ASTON, COTE, SHIFFORD & CHIMNEY PARISH COUNCIL

CLERK'S BRIEFING NOTES

PARISH COUNCIL MEETING ON 3rd July 2025

Prepared by Elaine Anstee
24th June 2025

Agenda Item 9

Correspondence

All correspondence by email

Agenda Item 13a – Data Retention Policy

Data Retention Policy

The Parish 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 Parish Council.

This policy applies to all records created, received or maintained by the Parish Council in the course of carrying out its functions. Records are defined as all those documents which facilitate the business carried out by the Parish Council and which are thereafter retained (for a prescribed period in accordance with this policy) 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 Parish Council's records will be selected for permanent preservation as part of the Council's archives and for historical research.

Responsibilities

The Parish Council has a corporate responsibility to maintain its records and record management systems in accordance with the regulatory environment. The person with the overall responsibility for the implementation of this policy is the Clerk to the Parish 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, appropriate and in a timely manner.

Retention Periods

Document	Retention Period	Reason
Minute Books	Indefinite	Archive – legal requirement under the Local Government Act 1972
Minute Books of Annual Parish Meeting	Indefinite	Archive – legal requirement under the Local Government Act 1972
Draft Minutes/Clerk's notes of meeting used to prepare minutes	Until the Minutes are approved	Management
Meeting Agendas and Supporting Papers	4 years	Management
Leases	Indefinite	Audit
Title Deeds	Indefinite	Audit
Asset registers	Indefinite	Audit
Byelaws and orders	Indefinite	Management/Archive
Policies and Procedures	Indefinite (archive after superseded)	Management/Archive
Risk Assessments	7 years	Management/Insurance
Financial Records		
Annual Accounts (AGAR)	Indefinite	Archive
Annual Returns (AGAR)	Indefinite	Archive
Annual Budget	7 years	Audit/HMRC
Precept Demands	7 years	Audit/HMRC
Bank Statements	7 years	Audit/HMRC/management
Cheque book stubs	7 years	Audit/HMRC
Paying in books	7 years	Audit/HMRC
Paid invoices	7 years	Audit/HMRC

Receipt books	7 years	Audit/HMRC
VAT records	7 years	Audit/HMRC
Tax & NI records	7 years	Audit/HMRC
Salary records	7 years	Audit/HMRC
Quotations and tenders (successful)	12 years	Statute of Limitation
Quotations and tenders (unsuccessful)	2 years	Audit/Management/Legal challenges
Contracts	12 years	Statute of Limitation
Accident Books/reports	3 years or if a child/young adult, until that person reaches the age of 21	RIDDOR (SI.1995/3163)
Insurance		
Insurance policy	Whilst valid	Audit/legal
Certificate of employer's liability	40 years from date of which insurance commenced or was renewed	The Employer's Liability (Compulsory Insurance) Regulations 1998 (SI.2753)
Certificate of public liability	21 years	Legal
Planning applications		
Minor applications with no strategic relevance	Until decided by the Planning Authority	Management
Significant/controversial applications or those with strategic relevance	Indefinite	Management/archive
Councillor information		
Declarations of acceptance	Term of Office + 1 year	Management/legal
Declarations of Interest	Term of Office + 1 year	Management/legal
Correspondence and other information		
Complaints	1 year	Management
Routine correspondence & emails with private individuals to which the Parish Council/Clerk provided a response	6 months	Management
Correspondence & emails with the County Council and District Council	Until issue is no longer of ongoing relevance	Management
Trivial correspondence/emails/circulars/ not requiring a decision/response from the Parish Council	Not retained	Not required
Human Resources		
Personnel files	6 years after ceasing employment	Management/references
Recruitment information (not appointed)	6 months	Management/for claims of unfair process
Disciplinary records	Period of employment	Management

Website		
Information relating to local organisations independent from the Council	Annual confirmation sought from each organisation that data remains accurate	Management
Completed contact forms (general)	Automatically transferred to Clerk's Parish Council email address. Copy on website deleted within one month of receipt	Management
Completed contact forms (sewerage problems)	6 years	Management – for purposes of having a record of local sewerage issues
Parish Council information – minutes, agendas, meeting papers, financial information	4 years	Guidance from Information Commissioner

Records not in the Retention Schedule

The Clerk will be responsible for reviewing any records not specifically covered by the retention schedule and for deciding when they can be destroyed or whether they should be archived for indefinite preservation.

Requests made under the Freedom of Information Act (FOIA) and Environmental Information Regulations (EIR)

As a matter of good practice, and as recommended by the Information Commissioner's Office, any requested information will be kept for at least 6 months after the date of the last communications about the request, to allow for appeals to the Information Commissioner.

Anonymous Communications

Any communication received anonymously will be reported to the Council or a relevant Committee and action taken, if appropriate. Any anonymous letter or email received will then be destroyed.

Significant Local Events and Issues

Sometimes documents are of such local significance that they are worth preserving for archive purposes even though they would normally have a shorter retention in accordance with the above retention policy. Before any records are disposed of the Clerk should consider whether they are of such local significance that they should be preserved. The Clerk will bring such records to the attention of the Parish Council in order that councillors can decide whether the records should be retained for archive purposes.

Disposal of Documents

The Parish Council is corporately responsible for ensuring that records which are no longer required are disposed of in a timely manner. The Clerk is responsible for ensuring that this disposal policy is complied with.
Unless the records contain data on an individual/s or personal data, they will be disposed of by recycling.
Any records that contain data on individual/s or personal data must be disposed of by shredding (with a cross-cutting shredder).

Councillor Responsibilities

The Clerk is responsible for storing the records of the Parish Council in accordance with this Policy. Councillors are provided with agendas, supporting papers for meetings (the Clerk's Briefing Notes) and minutes. These documents must be treated as confidential - whilst much of the information on these documents are in the public domain, certain elements, relating in particular to employees and commercial decisions may not in the public domain and should be retained securely and disposed of at the earliest opportunity.

After a councillor has left office, they must either securely dispose of all Parish Council records that they hold by shredding them (with a crosscut shredder) or must return them to the Clerk for disposal. All electronic files must similarly be securely deleted. Councillors may be required to provide formal written confirmation that the records they have held have been securely destroyed.

Archive

The Parish Council archive is held by the Aston History Group. The Clerk maintains a record of the documentation held by the History Group. These documents remain the property of the Parish Council, and the Parish Council can request that they are returned at any time.

Date Policy adopted: 7 June 2018 and reviewed on 10 June 2021.

Review due July 2025.

Agenda Item 13b - Standing Orders Revision

NALC issued revised standing orders in March 2025. The clerk has compared the revised ones to the current Parish Council standing orders. General changes:

- Enlarged print
- Page Numbers and Section Numbers have changed
- The terms 'he/she/they have been removed

Other specific changes are:

- Section 12, Draft Minutes, Para d – clerk has added in name of Parish Council.
- Section 14, Code of Conduct Complaints is now one paragraph with the following removed from the last edition:

a Upon notification by the District or Unitary Council that it is dealing with a complaint that a councillor or non-councillor with voting rights has breached the Council's code of conduct, the Proper Officer shall, subject to standing order 11, report this to the Council.

b Where the notification in standing order 14(a) relates to a complaint made by the Proper Officer, the Proper Officer shall notify the Chair of Council of this fact, and the Chair shall nominate another staff member to assume the duties of the Proper Officer in relation to the complaint until it has been determined and the Council has agreed what action, if any, to take in accordance with standing order 14(d).

c The Council may:

i. provide information or evidence where such disclosure is necessary to investigate the complaint or is a legal requirement;

ii. seek information relevant to the complaint from the person or body with statutory responsibility for investigation of the matter;

FINANCE REPORT

a. *Account balances – see below.* The cash balance in the Unity Trust current account has reduced over the last two months, and the cash requirement for July is over £4k. Therefore, it is recommended that a transfer of £7k is made from the CCLA Investment Account to the Unity Trust Current Account.

To RESOLVE to approve the transfer of £7k from CCLA to Unity Trust.

Cash Balances

Unity Trust Current Account

Balance B/F	31-Mar-25		29,592.69
Payments			
	Apr-25		(1,116.60)
	May-25		(3,392.20)
		Transfer out	(27,000.00)
	Jun-25		(2,642.94)
Income			
	Apr-25		16,533.06
	May-25		0.00
	Jun-25		0.00
Balance at	30-Jun-25		£ 11,974.01

CCLA Investment Account

Balance B/F	31-Mar-25		54,786.13
Payments			
	Apr-25		0.00
	May-25		0.00
	Jun-25		0.00
Income			
	Apr-25		209.31
	May-25	Transfer in	27,000.00
	May-25		201.68
	Jun-25	(Not yet Advised)	
Balance at 31 May 2025			£ 82,197.12
TOTAL CASH HOLDING	30-Jun-25		**£ 94,171.13**

b. *To RESOLVE to approve the following payments for the period July 2025.*

	NET	VAT	Gross Amount
E Anstee – June Pay & WFH All.	245.68		245.68
D Shenton – June Pay & WFH All.	318.00		318.00
HMRC – PAYE July	219.00		219.00
Aston Football Club – May Grass Cutting	320.00		320.00
WODC – Grounds Maint (Inv 33629356)	814.00	162.80	976.80
WODC – Waste Bin Emptying (Inv33627988)	1,088.10	217.62	1,305.72
Community Heartbeat – Defib Maintenance	165.00	33.00	198.00
Total to be decided and approved	**£3,169.78**	**£413.42**	**£3,583.20**
JOFLOWS Flooding Report for planning	375.00		375.00
Total of already approved/paid	**£375.00**	**£0.00**	**£375.00**
Monthly Standing Orders/DDs			
Lloyds Bank Card – Bank Charge £3, Microsoft £65.88	57.90	10.98	68.88
Total SDOs	**£57.90**	**£10.98**	**£68.88**
Total	**£3,602.68**	**£424.40**	**£4,027.08**

Aston, Cote, Shifford and Chimney Parish Council

2025-26		AS AT			
BUDGET	EXPENDITURE	30/06/2025	Performance Against Budget	% YTD	Commentary
£	**Staff Costs**				
£ 5,815.00	Clerk & RFO Salary - includes potential 3% payrise if PC resolves to follow the NALC/JPAG guidance.	£ 1,532.62	£ 4,282.38	26%	Run rate as per budget
£ 624.00	Clerk & RFO WFH allowance. Currently £26pm	£ 156.00	£ 468.00	25%	Run rate as per budget
£ *5,000.00*	*Clerk sickness/Overtime/Special Project Contingency*	£ 612.83	£ 4,387.17	12%	Cost likely to increase during the year
£ 1,500.00	Travel and Training (Includes RFO CILCA & ILCA)	£ -	£ 1,500.00	0%	
	Office and General Expenses				
£ 430.00	Hall Hire (Inc £7.50ph Ordish room & £16ph main hall).	£ -	£ 430.00	0%	Community Trust invoice periodically
£ 300.00	Website Costs including domain registration and renewal	£ -	£ 300.00	0%	
£ 210.00	External Audit	£ -	£ 210.00	0%	Will be billed late summer
£ 525.00	Insurance	£ 614.63	-£ 89.63	117%	Higher than anticipated, but in a three year contract
£ 144.00	Bank Charges	£ 27.00	£ 117.00	19%	
£ 1,251.60	Office costs (includes software and equipment)	£ 164.70	£ 1,086.90	13%	
£ 1,000.00	Professional Fees (contingency)	£ 375.00	£ 625.00	38%	YTD costs for flood report for planning
£ 750.00	Subscriptions (CPRE, CPO, SLCC, OALC, ICO)	£ -	£ 750.00	0%	All billed annually towards Y/E
£ 80.00	Election Expenses (estimated until WODC issue tax base)	£ -	£ 80.00	0%	
	General and Ground Maintenance				
£ 4,800.00	Grass Cutting - verges & weed killing	£ 1,184.00	£ 3,616.00	25%	Run rate as per budget
£ 2,400.00	Grass Cutting - playing field and WM	£ 320.00	£ 2,080.00	13%	YTD below budget due to weather
£ 2,611.44	Dog & Litter Bin Emptying	£ -	£ 2,611.44	0%	Billed from WODC six monthly
£ 600.00	Clock Maintenance	£ -	£ 600.00	0%	
£ 600.00	Bus Shelter Cleaning	£ 110.00	£ 490.00	18%	
£ 500.00	Defibrillator pads/batteries	£ -	£ 500.00	0%	
£ 1,500.00	Village maintenance	£ 414.00	£ 1,086.00	28%	
	GRANTS				
£ 1,115.00	Small Grants	£ -	£ 1,115.00	0%	
£ 5,535.00	General Grants	£ 570.00	£ 4,965.00	10%	
	Net VAT				
£ 37,291.04	**TOTAL**	**£ 6,080.78**	£ 31,210.26	16%	
	INCOME				
£ 31,546.76	Precept	£15,829.50	£ 15,717.26	50%	
£ 1,052.17	OCC Grass cutting Grant	£ -	£ 1,052.17	0%	Should be received soon
£ 2,200.00	Interest on CCLA Investment account	£ 410.99	£ 1,789.01	19%	
£ -	Net VAT	433.82			
£ 34,798.93	**TOTAL**	£16,674.31	£ 18,124.62	48%	
	RESERVED FUNDS				
£ 84,379.00	**TOTAL**	£ 801.22	£ 83,577.78	1%	Community Trust 50% matching