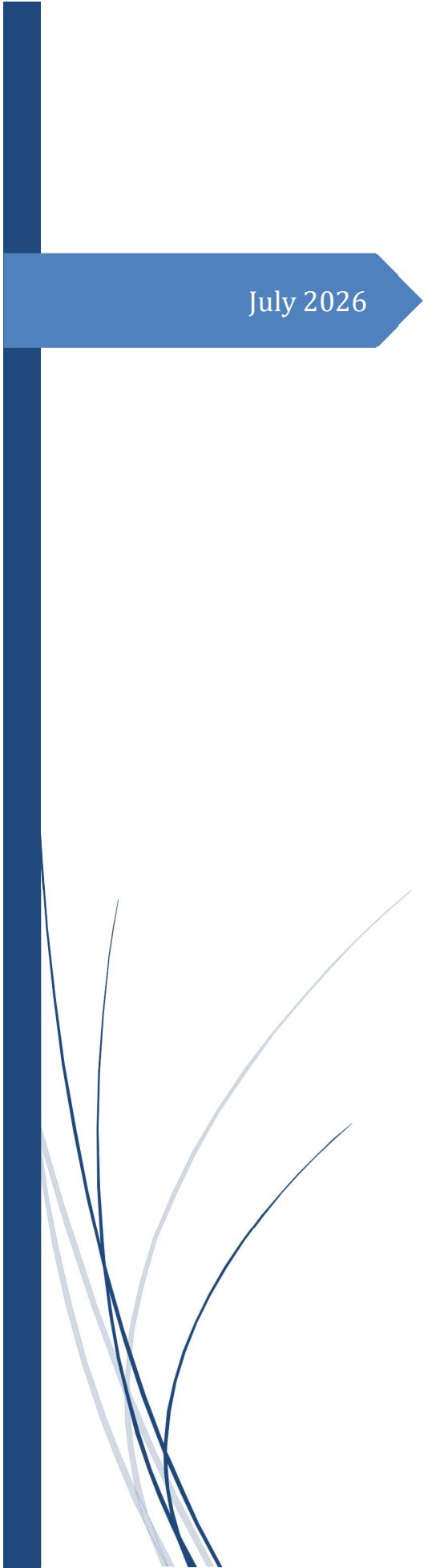
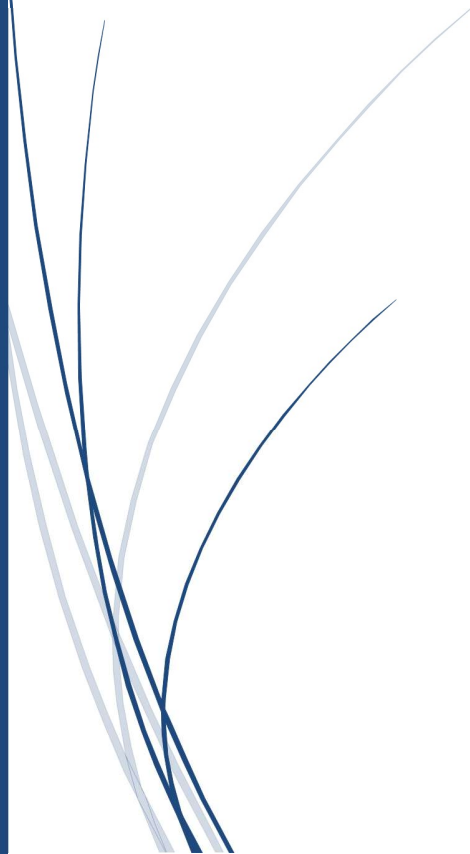


A thick dark blue vertical bar runs down the left side of the page. A medium blue arrow points to the right, overlapping the bar, with the text 'July 2026' inside it.

July 2026

Records Retention Policy

Several thin, light blue curved lines originate from the bottom left and sweep upwards and to the right, creating a sense of movement or a stylized signature.

Jane Smith
LATHOM SOUTH PARISH COUNCIL

Lathom South Parish Council

Records Retention Policy

1. Purpose

This policy sets out how Lathom South Parish Council manages, stores and disposes of its records. It is intended to ensure that records are kept for as long as they are needed for legal, operational, financial and historical reasons, and then disposed of securely.

2. Scope

This policy applies to all records held by the Council, whether in paper or electronic form, including those created or held by the Clerk and any councillors acting on behalf of the Council.

3. General principles

The Council will:

- keep records only for as long as they are needed;
- retain records required by law or for audit, tax, employment or contractual purposes;
- dispose of records securely and confidentially;
- preserve records of permanent historical value;
- review records regularly to ensure they are not kept longer than necessary.

4. Retention schedule

Record type	Retention period	Disposal method
Minutes of Council and committee meetings	Permanent	Archive
Agendas and agenda packs, including supporting reports	3 years, or longer where the papers relate to a significant decision, complaint, contract, land matter or other continuing issue	Secure delete/shred
Annual accounts, VAT records, bank statements, receipts, invoices	6 years	Secure delete/shred
Precept records and financial budget papers	6 years	Secure delete/shred
Audit records and correspondence with auditor	6 years	Secure delete/shred
Payroll records, wage records, deductions and PAYE information	12 years	Secure delete/shred
Employment contract, job description and personnel file	6 years after employment ends	Secure delete/shred
Disciplinary, grievance and complaint records	6 years after case closed	Secure delete/shred

Risk assessments, insurance policies and claims records	6 years after expiry or settlement	Secure delete/shred
Planning application responses and related correspondence	6 years	Secure delete/shred
Correspondence and routine administration	1–3 years depending on relevance	Secure delete/shred
Policies and procedures	Current version plus 6 years after replacement	Archive/delete
Registers of interests and declarations	Current plus 6 years	Archive/delete
Website content and social media records of governance relevance	1–3 years unless required longer	Delete/archive as appropriate

5. Permanent records

The following records should normally be kept permanently:

- signed minutes of Council meetings;
- annual governance and accountability statements;
- final audited accounts;
- deeds, leases and land ownership documents;
- contracts of permanent historical importance;
- any records judged to have archival value.

6. Secure disposal

Records due for disposal will be destroyed securely by:

- shredding paper records; and/or
- permanently deleting electronic files, including from recycle bins and backups where practicable.

Confidential records must never be left in general waste or accessible to unauthorised persons.

7. Responsibility

The Clerk is responsible for the day-to-day operation of this policy, including identifying records for retention or disposal. The Council remains responsible for ensuring compliance.

8. Review

This policy will be reviewed every two years, or earlier if legislation, guidance or Council practice changes.