

SOMERCOTES PARISH COUNCIL

DATA RETENTION SCHEDULE | Adopted September 2024

Somercotes Parish Council shall retain data in accordance with this Schedule.

Category	Min-Retention Period	Reason(s)
Class – Minutes		
Minutes of Council Meetings	Indefinite	Statutory
Minutes of Committee Meetings	Indefinite	Statutory
Class - Employment		
Staff employment contracts	6 years after ceasing employment	Statutory, management
Staff payroll information, wages book	12 years	Statutory, management
Staff references	6 years after ceasing employment	Management
Application forms (interviewed – unsuccessful)	6 months	Management
Application forms (interviewed – successful)	6 years after ceasing employment	Management

Disciplinary files	6 years after ceasing employment	Management
Staff appraisals	6 years after ceasing employment	Management
Timesheets	3 years	Statutory, management
Class – Finance		
Scale of fees and charges	6 years	Statutory, management
Receipt and payment accounts	Indefinite	Statutory, audit
Receipt books	6 years	VAT
Bank statements	2 years	Audit
Cheque book stubs	2 years	Audit
Paid invoices	2 years	Audit, VAT
Paid cheques	2 years	Statutory
Payroll records	6 years	Statutory, HMRC
Petty cash, postage, and telephone books	2 years	Statutory, HMRC, VAT
VAT records	6 years	VAT
VAT on rents	20 years	VAT

Investments	Indefinite	Audit, management
Title deeds, leases, agreements, contracts	Indefinite	Audit, management, legal
Quotations and Tenders	6 years	Statutory
Class – Insurance		
Insurance policies	6 years after policy ends	Management
Certificates for Insurance against liability for employees	Indefinitely	Statutory, management
Certificates for Public Liability	6 years after policy end	Management
Insurance claim records	6 years after policy end	Management
Class – Health and Safety		
Accident books	3 years from date of last entry	Statutory
Risk assessment	3 years	Management
Class – General Management		
Councillors contact details	Duration of tenure	Management
Members allowances register	6 years	Statutory
Lease agreements	12 years	Statutory

Contracts	6 years	Statutory
E-Mail Messages	At end of useful life	Management
Consent forms	5 years	Management
Members GDPR Compliance Form	Duration of tenure	Management
Class – Halls and recreation grounds		
Application to hire, lettings diaries, copies of bills to hirers, record of tickets issued	6 years	VAT, HMRC, Management
Class – Allotments		
Register and plans	Indefinite	Statutory, management
Lease agreements	12 years	Statutory, management