Appleton Parish Council

Employment Committee Terms of Reference

Approved by the Parish Council 10th October 2025

1. The Employment Committee shall consist of a minimum four parish Councillors, which will include the Deputy Chair of the Parish Council. The Committee will be supported by the Parish Clerk in their capacity as Line Manager and, where required and subject to prior agreement with the Committee Chair, the Parish Clerk's duties may be undertaken by a suitably qualified person.

2. The Chair of the Parish Council shall not be a member of the Employment Committee.

3. The Employment Committee shall be elected annually at the Annual Meeting of the Parish Council.

4. The Parish Council shall determine the number and time of the ordinary meetings of the Employment Committee and the number of these meetings shall be not less than four each year. In the event that the Chair of the Employment Committee considers that additional meetings are required, the Chair of the Committee can, subject to the prior approval each time of the Chair of the Parish Council, call a meeting as described below.

5. The Chair of the Employment Committee shall be elected annually by the Employment Committee members at the first meeting of the new Committee.

6. The quorum of the Employment Committee shall be three Parish Councillors.

7. The Employment Committee cannot approve any expenditure.

8. The Employment Committee will report to the Parish Council and provide recommendations, where appropriate, but cannot make decisions that bind the Council financially or contractually, unless delegated by Council to do so.

9. Only those Parish Councillors appointed to the Employment Committee may vote at a meeting. In the case of an equal vote, the Chair of the Committee shall have a second or casting vote.

10. All correspondence relating to Employment Committee matters generated by Committee Members, Parish Councillors and the Parish Clerk or Assistant Clerk shall be carried out using the official, secure email system in use by the Parish Council at the time.

11. The Parish Clerk or Assistant Clerk, in consultation with the Chair of the Committee shall call a meeting of the Employment Committee. Members of the Committee will receive the agenda and associated reports (agenda pack). All other Councillors will receive the agenda (only) and this will also be published.

12. The public and the press shall not attend or participate in any Part 2 items of the meetings of the Employment Committee.

13. The Parish Clerk, Assistant Clerk or suitably qualified person shall take Minutes of all meetings and the Minutes must be agreed by the Employment Committee Chair and will then, excluding any appendices, be presented to the next Council meeting. The minutes will be retained by the Parish Clerk.

14. The main matters under the remit of the Employment Committee are as follows; -

(a) To consider the terms of employment, the job descriptions and the salary scales for any employees of Appleton Parish Council and to present a final draft to the Parish Council for their consideration and approval. The Committee will take the nationally agreed terms and conditions of employment produced by the National Association of Local Councils and the Society of Local Council Clerks as the basis.

(b) As directed by the Parish Council, to advertise, select and (supported by the Clerk/Asst Clerk) interview any person(s) considered for employment by the Parish Council and to make recommendations as to the suitability of the applicant(s), to the Council on the basis of interviews conducted.

(c) Two Members of the Committee to be delegated to carry out an annual appraisal for the Clerk, and for the Committee to ensure that annual appraisals are carried out by the Clerk for all other Council employees no later than the end of March each year.

(d) To develop and monitor staff training based upon their annual appraisal objectives together with other occasions throughout the year if and when required.

(e) To consider any amendments to the Contract of Employment and Job Description as put forward by either the Parish Council, the Employee, or any professional body (NALC, SLCC, etc) and to recommend any action necessary to the Parish Council.

(f) If requested by the Parish Council, to investigate any complaint relating to any employee of the Parish Council and to prepare a written report for submission to the Parish Council. The investigation and subsequent report shall take into account the need to preserve the principle of natural justice and also be mindful of the Council's Staff Handbook, Contract of Employment and the requirements of employment legislation and dispute resolution procedures, together with the ACAS Code of Practice. The Employment Committee shall also take cognisance of the Parish Council's own Grievance Policy, Disciplinary Procedure, Code of Conduct and any other relevant Parish Council policy. If so requested by the Parish Council, The Employment Committee shall be convened as soon as possible to address any complaints.

(g) To advise the Parish Council on any process which may lead to the dismissal of staff, including matters relating to redundancy.

(h) To review health and safety for all Parish Council Employees.

(i) To maintain confidentiality at all times.

(j) To advise the Parish Council of the training and qualification requirements for the Parish Council and Staff.

(k) To work together with the Parish Clerk to monitor the ongoing implementation and effectiveness of the Appleton Parish Council Health and Safety Policy and Lone Working Policy.

15. The Parish Clerk shall be responsible for bringing any changes in legislation and good working practices to the attention of the Employment Committee for their consideration to ensure that the Parish Council procedures remain up to date and relevant.

16. The Employment Committee will generally only make recommendations to the Parish Council at the next Parish Council meeting. In exceptional circumstances the Chair of the Committee may ask The Chair of the Parish Council to call an Extraordinary General Meeting of the Parish Council.

Appleton Parish Council

Data Protection Policy as produced by Councillors Eleanor, Laurence and Richard 12/11/2025.

1. Introduction

This Data Protection Policy has been prepared to ensure that all councillors, Employees and Volunteers, who have access to and/or handle personal data associated with Appleton Parish Council (the Council), are aware of the current data protection regulations requirements. Furthermore, this policy also aims to make sure that the data subjects themselves are aware of their rights.

This policy also sets out the Council's commitment to protecting personal data and how the Council will implement that commitment.

This policy applies to all councillors, employees and volunteers working with the Council.

This policy is based upon the requirements of:-

Data Protection Act (DPA) 2018.
General Data Protection Regulation UK (GDPR) 2021.
Data Use and Access Act (DUAA) 2025.

2. Definitions

2.1. Personal Data

Personal data is information about individuals that enables them to be identified. This could include their name, address, place of work, contact information, other types of personal information, etcetera. This information could be located and stored in physical or IT based record systems.

2.2 Data handlers

Data Handlers means all Appleton Parish Councillors, Council employees and Volunteers working with The Council who are authorised to process, store or handle personal data information.

2.3 Data Controller

The Parish Council acts as Data Controller under UK GDPR and determines how personal data is collected, stored and used.

The person or persons carrying out the role of Data Controller will need to be appointed by the Parish Council.

The Parish Council is the Data Controller. The Council decides what personal information it will hold and for how long it will be used or retained. It is the Data Controller's responsibility to establish practices and policies in line with the requirements of the Act.

The Proper Officer (The Clerk) will act as the nominated officer for data protection.

2.4 Information Commissioner's Office (ICO)

The Information Commissioner's Office (ICO) is the UK's independent regulatory office for data protection and freedom of information.

2.5 Data Protection Officer (DPO)

The Data Protection Officer (DPO) is the person or persons who ensure that laws protecting personal data are being implemented within an organisation.

Parish Councils are not required to appoint a Data Protection Officer because they are not considered to be public authorities for the purposes of GDPR under the Data Protection Act 2018.

3. Appleton Parish Council is Committed to: -

- Ensuring that the Council complies with the data protection principles as set out in the current UK data protection legislation.
- Ensuring that personal data is collected only for the specified purpose and that it will be used fairly and lawfully.
- Processing personal data only to in order to meet the operational needs of the Council, or to fulfil legal requirements.
- Taking steps to ensure that personal data is up to date and accurate.
- Establishing appropriate retention periods for personal data.

- Ensuring that data subject's rights including access, rectification, erasure and data portability, can be appropriately exercised.
- Providing adequate security measures to protect personal data.
- Ensuring that a nominated officer is responsible for data protection compliance and provides a point of contact for all data protection issues.
- Ensuring that all staff are made aware of good practice regarding data protection.
- Providing adequate training for all staff responsible for personal data.
- Ensuring that everyone handling personal data knows where too find further guidance.
- Detecting, reporting and managing personal data breaches in accordance with legal requirements.
- Ensuring that queries regarding data protection, both internal and external to the Council's activities, are dealt with effectively and promptly.
- Regularly reviewing data protection procedures and guidelines within the Council.

4. The seven principles of the Data Protection Act 2018 (DPA)

4.1. Lawfulness, fairness and transparency

Personal data must be collected and processed lawfully, fairly and transparently and individuals must be told about its collection and use.

4.2. Purpose limitation

Personal data must be collected only for specified, explicit and legitimate purposes and not further processed or used in a way that is incompatible with those purposes.

4.3. Data minimisation

Personal data must be adequate, relevant and limited only to what is necessary for the processing purpose.

4.4. Accuracy

Personal data must be accurate and where necessary, kept up to date. Inaccurate or incomplete data must be corrected or deleted.

4.5. Storage limitation

Personal data must not be kept for longer than is necessary for the purposes for which it is processed.

4.6. Integrity and confidentiality

Personal data must be processed in a manner that ensures appropriate security, including protection against unauthorised or unlawful processing and against accidental loss, destruction or damage.

4.7. Accountability

The controller or processor is responsible for complying with these principles and must be able to demonstrate compliance.

5. Data Handlers Responsibilities

All Data Handlers are responsible for the safeguarding of any personal data that they come into contact with whilst carrying out their duties on behalf of Appleton Parish Council.

All Data Handlers are responsible for maintaining the confidentiality of information supplied by the public, unless the subject has given permission otherwise.

6. Storage of data

Appleton Parish Council recognises its responsibilities when it takes personal details about people. This information will be kept within the Parish Council's facilities and is not available for public access. This personal data shall be stored by the Parish Council within secure, password protected, office computer(s).

Retention of documents will be in accordance with the Parish Council's Retention Policy..

7. Subject Access Requests (SARs)

Appleton Parish Council is aware that people have the right to access any personal information that is held about them. These Subject Access Requests (SARs) must be submitted writing using hard copy or email.
In some cases the Council may need to verify the requestor's identity, or a third party's authorisation, before the request can be processed. The Council will inform the requester if there is a need for the verification together with details of the documents that the Council require to achieve this.

8. Data Breaches

GDPR defines a personal data breach as "a breach of security leading to accidental or unlawful destruction, loss, alteration, unauthorised disclosure of or access to, personal data".

Data breaches could include: -

- Access by an unauthorised third party
- Deliberate or accidental action by a data handler
- Sending personal data to an incorrect recipient
- Computer devices containing personal data being lost or stolen
- Alteration of personal data without permission
- Loss of availability of personal data

9. Reporting a Data Breach

If and when a Data Handler becomes aware of a data breach that may result in a risk to the rights and freedoms of the individual, the breach must be: -

- Reported to the Information Commissioner's Office (ICO) without delay and in any event within 72 hours of having become aware of the breach.
- Reported to affected individuals without undue delay
- Reported to the Parish Clerk or the Chair of the Council as soon as possible.

If the data breach is thought to be high-risk, affected individuals must be informed directly, explaining the breach and the steps being taken too mitigate it.

The ICO can be contacted at: -
https://ico.org.uk/fororganisations/report-a-breach

Appleton Parish Council

Appleton Parish Hall, Dudlow Green Road, Appleton, Warrington, Cheshire
WA4 5EQ
Telephone 01925 268153 Email clerk@appletonparish.gov.uk

Equality and Diversity Policy as produced by Councillors Eleanor and Richard 21/02/2026

Introduction

Appleton Parish Council is committed to creating an inclusive environment where residents, councillors, employees and volunteers are all treated with dignity and respect and are enabled to fulfil their full potential. This Equality and Diversity Policy sets out our commitment to promoting equality, valuing diversity and eliminating discrimination in line with UK legislation and best practices.

Legal Requirements

It is unlawful to discriminate against an individual on the basis of the following "protected characteristics" as defined in the Equality Act 2010: -

- age
- disability
- gender reassignment
- marriage & civil partnership
- pregnancy and maternity
- race – this includes ethnic or national origins, colour or nationality
- religion or belief – this includes lack of belief
- sex
- sexual orientation

Furthermore, Appleton Parish Council recognises that, as a Parish Council, it needs to recognise its responsibilities under the Public Sector Equality Duty (PSED) to have due regard for the need to: -

- eliminate unlawful discrimination, harassment and victimisation.
- advance equality of opportunity between people who share a protected characteristic and those who do not.
- foster good relations between people of different backgrounds.

Purpose

The purpose of this policy is to ensure that all employees, councillors, volunteers and service users have equal opportunities and are treated fairly, regardless of their protected characteristics. Appleton Parish Council opposes all forms of unlawful and unfair discrimination, whether direct or indirect, as well as harassment and victimisation.

In rare cases, different treatment may be necessary for practical or legal reasons (for example where a role has a specific requirement). In such cases the Council will ensure that any decisions made are fair and lawful.

Scope

This policy applies to all aspects of employment, volunteering, Council business and delivery of services. All employment-related decisions (including recruitment, promotion, training and remuneration) will be based upon individual skills, merit and aptitude.

The Council will ensure that everyone involved in its work is supported and encouraged to reach their full potential, helping them to make full use of available talent and to improve public service. The Council also recognises its role in ensuring that residents and service users are treated fairly and with respect when interacting with the Council and its representatives.

Our Commitment

To promote a culture of dignity, respect and inclusion in all its activities.
To provide a safe and welcoming environment for employees, volunteers, councillors and residents.
To prevent and address all forms of bullying, harassment, victimisation or discrimination.
To ensure that all the Council's relevant policies and procedures are aligned with the values set out in this Equality and Diversity Policy.
To provide training as necessary to support the understanding of equality responsibilities.

Dealing with Complaints and Grievances

Breaches of this Equality and Diversity Policy will be treated seriously and may lead to disciplinary action. Any employee who believes that they have been subjected to discrimination or harassment may raise the matter using the Council's Disciplinary and Grievance Procedures.

Roles and Responsibilities

The Parish Clerk, or in their absence, the Deputy Clerk, is responsible for ensuring compliance with this policy. Councillors are expected to uphold the principles of equality and respect in all of their dealings on behalf of the Council.

Accessability

This policy can be made available in alternative languages or formats upon request.

Policy Review

This policy will be reviewed annually by the Parish Council, or more frequently if required by changes in legislation or accepted best practice.

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Retention Policy

~~Adopted by the Parish Council on Tuesday 18th June 2024~~

Update proposed by councillors Laurance, Eleanor and Richard Feb 2026

It is impossible for the Parish Council to keep all information forever. Therefore, in line with the Parish Council's Records Management Policy it will be either destroyed or archived.

The Parish Council will only keep data for a long as it is necessary and data retention policy as follows;

General Records	**Minimum Retention Period**	**Reason/ where kept**
Signed Minutes of Parish Council meetings and Committees (Draft minutes destroyed when signed)	Indefinite	Last three years on website. Prior minutes archived at Chester Record Office.
Reports and other documents	5 years	Reviewed each year and deleted after five years.
Agendas	5 years	Reviewed each year and deleted after five years.
Draft Minutes	Destroy when Minutes approved	
Policy documentation including Standing Orders and Financial regulations	Keep current copy ~~only – all previous copies deleted.~~ Retain for at least 6 years for audit trail,,,governance and legal challenge purposes.	One drive

Councillors' Declarations of Office ~~and register of members interests~~	~~Current Parish Councillors kept only.~~ Term of office and One year	One drive
Register of members interests	Duration of Office + 1 year	One drive
Co-option applications	Deleted after successful co-option and voting papers shredded upon co-option.	One drive
Title Deeds	Indefinite	Kept in safe
Documents for legal purposes • Breach of Trust • Contract • Defamation • Leases • Negligence • Personal injury • Rent • Sums recoverable by statute • To recover land	Category Limitation period • None • 6 years • 1 year • 12 years • 6 years • 3 years • 6 years • 6 years • 12 years	
Correspondence via letter	2 years	Review and destroy after two years.
Emails – this includes all @appletonparish.gov.uk email addresses including official Parish Councillor email addresses	~~As long as relevant useful , minimum 12 months 2 months~~. Routine correspondence 2 years, relating to decisions/contracts 6 years.	Email system
Press Releases	6 years	
Public Consultation: surveys etc	5 years	
Tenancy agreements for Parish Hall	6 years	One drive
~~Contracts/leases~~	~~6 years~~	~~One drive~~
~~Formal complaints~~	~~One year~~	~~One drive~~
Safety inspections	6 years	One drive
Accident/Incident report	20 years	
Risk Asessments	3 years	

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Financial Records	**Minimum Retention Period**	**Reason/ where kept**
Audited Accounts	Indefinite	
VAT Records	6 years exceptinng 20 years for VAT on rents	
Accounting records (including VAT records)	6 years	Limitation Act 1980 (as amended)
Bank statements including paying in books/cheque books	6 years	One drive
~~Insurance Policies~~	~~Indefinite – statue~~	~~One drive~~
Van records	Valid documentation only	One drive
Quotes and tenders including unsuccessful quotes/tenders	6 years	One drive
Paid and Sent Invoices and Purchase Orders	6 years	
Payroll records	12 years	Payroll system
Petty cash, postage and telephone books	6 years	
Asset register	Indefinite	Continuously updated
Planning application correspondence received from residents	~~2 years~~ 6 years, to align for challenges period.	
Parish and Neighbourhood Plans and similar documents	As long as they are in force plus 5 years	Management

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Employment	Minimum Retention Period	Reason/ where kept
Timesheets	~~2~~3 years	One drive
Recruitment documentation and applications (unsuccessful)	~~Destroyed after appointment of post.~~6 months, unless retained by consent for future vacancies.	One drive
Recruitment documentation and applications (successful)	6 years after employment ceases	
Personnel and payroll records	~~Indefinite~~ Personnel 6 years. Payroll 12 years. (Retain pension related documents for a londer period only if necessary.	One drive
Staff appraisals	6 years after employment ceases	Management
6 years after employment ceases	12 years after benefit ends	
Health & Safety records	~~Indefinite~~ Generally 6 years minimum. Hazardous substances records (COSHH), 40 years.	One drive
Accident Reporting	20 years	Potential claims
Pension investment policies	12 years after benefit ends	Management, Legal
Records of ex-pensioners	6 years after benefit ends	Management, Legal

Insurance	Minimum Retention Period	Reason/ where kept
Certificate for insurance against liability for employees	Indefinitely	Future claims
Insurance policies/schedules	If it is possible for a claim to be made under it	Management and legal proceedings
Insurance company names and policy numbers	Indefinite	Management
Insurance Claim Records	7 years after closure (allowing for claimant to reach age of 25)	Legal, Management

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Complaints Procedure as produced by Councillors Eleanor and Richard 27/02/2026

1. Introduction

Appleton Parish Council (the Council) is committed to providing a good quality service for the benefit of the people who live and work in its area and also for visitors to the locality. If you are not satisfied with the standard of service that you have received from this Council, or you are not satisfied with an action or lack of action from this Council, this Complaints Procedure sets out how you may bring your concern to the Council and how the Council will try to resolve matters.

This Complaints Procedure applies to matters affecting Council administration and procedures and may also be used to deal with complaints about your dealings with Council employees.

2. This Complaints procedure does not apply to: -

- Complaints by one Council employee against another Council employee, or between a Council employee and the Council as employer, or between a Council employee and a councillor or ex councillor. These matters are dealt with under the Council's other procedures.

- Complaints against councillors in connection with the Council's Councillor Code of Conduct Policy. If the Council receives any complaints against a councillor, the matter will be referred to the Monitoring Officer at Warrington Borough Council. Further information on the process of dealing with complaints against councillors can be obtained from Warrington Borough Council.

- Complaints for which there is a legal remedy, or where legal proceedings already exist.

3. The Importance of Comments and Complaints

Comments and complaints are of use to the Council in that they provide an opportunity to make things right if there has been an error and to use the experience as a learning exercise to improve services and procedures in the future.

4. Complaint Definitions

A complaint is any expression of dissatisfaction, however made, about the standard of service or the actions or lack of actions by Appleton Parish Council or its employees or volunteers working with the Council.

5. How to start the complaints process

The first point of contact with the Council should be the Parish Clerk or, if that is not appropriate, the Chair of the Council. If the person making the complaint wishes and it is more appropriate or convenient to them, they may contact any of the parish councillors as their first point of contact. The councillor will then inform the Parish Clerk and/or the Chair of the Council as appropriate.

Initially, complaints can be made either verbally or in writing. However, written complaints presented in letter or email form help to prevent misunderstandings.

6. The Stages of the Complaints procedure

6.1 Day to day minor queries and comments

Problem solving, resolving queries and providing comments are part of the day to day operations of the Council and generally should not be regarded as complaints. These types of matters are routine and should hopefully be solved quickly and to the complainant's satisfaction.

If someone is not satisfied with the initial response from the Council and they wish to take the matter further, the matter should be recognised as a complaint.

6.2 Informal complaints

During the course of day to day business, minor complaints may be made to the Council. These will usually be dealt with by the Parish Clerk and Council as appropriate. Efforts should be made to deal with these problems as soon as possible, either by providing information, explaining a decision, or by instigating the appropriate action. It is not appropriate for every complaint to be treated as a formal complaint.

6.3 Formal complaints

A person or organisation may wish to make a formal complaint directly, or they may not be satisfied with the progress or outcome of an informal complaint and may wish to take the matter further. A formal complaint to the Council must be presented in writing, either in letter form, or by email, addressed to the Parish Clerk or Chair of the Parish Council as appropriate.

Once received, the formal complaint will be reported to the Finance and General Purposes Committee or to the Council, as appropriate. The Parish Clerk will also officially record the complaint.

The Parish Clerk and/or the Finance and General Purposes Committee and/or the Council will thoroughly investigate the complaint, obtaining further information as necessary from the complainant, and/or from Council employees or volunteers and/or members of the Council.

The Parish Clerk or the Chair of the Council will notify the complainant of the outcome of the complaint and of what action (if any) the Council proposes to take as a result of the complaint.

6.3.1 Timescales regarding the investigation

6.3.1.1 Acknowledgement of receipt of complaint – by return of post or email.

6.3.1.2 Notification of the results of the investigation process – within 20 working days is the target. If this period needs to be extended, the complainant will be kept informed.

6.3.2 Review of the complaint and investigation

If the complainant is not satisfied with the response from the Parish Clerk or the Chair of the Council regarding the results of the investigation, they will be advised that they have the right to have their complaint referred to the full Parish Council (as appropriate). The complainant will be notified in writing by the Parish Clerk or the Chair of the Council of the outcome of the review of the original complaint.
If the complainant is not satisfied with the Parish Clerk's or Chair's response to the investigation, they may refer their complaint to the full Parish Council. The Parish Clerk or Chair will notify the complainant in writing of the Parish Council's decision regarding the original complaint.

6.3.3 Timescales regarding referring the complaint for review by the full Parish Council

6.3.3.1 Written response by the Parish Clerk to a complainant's request to refer the matter to the full Council – within 10 working days.

6.3.3.2 Written notification of the results of the review by the Parish Council – within 8 weeks of the complainant's notification is the target. If this period needs to be extended, the complainant will be will be kept informed.

7.0 Anonymous Complaints

Anonymous complaints should be referred to the Parish Clerk or Chair of the Council as appropriate. These complaints may or may not be acted upon depending upon the type and seriousness of the allegations made.

Appleton Parish Council

Appleton Parish Hall, Dudlow Green Road, Appleton, WA4 5EQ

Telephone 01925 268153 Email clerk@appletonparish.gov.uk

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Income and Debtors Policy

~~Adopted by the Parish Council on 18th June 2024.~~ Amended by councillors Laurence, Eleanor and Richard on Feb 2026

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Introduction

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The policy outlines the Parish Council's procedures for dealing with income and debt collection.

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Parish Hall Hire

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1 ~~Credit Control~~

1.1. Invoices for Birthday party booking or ~~ah~~ad-hoc events for Hall Hire

Once the booking has been made an email with a tenancy agreement and invoice is sent to the Hall Hirer. Payment is due before the date of the Hall hire ~~date~~. If payment is not paid and the tenancy agreement is not completed a key for the Parish Hall will not be issued.

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1.2. Invoices for Parish Hall hire for regular hall users for Hall Hire

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Invoices are issued monthly at the beginning of each month for the Hall hire charge for the month of hire. Payment is due before the end of the month.

1.3. Non-payment of Parish Hall hire Invoices

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In the event of non-payment, reminders will be issued by email with a telephone call to the lead person of the group. The maximum number of reminders will be three over a period of three weeks. If payment is still not made, access to the Hall and all bookings will be cancelled until payment is received. In the event of regular non-payment Hall Hire fees will be due in advance of the booking.

In the event of nonpayment after the process above this is reported to the Finance and General Purposes Committee under an agenda item. The Finance and General Purposes Committee will then consider the size of the debt and whether to commence proceedings with the small claims court, or other means, or to seek further direction from the Parish Council. If it is not possible to recover via the small claims court or other means, then the debt will be referred to the Parish Council to consider.

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1.4. Payment of Hall Hire charges

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Payments are accepted by bank transfer only and is non-refundable.

Payment of storage fees is payable in advance as one lump sum in April for the next financial year. Any storage fee charge is added to the April's Hall hire fee. If storage is no longer required or the users cease to use the Parish Hall part way through the financial year, then storage charge for the full financial year remains payable and it is non-refundable.

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1.5. Cancellation of bookings

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Any booking will have to be cancelled in accordance with the cancellation policy, which is as follows;

If the booking is cancelled with less than three months' notice the full ~~hire~~ hall hire charge is due and payable and cannot be refunded under any circumstances.

1.6. Complaints

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Any complaints regarding the terms and condition of hire of the Parish Hall will be dealt with by the Finance and General Purposes committee on a case-by-case basis, and in accordance with the Council's complaints procedure.~~.~~

1.7. Discretion of the ~~c~~Parish Clerk~~/assistant clerk~~ or ~~d~~Deputy C~~c~~lerk

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In exceptional circumstances only, the ~~c~~Parish C,lerk/~~d~~Deputy~~/assistant c~~Clerk have the discretion to reduce or waive the hall hire fee. For example, if the class was disrupted and could not continue. This is on a case-by-case basis and any complaint/appeal subsequently will be dealt with by the Finance and General Purposes Committee. The reason and authorisation for any reduction or waive of the Hall hire fee will be recorded on the invoice.

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~~Non-payment of Parish Hall hire charges~~

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~~In the event of nonpayment of Parish Hall charges this is reported to the Finance and General Purposes Committee under an agenda item. The Finance and General Purposes Committee will then consider the size of the debt and whether to commence proceedings with the small claims court. If it is not possible to recover via the small claims court, then the debt will be referred to the Parish Council to consider.~~

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1.8. General provisions

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The General provisions as item 3 of this procedure shall also apply.

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2 Invoices issued by the Council for Issues other than Parish Hall hire

2.1. Payment of Invoices

Payments are accepted by bank transfer only.

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2.2. Unpaid Invoices

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If no-payment is received within the stated terms the recovery procedure will commence and reminders issued. Reminders may be in the form of telephone calls, emails or letters.

The maximum number of reminders will be three over a period of three weeks.

In the event of non-payment of Invoices after the reminder period the matter will be reported to the Finance and General Purposes Committee under an agenda item. The Finance and General Purposes Committee will then consider the size of the debt and whether to commence proceedings or to seek further direction from the Parish Council. If recovery is not possible through proceedings then the debt will be referred to the Parish Council to consider.

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2.3. General Provisions

The General provisions as item 3 of this procedure shall also apply

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3 General Provisions

These provisions apply to items 1 and 2 of this procedure

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3.1. Write-off and action in the case of bad debts

The Parish Council will consider any action in the case of bad debts.

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The Parish Council will seek to minimise the cost of write-offs by taking all necessary action to recover what is due. Debts will be subject to the full recovery, collection, and all reasonable legal procedures.

Write-off debt is a non-routine function which the Parish Council will decide upon only if all practical means have been exhausted. Before the Parish Council makes this decision, due diligence consideration should include the following;

- The cost of recovery against the amount owed.
- The likelihood of success of recovery.

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3.2. Procedure for write off consideration

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Any debts recommended by the cParish Clerk for write off will be initially considered by the Finance and General Purposes Committee, who will then decide any action to be taken or refer the bad debt to the Parish Council for write-off. If a debt is considered for write off a report on the debt will contain the following;

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- Copy of invoice

- Amount of debt
- Recovery history
- Reason for write-off
- Date of write off and details of the agenda item and minutes of the Parish Council meeting which gave authorisation to write off the debt.

- If the debt is subsequently repaid, the debt will be written on again to account for the sum paid.
- The reason and authorisation for the write off debts will be recorded on the invoice.

All bad debts will be accounted for at year end.

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Appleton Parish Council

Appleton Parish Hall, Dudlow Green Road, Appleton, WA4 5EQ

Telephone 01925 268153 Email clerk@appletonparish.gov.uk

Staff and Parish Councillors expenses policy

Adopted on ~~18th June 2024~~
Revised Feb 2026

Purpose

This policy sets out the rules on how employees and councillors can claim for expenses incurred in the performance of their duties for the Parish Council. The purpose of this policy is to ensure that staff and Parish Councillors are reimbursed for business expenses.

Any expenses for purchases will require a receipt. If this is not possible then the reasons why a receipt cannot be provided must be verified and countersigned by the C~~c~~lerk and Chair of the Parish Council.

All expenses will be added to the monthly payment schedule (which is approved by the Parish Council) and will be paid by bacs monthly and must be claimed within two months.

Staff Travel Expenses

Travel between home and the Parish Council Office, or other locations within the Parish boundary will not be reimbursed, unless approved by the Council for evening meetings where the Council determines such travel exceeds normal duties.

~~except for attendance at approved evening meetings or other pre-authorised work-related travel.~~

Approved travel, may include travel expenses for staff for any work-related mileage using the employees own vehicle to attend Council approved meetings or training courses outside the Parish boundary. For such approved travel, employees are able to claim travel expenses for the difference in the usual home to work costs.~~All staff can claim travel expenses for any work-related mileage and for attendance evening meetings and for attendance of training courses. Staff cannot claim mileage for travel between home and the Parish Council office.~~

Mileage expenses for approved travel ~~This~~ will be paid at the mileage rates in accordance with the staff members contract of employment. If rates are not shown in the employment contract, then rates shall be as currently set by HMRC. ~~or production~~

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~~of a receipt of rail travel.~~ The date of the mileage claim needs to be recorded on the staff claim form along with the purpose/reason for travel, number of miles claimed, rate of claim ~~(as set by HMRC)~~ and the total amount of claim.

Rail
Approved rail travel shall be for standard class rail fares only. Where possible rail journeys should be booked well in advance to beniefit from any discounts for early booking. Payable against production of receipt of rail travel

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Taxis
Any use of taxis will require prior approval and only in limited circumstances. These are :

- where taking a taxi would result in a significantly shorter travel time than using public transport;
- where there are several employees travelling together; or
- where personal security and safety of employees is an issue, for example taxis may be permitted after 9.30pm.

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Other Expenses

The Parish Council shall reimburse other pre-approved expenses which may include overnight accommodation, meals and fares incurred in the performance of Council business ("other expenses") provided that the other expenses have been receipted and approved by the Parish Council.

Parish Councillors Travel Expenses

~~All~~ Parish Councillors cannot claim travel expenses.

Parish Councillors allowances

Appleton Parish Council does not pay any Parish Councillor, including the Chair, an allowance. There is a small sum set aside in the budget called the Chair's allowance. However, this is not a lump sum payment which is made to the Chair. This is an allowance to allow payment for ahd-hoc cards and gifts by the Parish Council. The clerk as directed by the Chair and/or Parish Council can purchase ah-hoc cards and gifts with a receipt and the amount will be taken from the Chair's allowance budget. For example, this is used to purchase bereavement condolence cards or a gift for a long serving Parish Councillor who has resigned from the Parish Council.

Appleton Parish Council

Appleton Parish Hall, Dudlow Green Road, Appleton, WA4 5EQ

Telephone 01925 268153 Email clerk@appletonparish.gov.uk

Finance and General Purposes Committee - Terms of Reference produced by councillors Eleanor and Richard 12.02.2026

Adopted by the Parish Council on xx/xx/xxxx

1. The Finance and General Purposes Committee (F&GP Committee) shall consist of a minimum of six members including the non-voting Parish Clerk in their capacity as Responsible Financial Officer, the Parish Council Chair and Deputy Chair, and a minimum of three other Parish Councillors. The Chair and Deputy Chair of the Parish Council are ex-officio members of the Committee and have full voting rights.

2. The F&GP Committee together with the Chair and Deputy Chair of the Parish Council will be elected annually at the Annual Meeting of the Parish Council in accordance with Standing Orders.

3. The Parish Council shall determine the number and time of the ordinary meetings of the F&GP Committee and the number of these meetings shall be not less than ?? each year. In the event that the Chair of the F&GP Committee, or other members of the Committee, considers that additional meetings are required, these will be called in compliance with Standing Orders.

4. The quorum of the Committee shall be three members.

5. The Clerk/Deputy Clerk will call a meeting of the Committee and send out the agenda to all Parish Councillors.

6. The Clerk/Deputy Clerk will take Minutes of all meetings and the Minutes must be agreed by the Parish Council. These Minutes are a public document and will be published.

7. The main areas under the remit of the Finance and General Purposes Committee are as follows:

1) to monitor the budget and review the Finances of the Parish Council with the Responsible Financial Officer/Deputy Clerk on a quarterly basis;

2) to make recommendations on expenditure to the Parish Council;

3) to approve the banking reconciliation statements prior to submission to the Chair of the Parish Council and the Parish Council.

4) to review the budget annually in respect of budget setting for the following year and to make recommendations to the Parish Council;

5) to consider the parish precept annually and make recommendations to the Parish Council;

6) to examine the internal and external auditors reports and make recommendations as appropriate;

7) to consider all financial requests to the Parish Council, including grant requests. All grant requests can only be recommended by the F&GP Committee. Only the full Parish Council can approve grant applications;

8) to consider ad hoc financial requests throughout the year;

9) to consider all matters relating to the Parish Hall maintenance;

10) to review the overall management of the Parish Hall and make decisions on the operational running of the hall.

11) to review the Parish Assets and make recommendations as appropriate.

12. to review new or proposed revisions/updates to Parish Council procedures and Terms of Reference, prior to submission to the Parish Council.

8. Finance and General Purposes Committee members can approve expenditure as follows;

8.1 Revenue Items (any amount)

8.2 Capital Items (up to the value of £5,000).

9. All expenditure authorised by the Finance & General Purposes Committee will be advised to the full parish council at it's next meeting.

10. The Finance and General Purposes Committee cannot approve any expenditure for any other committee or working party. Any expenditure that needs to be approved for any other committee or working party must be made by the Parish Council.

11. The Finance and General Purposes Committee is not responsible for decisions or expenditure related to the South Warrington Local Plan group. Such decisions regarding the South Warrington Local Plan group must be made by the Parish Council.

12. The Finance and General Purposes Committee cannot approve any expenditure for training courses. All training requests must be approved by the Parish Council.

13. The Finance and General Purposes Committee can approve any banking matters or arrangements including authorised persons for banking and bank transfers.

14. The Clerk will be responsible for bringing any changes in legislation/good working practices to the attention of the Committee for consideration thus ensuring that the Parish Council procedures are up to date and relevant.

Appleton Parish Council

Appleton Parish Hall, Dudlow Green Road, Appleton, Warrington,
Cheshire WA4 5EQ

Telephone 01925 268153 Email clerk@appletonparish.gov.uk

Planning Committee Terms of reference as produced by councillors Eleanor and Richard 12.02.2026

Adopted by the Parish Council on xx.xx.xxxx

1. The Planning Committee has delegated responsibility and authority to respond to planning applications on behalf of the Parish Council. The Planning Committee has no power to approve any expenditure or deal with any matter other than decide on planning applications.

2. The Planning Committee shall consist of a minimum of 3 Parish Councillors.

3. The quorum of the Planning Committee is three Parish Councillors or one third of the total membership of the Committee, whichever is the greater.

4. Only those appointed may vote at a meeting. In the case of an equal vote, the Chair shall have a second or casting vote. If any member of the Planning Committee meeting cannot be present, then the committee member may nominate a substitute in their absence. Confirmation of this substitute must be sent in writing to the Clerk.

5. Any apologies for absence must be emailed in writing to the Clerk at least two hours prior to the meeting. Apologies by any other method will not be recorded in the minutes.

6. The Clerk/Deputy Clerk will call a meeting of the Committee and send out the agenda to all Parish Councillors.

7. The Clerk/Deputy Clerk will take Minutes of all meetings and the Minutes must be approved by the Parish Council These Minutes are a public document and after approval, will be published on the Parish Council's website.

8. Appleton Parish Council is consulted on all planning applications in Appleton, but Warrington Borough Council, not the Parish Council, makes the decisions.

9. The Planning Committee meetings are generally held prior to the monthly Parish Council meetings which are held at 7pm. In addition, because of the 21 day deadline for the Parish Council's response to the Borough Council on a planning application, ad hoc meetings will be held, as required, between Parish Council meetings, in compliance with Standing Orders.

10. The Planning Committee discusses planning applications, considers any objections received from members of the public and makes comments, observations, and sometimes formal objections. If there is a need, the Planning Committee visits a site before coming to an opinion.

11. The Clerk records the decision of the Planning Committee on planning applications. These are then submitted to Warrington Borough Council for their consideration.

12. The decision of the Planning Committee on every planning application is then recorded in the Planning Committee minutes accordingly.

13. All Parish Councillors are responsible for declaring any interest in relation to any planning application. Where a Parish Councillor declares an interest, they will take no part in the discussions, or decision relating to that individual planning application and leave the room.

14. All the meetings of the Planning Committee are open to the public, providing them with the opportunity to express their views under public participation.

15. The Planning Committee can object to a planning application and request that it is heard by the Development Management Committee of Warrington Borough Council. This is a public meeting held by Warrington Borough Council at which the objectors and proposers can speak if they register to speak in advance.

16. Once a decision on a planning application has been made, this is final and cannot be amended unless a new planning application or amendment is issued by Warrington Borough Council.

17. Certain planning applications are information only. These will be listed on the agenda for the Planning Committee meetings. However as these are for information only, the Parish Council cannot make any comments.

Appleton Parish Council

Appleton Parish Hall, Dudlow Green Road, Appleton, WA4 5EQ

Telephone 01925 268153 Email clerk@appletonparish.gov.uk

Adopted by the Parish Council on xx/xx/xxxx

Policy for the awarding of grants

Set out below are the aims and conditions of grant aid to local organisations by Appleton Parish Council

Who can apply?	Voluntary and community groups and organisations within the parish of Appleton and/or benefit residents of Appleton.
What can it be used for?	• To benefit the Parish as a whole or a significant number of residents. • To enable local people to participate in voluntary groups and activities • To help voluntary and community groups benefit community life. • To ensure the provision of services, needed by the Appleton residents, via the voluntary sector • To support organisations which meet the needs of people experiencing social and economic difficulties. • To ensure that there is equality of access for all residents to the services the applicant provides. • To improve or enhance the local environment.
What/who is excluded from applying to the grant scheme?	• Organisations that do not provide a service to the community of Appleton. • General national appeals or charities • Statutory organisations • Political groups or activities promoting political beliefs • Religious groups or the promotion of religious beliefs unless for the purposes of maintaining buildings or items which are part of the local heritage.

	• Arts & sports projects with no community or charitable element. • Retrospective applications

How often can the same organisation apply?	• Not more than once for the same project or activity in the same year
General principles	• Assistance will be given on the basis of need, merit, contribution to the local community and availability of funds • Applicants must clearly show how any assistance given will benefit the people or the environment in the parish. • There can be no presumption that funding will continue on a year to year basis, nor that making an application means any grant will be made.
General points	• Upon completion of the project the Council requires a written statement of how the grant was used. • Applications demonstrating support from other organisations will be more likely to succeed • Where applicable the Council should be given credit for supporting the project. • Payments can only be made to organisations or partnerships not to individuals. • The Parish Council requires copies of the following; • Copies of the last accounts which have been audited (if the accounts require auditing) • Copies of the last three months of bank statements for all the accounts that the organisation holds. Please note that additional information may also be required. • Unspent monies must be returned to the Council.

	• All information and supporting documentation will be circulated to all members of the Parish Council.
Process	Any organisation can apply for a grant by completion of this application form. Once all the supporting documentation has been supplied all grants received will be considered four times a year in June (closing date 15th May), September, (closing date 15th August), December (closing date 15th November) and March (closing date 15th February) unless there are exceptional circumstances. To determine what is an exceptional circumstance, any grant applications received will be advised to the Finance and General Purposes Committee monthly. If considered an exceptional circumstance, a decision will be made the following month. All grant applications received (with the supporting documentation) will be considered by the Finance and General Purposes Committee for them to make a recommendation or to request further information before consideration by the Parish Council.

Appleton Parish Council

Grants Application Form

Project title:		
Organisation's Name: **Applicant's Name:** Address:		
Telephone	Mobile	e-mail

Estimated cost of project:

Description	Materials	Labour	Total
Sub-total			
VAT (if applicable)			
TOTAL			£

Details of contributions from other organisations?	£
Total amount of grant applied for	£

Project Description: *Please set out what your project aims and objectives are as clearly as possible – you may continue on a separate sheet if necessary* Please supply a copy of your Audited accounts and copies of the last three months of bank statements for all the accounts that the organisation holds. Please note that additional information may also be required.	
Signed on behalf of the applying organisation:	
Dated:	Position:
When you have read the attached policy and completed the Application Form please return it to the Clerk to the Council, Appleton Parish Council, Appleton Parish Hall, Dudlow Green Road, Appleton WA4 5EQ	

Appleton Parish Council

Appleton Parish Hall, Dudlow Green Road, Appleton, WA4 5EQ

Telephone 01925 268153 Email clerk@appletonparish.gov.uk

Financial Reserves Policy prepared by councillors Eleanor and Richard 16.02.2026

Adopted at the Parish Council meeting on xx/xx/xxxx

1. INTRODUCTION AND PURPOSE

This policy describes how Appleton Parish Council manages and maintains financial reserves to ensure sound financial management and long-term financial stability.

Maintaining appropriate financial reserves enables the Parish Council to; -

- Manage financial risk and unforeseen expenditure
- Maintain adequate working capital
- Plan for future capital investment
- Smooth out the impact of uneven income and expenditure
- Reduce fluctuations in the annual precept

2. SCOPE

This policy applies to all of the financial reserves held by Appleton Parish Council. This policy must be followed by the Parish Clerk and RFO, the Deputy Clerk and any other relevant employees and Parish Councillors.

This policy covers both **General Reserves** and **Earmarked Reserves.**

3. THE LEGAL FRAMEWORK

The Local Audit and Accountability Act 2014 and the Local Government Act 1972 are the primary sources of legislation governing the ways in which a parish council manages its financial affairs. Governance and Accountability for Smaller Authorities (the Practitioners Guide) provides local councils with guidance (some mandatory) for financial management and outlines the information required by the external auditor. The Financial Regulations and Standing Orders of the council provide further guidance

Appleton Parish Council is required by statute to maintain financial reserves sufficient to meet the needs of the organisation and in addition has statutory limitations on how it spends certain receipts which it must ensure are accounted for separately to the council's general funds.

Whilst there is no statutory minimum (or maximum) level of reserves, the Parish

Council has no power to hold revenue reserves other than those for reasonable working capital needs or specific earmarked purposes.

The Parish Council's Internal and External Auditors review the adequacy and justification of the Parish Council's reserves as part of the annual audit process.

This policy sets out how Appleton Parish Council will manage its reserves and is separate to the Parish Council's Investments Policy which sets out how the council will hold its reserves.

4. EXPENDITURE FROM THE RESERVES

A decision to set up a reserve budget must be made by the Parish Council.

Expenditure from reserves must be authorised by the Parish Council.

The Parish Council maintains two types of reserves as follows: -

4.1 General Reserves

General Reserves represent the Parish Council's working balance and provide financial resilience for unforeseen expenditure.

These General Reserves may be used to; -

- manage cash flow
- Cover unexpected expenditure
- Provide emergency funding

The Joint Panel on Accountability and Governance Practitioners' Guide recommends that General Reserves should normally be between three and twelve months on net revenue expenditure.

For the size of Appleton Parish Council at this time, the Councill aims to maintain General Reserves at approximately three months (i.e. 25%) of annual net revenue expenditure.

The Parish Council will review the General Reserves position during the annual budget process.

4.2 Earmarked Reserves

The Parish Council may establish Earmarked Reserves for specific purposes where it reasonably believes it may incur expenditure in the future.

These Earmarked Reserves enable the Parish Council to: -

- Plan for significant future expenditure
- Reduce the impact on the annual precept
- Manage financial risk
- Fund capital projects

Where the provision of an Earmarked Reserve becomes obsolete, or where there is an overprovision of funds, the excess may, subject to the approval of the Parish Council, be transferred to other budget headings within the revenue budget, or to General Reserves, or to one or more of the Earmarked Reserves.

5. CREATION OF NEW EARMARKED RESERVES

The creation of a new Earmarked Reserve must be approved by resolution of the Parish Council

The decision should specify: -

- The purpose of the reserve
- The method of funding
- Any planned annual contributions

6. USE OF RESERVES

Expenditure from reserves must be authorised by The Parish Council.

Funds held in Earmarked Reserves may only be used for the purpose for which they were established, unless the Parish Council agrees otherwise.

7. TRANSFERS BETWEEN RESERVES

The Responsible Financial Officer will maintain a **Reserves Schedule** showing: -

- Opening balances
- Contributions to reserves
- Expenditure from reserves
- Closing balances

8. EXISTING EARMARKED RESERVES (Status for tax year 2025/2026)

Elections earmarked reserve

This is a reserve to cover the cost of by-elections. The Parish Council may determine to lower the reserve immediately before/after ordinary election years where the likelihood of a by-election is lower.

Parish Hall earmarked reserve

This is a reserve for capital works and renovation works for the Parish Hall.

Youth Work earmarked reserve

This is a reserve for youth projects.

Parish Ranger Van replacement earmarked reserve

The Parish Council purchased a new electric van in 2024 and each year amounts will be added to this reserve in order purchase a replacement in the future.

Environmental Improvement schemes earmarked reserve

This is a reserve for investments for any environmental improvements.

Community Scheme/ consultant costs for Local Plan

This is a reserve for use for Planning Consultants and for utilising advice in relation to matters associated with, or arising from the Local Plan, such as large developments in the area. For example, costs in relation to the South Warrington Local Parishes group.

Legal advice regarding employment earmarked reserve

This is a reserve to utilities funds for employment advice and assistance.

Air Quality monitors earmarked reserve

This is a reserve for the installation of air quality monitors.

Public Health earmarked reserve

This is a reserve for investments in public health issues.

Public Amenity earmarked reserve

This is a reserve for investments in public amenities.

Review and variation to policy

This policy will be reviewed periodically and may be subject to variations and additions.

9. TRANSPARENCY

Information about the Council's reserves will be reported in: -

- The annual budget accounts
- The Council's accounts
- The Annual Governance and Accountability Return (AGAR)

This ensures transparency and accountability to residents and stakeholders.

10. ANNUAL REVIEW OF RESERVES

The Council will undertake a formal review of its reserves each year as part of the budget setting process.

This review will consider: -

- The adequacy of the General Reserve
- The purpose and balance of each Earmarked Reserve
- Planned capital expenditure
- Financial risks and liabilities

Following this review, the Council will approve a **Reserves Schedule** to support the budget.

11. REVIEW AND VARIATIONS TO POLICY

This policy will be reviewed periodically and may be subject to variations and additions.

Appleton Parish Council

Appleton Parish Hall, Dudlow Green Road, Appleton, WA4 5EQ

Telephone 01925 268153 Email clerk@appletonparish.gov.uk

Investment policy and investment strategy

Adopted by the Parish Council on Tuesday 15th July 2025 – Reviewed March 2026

1. Introduction

This Strategy has been produced in accordance with the guidance issued by the Secretary of State for the Department for Communities and Local Government under Section 15(1) (a) of the Local Government Act 2003.
This guidance applies to parish councils and charter trustees, providing their total investments exceed or are expected to exceed £100,000 at any time during the financial year. Where a parish council or charter trustee expects its total investments to be between £10,000 and £100,000, it is encouraged to adopt the principles in this guidance.

2. Investment Objectives

The Parish Council's investment priorities are the security of reserves and liquidity of its investments. The Council will aim to achieve the optimum return on its investments commensurate with proper levels of security and liquidity. All investments will be made in sterling. The Department for Communities and Local Government maintains that borrowing of monies purely to invest, or to lend and make a return, is unlawful and this Parish Council will not engage in such activity. Where external investment managers are used, they will be contractually required to comply with the Strategy.

3. Specified Investments

Specified Investments are those offering high security and high liquidity, made in sterling and which mature in no more than a year.
For the prudent management of its treasury balances, maintaining sufficient levels of security and liquidity, Appleton Parish Council will use;

- Deposits with banks, building societies, local authorities or other public authorities.
- Other approved public sector investment funds.

4. Non-Specified Investments

These investments have a greater potential risk, such as investment in stocks and shares the Parish Council will not participate in such investments, which are considered not to offer the level of security and liquidity required.

5. External Borrowing Strategy

The Parish Council acknowledges the importance of borrowing funds and the financial impact on the Council and the local community. The Council will agree borrowing for specific capital projects (as defined in section 16 of the 2003 Act), and gain approval for borrowing by sending an application to the National Association of Local Councils (NALC). All borrowings must be approved by full Council. The Parish Council will ensure the following criteria when considering requesting a borrowing approval:

- The borrowing should only be used for the purpose of Capital expenditure as defined by Section 16 of the Local Government Act 2003.
- Any unallocated balances including, where appropriate capital receipts beyond those required for the prudent financial management of the council, should be used in the project for which the borrowing is required.
- The Parish Council should have a realistic budget for the servicing and repayment of the debt, considering the future effect on the council's precept and cash flow.
- The Council must not mortgage or charge any of its property as security for money borrowed.

The Parish Council will pursue the best possible terms when borrowing but will generally use the Public Works Loan Board (PWLB). The Parish Council considers that the fixed term rates offered by the PWLB are relatively inexpensive and that PWLB loans are most likely to offer stability for the financial planning of the council. The Parish Council will determine the period of each loan which should not exceed the period for which the expenditure is forecast to provide benefit to the Council i.e. useful life of the asset.

6. Governance and Risk

There will be due regard to the Financial Services Compensation Scheme and the Parish Council will aim to spread 'specified investments' over a range of different providers in such a way as to limit exposure and minimise risk.
The Responsible Finance Officer (RFO) in consultation with the Finance and General Purposes Committee will determine the maximum periods for which funds may prudently be committed so as not to compromise liquidity.

The Parish Council will monitor the yield on investments by having regard to the general financial, economic and political environment nationally.

All resolutions relating to investments will be noted in the minutes.

7. Review and Amendment

The Parish Council's investment position will be reviewed regularly by the Responsible Financial Officer and reported to the Full Council for consideration. This Investment Strategy will be reviewed annually.

The Parish Council reserves the right to make variations to the Strategy at any time, subject to the approval of the Parish Council. Any variations will be put in the Parish Council minutes.

✅ Safest Governance Approach for the Parish Council

To minimise liability and demonstrate proper governance, the Council should take the following structured approach:

---

1 Immediate Risk Control

- Arrange a **visual safety inspection** of the fence as soon as possible.
- Record:
  - Condition,
  - Stability,
  - Height,
  - Fixings,
  - Any sharp edges or hazards.
- Photograph it.

This shows the Council has acted promptly once aware of the structure.

---

2 Clarify Legal Position

Confirm formally that:

- The fence is on Parish Council land.
- It was installed without Council permission.
- The Council has not adopted it as a Council asset.

This avoids implied acceptance.

---

3 Decide on One of Three Clear Positions

The Council must make a formal resolution choosing one option:

Option A – Require Removal (Lowest Long-Term Risk)

- Write to the resident requiring removal within a specified period.
- If not removed, Council removes it and recovers costs.

◆ Cleanest liability position.

Option B – Conditional Retention (Controlled Risk)

- Inspect and approve the fence formally.
- Pass a resolution adopting it as a Council asset.
- Add it to asset register.

- Include it in inspection regime.
- Confirm insurance cover.

◆ Practical if the fence is acceptable.

Option C – Licence Agreement (If Fence Benefits Resident)

- Require a formal licence agreement.
- Make resident responsible for maintenance and indemnify the Council.
- Keep inspection rights.

◆ Useful if fence primarily benefits the adjoining property.

---

4 Insurance Notification

The Clerk should:

- Notify the Council's insurer that an unauthorised structure has been installed.
- Confirm cover position.
- Record insurer advice.

This protects councillors personally.

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5 Record Everything

Minutes should clearly show:

- The Council was aware,
- The Council assessed risk,
- The Council made a reasoned decision.

This is critical for defending any future claim.