

Yeovil Without Parish Council – Data Audit

Legislation

The purpose of a data audit is to find out what data Yeovil Without Parish Council is processing, what is it used for, where it is located and who has access to it. It is an important step in assessing whether there are any risks in the type of processing the Council carries out.

Document / Activity	Personal Data Held	Purpose of Processing	Legal Basis	Storage Location	Access	Security Measures	Shared With	Retention Period	Risk Level
Staff Employment Records	Contact details, NI number, employment history	Managing employment	Legal obligation	Microsoft 365; locked files	Clerk/RFO	Password, antivirus, locked storage	Staffing Committee	6 years	Medium
Recruitment	CVs, applications	Recruitment process	Public task	Microsoft 365; locked files	Clerk/RFO	Password, antivirus	Staffing Committee	6 months	Low
Payroll & Bank Details	Bank details, payroll data	Salary payments	Legal obligation	Banking platform	Clerk/RFO	Secure banking controls	HMRC, signatories	Duration + statutory	High
Emails	Names, emails, content	Communication	Public task/contract	Microsoft 365	Clerk/RFO	Password, antivirus	Councillors, Somerset Council	6 months	Medium

Document / Activity	Personal Data Held	Purpose of Processing	Legal Basis	Storage Location	Access	Security Measures	Shared With	Retention Period	Risk Level
Councillor Applications	Contact details, statements	Appointments	Public task	Microsoft 365	Clerk/RFO	Password, antivirus	Councillors	3 months	Low
Declarations of Interest	Financial interests	Compliance	Legal obligation	Microsoft 365	Clerk/RFO	Password, antivirus	Public	Duration of office	Low
Councillor Contacts	Names, contacts	Public contact	Public task	Microsoft 365	Clerk/RFO	Password, antivirus	Public	Ongoing	Low
Planning Applications	Addresses, proposals	Consultation	Public task	Microsoft 365	Clerk/RFO	Password, antivirus	Councillors	Until decision	Low
Correspondence	Names, contact details	Enquiries	Public task	Microsoft 365	Clerk/RFO	Password, antivirus	Councillors if needed	Up to 6 months	Medium
Electoral Register	Names, addresses	Reference	Public task	Microsoft 365	Clerk/RFO	Password, antivirus	Not shared	Current year	Medium
Public Enquiries	Contact details	Communication	Public task	Microsoft 365	Clerk/RFO	Password, antivirus	Not shared	As needed	Low
Grant Applications	Contact & org details	Grant assessment	Public task	Microsoft 365	Clerk/RFO	Password, antivirus	Grant Steering group	6 yrs /1 yr (successful/ Unsuccessful)	Medium
Meeting Minutes	Decisions	Legal record	Legal obligation	Microsoft 365	Clerk/RFO	Password, secure storage	Public	Permanent	Low

Document / Activity	Personal Data Held	Purpose of Processing	Legal Basis	Storage Location	Access	Security Measures	Shared With	Retention Period	Risk Level
Contractors	Contact & contract details	Contract mgmt	Contract	Microsoft 365	Clerk/RFO	Password, antivirus	Councillors	+6 years	Medium
Financial Records	Invoices, transactions	Audit/accounting	Legal obligation	Microsoft 365	Clerk/RFO	Password, antivirus	Finance scrutiny members	6 years	Medium
Supplier Bank Details	Bank details	Payments	Contract	Banking platform	Clerk/RFO	Secure banking	Not shared	Active contract	High
Insurance	Policy details	Insurance cover	Legal obligation	Microsoft 365	Clerk/RFO	Password, antivirus	Councillors	Current + historic	Low
Allotment Tenants	Contact, agreements	Management	Contract	Microsoft 365	Clerk/RFO	Password, antivirus	Not shared	6 years	Low
Allotment Waiting List	Contact details	Allocation	Contract	Microsoft 365	Clerk/RFO	Password, antivirus	Not shared	Until removed	Low

Review Annually, or as appropriate. Data Audit completed: 26 March 2026