

Woodham Mortimer and Hazeleigh Parish Council

RECORDS RETENTION SCHEDULE

Record Type	Minimum retention period	Reason / legal basis
Minutes (draft and signed)	Permanent (retain indefinitely)	Statutory record of decisions; public record
Agendas and meeting papers	6 years	Audit and public record; keep longer if they contain unique records
Accounts, receipts, invoices, VAT records	6 years	HMRC / statutory accounting requirements
Payroll records (including PAYE)	6 years	HMRC / employment law
Insurance policies and claims	While policy active + 6 years	Contractual and potential claims period
Contracts and leases	6 years after end of contract	Contractual limitation periods; retain longer for land/asset deeds
Asset register	Permanent (retain while asset exists + 6 years)	Financial record and audit trail
Planning responses and consultations	6 years	Audit and public record; may be kept longer if linked to ongoing matters
Correspondence (official council business)	3 years	Operational need; retain longer if it forms part of a statutory record or legal case
Complaints and disciplinary records	6 years	Legal and evidential purposes; longer if litigation or safeguarding involved
Freedom of Information (FOI) requests & responses	3 years	Audit trail; retain longer if subject to review or appeal
Subject Access Requests (SARs)	6 years	Record of handling and potential legal challenge
Electoral roll / register extracts	Retain while in use + 1 year	Data minimisation; follow electoral law where applicable
Volunteer and contractor records	6 years after end of engagement	Employment/contractual and liability reasons

Staff personnel files	6 years after employment ends	Employment law and potential claims; pension records retained as required
Health and safety records / accident reports	3 years (adults); 3 years after 18th birthday (children)	H&S and safeguarding; retain longer if required by law
Electoral and polling station records	1 year	Operational; retain longer only if required by law
Website content (published documents)	Retain current + archive historic versions for 6 years	Transparency and public record; archive for continuity
Emails (official council accounts)	1–3 years (subject to content)	Short retention for routine emails; retain longer if they form part of statutory records

Guidance for use and disposal

- **Apply the schedule by record category, not by storage medium.** Electronic and paper records follow the same retention periods.
- **Review annually.** The Clerk should review retention decisions and the schedule at least once a year.
- **Secure disposal.** Paper records: confidential shredding. Electronic records: secure deletion (overwrite or use secure deletion tools).
- **Exceptions.** If litigation, an FOI appeal, or an ICO investigation is reasonably anticipated, suspend disposal of relevant records until the matter is concluded.
- **Archiving.** Permanent records (minutes, asset register, title deeds) should be archived in a secure, backed-up location and clearly labelled.
- **Document the rationale.** For any deviation from the schedule (retain longer or delete earlier), record the reason and approval.