

HARVINGTON PARISH COUNCIL.

RECORDS/DATA RETENTION MANAGEMENT/DISPOSAL OF RECORDS POLICY.

Updated July 2025.

Harvington Parish Council is aware that efficient management of its records is required to comply with its legal and regulatory obligations. Under the Freedom of Information Act 2000 requires the Council to maintain a retention schedule. Records need to be cared for so they can be accessed as needed and do not deteriorate with time. Town and parish councils also have a responsibility to comply with the 2018 General Data Protection Regulation and the Freedom of Information Act 2000. The General Data Protection Regulation retains the existing legal principles of the 1998 Data Protection Act and adds some additional protections as to how personal data and sensitive data can be used.

The Data Protection Act

The Data Protection Act 1998 sets out high standards for the handling of personal information and protecting individuals' rights for privacy. It also regulates how information can be collected, handled and used. The Data Protection Act applies to anyone holding information about people electronically or on paper.

The General Data Protection Regulation

The General Data Protection Regulation 2018 says that information provided to people about how we process their personal data must be concise, transparent, intelligible and easily accessible, written in clear and plain language, particularly if addressed to a child and free of charge. A small proportion of your records merit permanent preservation as archives because of the unique evidence they contain about your community. These guidelines have been produced to offer advice on what to keep, for how long and finally what to do when they are no longer needed for business purposes.

Responsibilities.

The Council is responsible for determining whether to retain or dispose of documents and should undertake a review of documentation at least on an annual basis to ensure that any unnecessary documentation being held is disposed of under the General Data Protection Regulations.

Document Retention.

Under the Freedom of Information Act 2000 the Council should have in place an adequate system for documenting the activities of their service. The Clerk is overall responsible for the implementation of this policy and is required to manage the Council's records so information is easily accessible.

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In the event of a Parish Councillor resigning or failing to retain their post following the election process, it is the parish councillor's responsibility to ensure anything remaining within their possession which is related to the business of the Parish Council is passed to the Parish Clerk within ten working days of ceasing to hold the position of a parish councillor.

Documents and records are retained by the Parish Clerk in secure conditions. The person with overall responsibility for implementation of this policy is the Clerk to the Council who is required to manage the council's records in compliance with this policy and so that relevant information can be retrieved easily in a timely manner and disposed of appropriately.

Parish Councillors are required to pass all documents and records, whether received electronically, or in a hard copy, to the Parish Clerk for retention in accordance with this policy. In the event of a Parish Councillor resigning or failing to retain their post following the election process, it is the Parish Councillor's responsibility to ensure anything remaining within their possession which is related to the business of the Parish Council is passed to the Parish Clerk within ten working days of ceasing to hold the position of a parish councillor.

Documents and records are retained by the Parish Clerk in secure conditions.

Relationship with existing policies:

This policy will relate to the Council's:

- Freedom of Information Policy
- Publication Scheme (based on the Information Commissioner's Office model)
- Data Protection Policy.

Document Disposal.

A record of the disposal will be kept complying with the General Data Protection Regulations.

Documents can be disposed of by any of the following methods:

Non-confidential records: place in waste paper bin for disposal.

Confidential records or records giving personal information: shred documents.

Deletion of computer records.

Transmission of records to an external body such as the County Records Office.

Scanning of Documents.

Once a document has been scanned on to a document image system the original becomes redundant. Original documents required for VAT and

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tax purposes should be retained for six years unless a shorter period has been agreed with HM Revenue and Customs. The policy also ensures that valuable information is not destroyed and that information held is relevant. This policy applies to all records created, received or maintained by the Parish Council in hard copy or electronic format. The Clerk will be overall responsible for the implementation of the policy and managing the Council's records.

Once a document has been scanned on to a document image system the original becomes redundant. Original documents required for VAT and tax purposes should be retained for six years unless a shorter period has been agreed with HM Revenue and Customs. The policy also ensures that valuable information is not destroyed and that information held is relevant. This policy applies to all records created, received or maintained by the Parish Council in hard copy or electronic format. The Clerk will be overall responsible for the implementation of the policy and managing the Council's records.

Appendix A list of Documents for Retention or Disposal.

Please note the Allotments are not owned/managed by the Parish Council.

DOCUMENT	MINIUMUM RETENTION PERIOD	REASON	LOCATION RETAINED	DISPOSAL
Administrative				
Agendas	5 years	Management.	Website	Bin
Draft Minutes/Notes/ Recordings	Until Minutes are approved.	Management.	Office	Bin
Complaints.	2 years after conclusion.	Management.	Computer/Office	Bin
Correspondence and emails.	6 months or for as long as relevant/useful.	Management.	Computer/Office	Bin/Shred
Declaration of Acceptance of Office	Term of Office + 1 year.	Management.	Office.	Bin/Shred
Documents circulated with Agenda.	End of administrative use.	Operational.	Computer/Office	Bin/Shred/Retain if important.
Electronic files (Dropbox/Drive)	6 years (except *)	Management.	Computer	Delete.
Harvington Village News April 1998; May 1999 - July 1999; October 1999 - December 1999; October 2003; Nov. 2008 - June 2015; July 2015 - April 2018.May 2024-May 2025;	I Deposit copy with British Library + WCC Archive.	Archive Website 1 year.	Office prior to Records Library.	Archive/ Legal deposit Libraries Act 2003.

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Minutes: (Hard copy) July 2004 – 2024. Including Confidential Minute June 8 th 2022.	Indefinite	Archive	Dropbox /Computer 6 years delete. April 2015 onwards to 2024 in Archive.	Archive original signed copies.
Policy documents	Until no longer administrative requirement.	Management	Computer/Website/Office	Bin.
Register of Electors	Until no longer administrative requirement.	Destroy	Computer.	Shred confidential waste
Councillor Information.				
Declarations of Interest	2 years from end of Office.	Legal	Office	Shred/Bin.
Register of Members Interest	Duration of Office +1 year.	Legal	WDC	WDC to remove.
Contact details	Duration of Office.	Management.	Office	Bin/Shred.
Finance				
Accounts Receipt & Payment 1996 - 2025.	Indefinite.	Archive.	Office.	Worcestershire Archives
Annual Return/Audited Accounts	AGAR remains available for public access for a period of not less than 5 years from the date of publication.	5 years	Computer/File.	Bin/Shred
Annual Parish Meeting Minutes March 2009-March 2024.	Indefinite	Archive	Office prior to Archive	Worcestershire Archives.
Bank paying in book.	Last completed audit year.	Audit.	Office	Shred confidential waste
Bank Statements.	Last completed audit year.	Audit.	Office	Shred confidential waste
Cheque book stubs	Last completed audit year.	Audit.	Office	Shred confidential waste
Expenses, postage etc.	6 years.	Tax, VAT + Limitation Act 180 (as amended).	Computer/ Office	Bin/Shred
Grant applications.	6 years	Management	Computer/ Office	Bin/Shred
Paid Receipts & Payments Invoices	6 years	Management	Office/ Computer	Bin/Shred
Purchase Orders	6 years	Audit/VAT	Office/Computer	Bin/Shred.
Parish Paths Partnership Scheme	6 years	Management	Office/ Computer	Bin/Shred
Precept Orders	6 years	Management	Office	Bin/Shred

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Quotations & Tenders. (Successful)	6 years after contract end.	Limitation Act 1980	Computer/ Office	Bin/Shred.
Quotations & tenders (Unsuccessful)	2 years	Management	Computer/ Office	Bin/Shred
Contract/Timesheets. (Lengthsman/Flood Allev)	6 years	Management.	Office.	Bin/Shred
VAT records.	6 years	VAT.	Office/Computer.	Shred confidential waste.
Insurance.				
Insurance policies.	While valid.	Management.	Office	Bin.
Insurance Employer Liability certificates 2002-2025.	40 years.	2002-2006 Archive. The Employers Liability (Compulsory Insurance) Regulations 1998 (Sl.2753), Management.	Archive.	Worcestershire Archives.
Risk Assessment.	Once superseded or inactive.	Management	Computer.	
Land				
Jubilee Orchard - Lease, Register of title to land at Leys Road.	Indefinite	Archive.	Office.	N/A
Playing Field Title Deeds (+ Conveyance Mar. 1952 and Mar 1920; Land charges Act x 2; Station Road Documents; MEB; Oyez Services Ltd correspondence.; Abstract of title to land opposite Cedar Lodge. Epitome of Title; Planning permission; contract of sale of land, now Playing Field.	Indefinite	Archive.	Archive.	N/A
Title to land opposite Cedar Lodge.	Indefinite.	Archive.	Archive	N/A
Conservation Appraisal, Harvington.	Indefinite.	Archive.	Archive.	N/A
Miscellaneous				
BBC Child of our time - CD + sample questionnaire.	Indefinite.	Archive.	Archive.	N/A
Census results 1991	Indefinite	Archive		N/A
Finance & General Purposes Notes.	Last completed audit year.	Management.	Office/Computer.	Bin.

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Harvington Gras Games 2011 x 2 CD.	Indefinite	Archive.	Archive.	N/A
Harvington transport through time booklet 2011.	Information.	Archive.	Archive.	N/A
Harvington Recreational Trust Fund Deed + Financial statement 31st December 2015.	Indefinite	Archive.	Archive.	N/A
Harvington Village Hall Deed Sept. 1951.	Indefinite	Archive.	Archive.	N/A
HPC; Harvington Trust; WDC Certificate of Worcestershire Partnership Compact awards 2011.	Indefinite	Archive.	Archive.	N/A
Information from other bodies i.e. CALC; principal authorities; circulars	Retained for as long a useful and relevant.	Information.	Office/Computer	Bin
Public Bridleway - documents Anchor Lane.	Indefinite	Archive	Archive.	N/A
Public consultation - survey and responses.	6 years	Management.	Office/Computer	Bin/Shred
St. James the Great. Leaflet 'In Living Memory'	Indefinite	Archive.	Archive.	N/A
Tree Preservation Orders	Indefinite	Management.	Office/Computer.	Indefinite
Village report Nov. 1970; Study by Planning.	Information.	Archive.	Archive.	N/A
Harvington Party in the Park 2024	Information.	Archive.	Archive.	N/A
Welcome to Harvington Booklet.	Information.	Archive	Archive	N/A
Severn Trent Water – Apparatus Location Enquiry.	Information.	Archive,	Archive.	N/A
Environmental Committee: The Shape of our Village 2008.	Information	Archive.	Archive.	N/A
Transfer of Licensing 21-23 Leys road, Harvington. 28/02/2025.	Information.	Archive.	Archive.	N/A
Personnel				
Files	6 years after termination of leave.	Risk litigation	Computer/Office	Shred.

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Recruitment (Successful)	Add to Personnel file.	Management.	Office.	
Recruitment (Unsuccessful)	6 months after recruitment finalised.	Management	Chairman.	Shred
Planning				
Parish Plan/Neighbourhood Plan/DVD Parish Plan/Village Design statement DVD. Parish Plan report 2008-9.	Indefinite.	Archive.	Archive/Office copy.	N/A
Planning	End of administrative use. Appeals 1 year unless development.	Computer/Website/Office	Office.	Bin.
Weekly Inspection record of Orchard and Play area – 2013-2022;2004 Annual Play Inspections.	Retained for 21 years.	Potential claims	Records Library and Memory stick in Office.	Archive/Office.

NB:

Information from other bodies: retained for as long is useful and relevant.

Planning documents: documents are kept by the Planning Authority, Wychavon District Council.

Deposit, storage and management of documents: documents kept at Clerk's home in appropriate filing cabinet and storage boxes. Computer records stored on 'Dropbox'.

Archive records: are retained by The Hive, Worcester.

Appendix B: General Data Protection Policy 2018 - records maintained of appropriate disposals.

<u>NAME OF DOCUMENT</u>	<u>DATE DESTROYED</u>	<u>METHOD DESTROYED</u>
Two applications for Co-Option 2017.	28.02.19	Shredded.
Application for Co-Option 2024.	01.06.25	Shredded.

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