



TODMORDEN TOWN COUNCIL

Data Retention Policy

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1. Introduction

The Town 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 Town Council.

This document provides the policy framework through which this effective management can be achieved and audited. It covers:

- Scope
- Responsibilities
- Retention Schedule

2. Scope of the Policy

This policy applies to all records created, received or maintained by the Town Council while carrying out its functions. Records are defined as all those documents which facilitate the business conducted by the Town Council and which 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 Town Council's records will be selected for permanent preservation as part of the Council's archives and for historical research.

This policy has been drawn up within the context of:

- Freedom of Information
- General Data Protection Regulation

And with other legislation or regulations (including audit and Statute of Limitations) affecting the Town Council.

3. Responsibilities

The Town Council has a corporate responsibility to maintain its records and record management systems in accordance with the regulatory environment. **Staff and councillors are expected to be aware of data protection responsibilities when creating and retaining records.**

The person with overall responsibility for the implementation of this policy is the Clerk to the Town Council, and the Clerk is required to manage the Council's records in such a way as to promote compliance with this policy so that information will be retrieved easily, appropriately and in a timely manner.

4. Retention Schedule

Under the Freedom of Information Act 2000, the Town Council is required to maintain a retention schedule listing the record series which it creates during its business. The retention schedule lays

down the length of time which the record needs to be retained and the action which should be taken when it is of no further administrative use.

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

Document	Retention Period	Reason
Signed Minutes/Electronic Minutes	Permanently	Archive
Annual Accounts	Permanently	Archive
Annual Audit Returns	Permanently	Archive
Bank Statements	8 years	Audit/ Management
Cheque Book Stubs	8 years	Management
Paying in books	8 years	Management
Quotations	8 years	Audit
Paid Invoices	8 years	Audit
Receipts	8 Years	Audit
VAT Records	8 years	Audit
Salary Records	8 years	Audit
Tax and NI records	8 years	Audit
Employee Records	3 years	Audit
Period of employment details	8 years	Audit
Employee/Councillor travel/expenses claim	8 years	Audit
Pension information	13 years	Audit
Insurance Policies	Whilst valid	Audit
Insurance Claims	8 years after completion	Audit
Certificate of Employers Liability	Permanently	Audit / Legal
Certificate of Public Liability	Permanently	Audit/ Legal
Council Policies	Current version Permanently Previous version 1 year	Audit/Management
Asset Register	Permanently	Audit
Deeds and Leases	Permanently	Audit
Declaration of acceptance of Office (Cllr)	Term of office + 1 year	Management
Members Register of Interests	Term of office + 1 year	Management
Complaints	One year	Management
General Information	Three months	Management

Routine Correspondence/emails	Six months after relevant issue is completed	Management
Public Consultation, survey & returns	5 years	Management
Documentation for Legal purposes (unless extended)		
Negligence	6 years	Limitation Act 1980 (as amended)
Defamation	1 years	Limitation Act 1980 (as amended)
Contract/Agreement	6 years	Limitation Act 1980 (as amended)
Sums recoverable	6 years	Limitation Act 1980 (as amended)
Rental Agreement	12 years	Limitation Act 1980 (as amended)
Personal injury	3 years	Limitation Act 1980 (as amended)
To recover land	12 years	Limitation Act 1980 (as amended)
Rent	6 years	Limitation Act 1980 (as amended)

Planning applications are retained by Calderdale Metropolitan Borough Council. There is no requirement to retain duplicates locally. All Town Council recommendations in connection with these applications are recorded in the Council minutes and are retained permanently.

Correspondence received in connection with applications will be retained as stated above (see Correspondence)

All documents that are no longer required for administrative purposes will be shredded (if confidential) or recycled waste.