



Lytham Town Council

Document Retention and Disposal Policy

(Adopted: 29/04/2026, Review due: 29/04/2028)

1. Introduction

This policy establishes a structured, lawful, and proportionate approach to the management, retention, and disposal of Council records.

It ensures compliance with statutory obligations and supports efficient administration, including the practical management of limited email storage capacity.

2. Scope

This policy applies to all Council information, including:

- Emails (Clerk and Councillors where acting in official capacity)
- Electronic documents
- Paper records
- Minutes, agendas, and reports
- Contracts and financial records

3. Legal Framework

This policy is informed by and operates in accordance with the following legislation and guidance:

➤ **Freedom of Information Act 2000**

Provides the public right of access to information held by the Council. The Council must disclose information it holds at the time of a request, subject to exemptions.

➤ **Data Protection Act 2018 and UK GDPR**

Require that personal data is:

- Kept only as long as necessary
- Processed lawfully and securely
- Not retained indefinitely without justification

➤ **Local Government Act 1972**

Provides the legal framework for local authority administration and record keeping.

➤ **The National Archives**

Provides best practice guidance on records management and retention.

➤ **Information Commissioner's Office (ICO)**

Regulates data protection and freedom of information and provides guidance on lawful retention and disposal.

➤ **National Association of Local Councils (NALC)**

Provides sector-specific guidance and model practices for parish and town councils.

Key Legal Position

There is no requirement to retain all information indefinitely

There is a requirement to:

- Retain information appropriately
- Not delete information to avoid disclosure
- Ensure records are available when lawfully requested

NB: Routine, policy-based deletion is lawful and expected.

4. Key Principles

4.1 Records vs Transitory Information

The Council distinguishes between:

Records (which must be retained):

- Evidence of decisions
- Formal correspondence
- Financial and contractual documentation
- Complaints and legal matters

Transitory Information (which can be deleted):

- Duplicate emails
- Routine acknowledgements
- Informal or short-lived communications
- Notifications and system-generated messages

4.2 Lawful Disposal

Records will be:

- Retained only as long as necessary
- Deleted in accordance with this policy
- Disposed of routinely and not selectively

NB: Deletion is based on **classification and retention periods**, not content sensitivity.

4.3 Clerk Responsibility

The Clerk is the Council's **Records Manager** and is responsible for:

- Email management and archiving
- Applying retention rules
- Maintaining disposal logs
- Ensuring compliance

Councillors are responsible for ensuring that official communications are copied to or retained by the Clerk where appropriate.

5. Retention Schedule

Record Type	Retention Period	Action
Council Minutes	Permanent	Archive
Agendas & Reports	6 years	Delete or archive
Financial Records	6 years (minimum)	Secure disposal
Contracts	6-12 years after expiry	Secure disposal
Planning Correspondence	3-6 years	Review then delete
Complaints	6 years	Secure disposal
Routine Correspondence	2 years	Delete
Transitory Emails	Immediate or within 3 months	Delete

6. Email Management

6.1 Clerk Email System

The Clerk will:

Use Outlook/IONOS as the primary record system - utilising a .gov.uk email address.

Regularly archive important emails

Apply folder structures (e.g. by year/topic)

Conduct periodic mailbox reviews, including lawful weeding / deletion in line with this policy.

6.2 Councillor Communications

Where Councillors use personal or alternative email systems:

Official Council business must be forwarded to the Clerk where relevant

The Clerk's mailbox is treated as the primary corporate record

The Council does not require inspection of personal devices but expects cooperation in ensuring records are captured.

Councillors are reminded about ensuring that if they access Council emails via a personal device, that they are responsible for the IT security issues concerning their device.

7. Routine Disposal Process

To manage storage and compliance:

Email and document reviews will take place periodically (e.g. quarterly or as needed)

Deletions will be:

- Bulk where appropriate
- Based on retention categories
- Logged in summary form

8. FOIA Requests and Legal Hold Procedure

Once any of the following applies:

- Freedom of Information request received
- Subject Access Request received
- Complaint, audit, or legal issue identified

NB: All relevant deletion must immediately cease

The Clerk will:

Identify relevant records

Preserve them until the matter is resolved

9. Disposal Logging

A record will be kept of:

- Significant or bulk deletions
- Categories of information removed
- Date and reason

The log is a protective measure to demonstrate transparency of action, it is not a detailed inventory.

NB: Routine deletion carried out in accordance with this policy:

- ✓ Is lawful
- ✓ Is necessary for efficient administration
- ✓ Does not constitute avoidance of disclosure obligations

10. Review of Policy

This policy will be reviewed periodically, and at least once every two years, to ensure it remains effective, proportionate, and aligned with legislation and county & national guidance.

Version Control

Version	Date	Description of Change	Author
V1 DRAFT	26/03/2026	DRAFT policy written	Clerk / RFO
V1	29/04/2026	Approved by Council	Clerk / RFO