposes
  - Dispose of records securely
  - Review records annually to confirm retention needs and compliance.
4. Storage and Security
  - The Council uses OneDrive (Microsoft 365) as its primary storage system.
  - Access to OneDrive is limited to the Clerk.
  - Devices used to access OneDrive must comply with the Council's Bring Your Own Device (BYOD) Policy, including password protection and up-to-date security software.

## 5. Retention Schedule

Record Type	Minimum Retention Period	Where Stored	Notes
Minutes (signed)	Indefinite	Paper electronic unsigned	Archive purpose
Receipts & Payments Account	Indefinite	OneDrive Finance folder	Audit & archive
Bank statements, cheque book stubs	Last completed audit year		Audit
Paid invoices, quotations, tenders	6 years	Filing cabinet	VAT and Limitation Act 1980
VAT records	6 years (20 years for rents)	Finance folder	VAT Act
Insurance policies	As long as claim can be made	OneDrive Insurance folder	Keep record of insurers and policy numbers indefinitely
Certificates of Employers' Liability Insurance	Indefinite	OneDrive Insurance folder	Legal requirement
Contracts, title deeds, leases	Indefinite	OneDrive Contracts folder	Audit and legal
Payroll records	12 years (wages books); 6 years (PAYE records)	OneDrive Payroll folder	Tax, audit, pensions
Electoral Register	Until superseded	OneDrive secure folder	Restricted to Clerk only
Councillor contact details & Register of Interests	ESBC Stored Duration of office + 6/1 years	OneDrive Councillors folder	Legal requirement
Grant applications	6 years	OneDrive Grants folder	Audit, legal, contains personal & financial data
Correspondence – general parishioner queries	Reviewed annually, delete after 2 years unless legally required longer	Clerk email & OneDrive	Data minimisation under GDPR
Planning applications & objections	Until development completed + appeal expiry	OneDrive Planning folder	May be kept longer if precedent value
BYOD usage data	As long as user remains in role	Local devices; OneDrive	Governed by BYOD Policy
Historical correspondence (e.g. church, planning objections)	Review annually; retain only if necessary under Limitation Act (6 years general)	OneDrive Archive folder	Recommend annual review for minimisation
Website & social media posts	Ongoing	Website host, Facebook	Review annually for relevance

Annual Review Process The Clerk will:

- Review all folders on OneDrive annually each January to:

- Check retention compliance
  - Delete records no longer required, documenting deletions
  - Ensure access permissions remain correct
  - Report review outcomes to the Council annually as part of the internal control review.
7. Disposal When disposing of records:
- Electronic files will be permanently deleted from OneDrive and removed from the recycle bin.
  - Paper records will be shredded or disposed of securely via confidential waste services.
8. Responsibilities
- Clerk: Responsible for implementation, review, and management of records in line with this policy.
  - Councillors: To ensure data accessed or held on personal devices under the BYOD Policy is used and deleted in accordance with this policy.
9. Policy Review This policy will be reviewed annually each May alongside the Council's Data Protection and BYOD Policies to ensure continued compliance with legal, audit, and data protection requirements.

Date last Ratified/Approved	Version Number	Revision/Amendment Made
15.9.25	1	May 2027