

### Your Account Statement

unity trust bank

For Businesses. For Communities. For Good.

Unity Trust Bank plc PO Box 7193 Planetary Road Willenhall WV1 9DG

Mr Stephen Edwards Abertillery And Llanhilleth Community Council Abertillery & Amp Llanhilleth Community Council Mitre Street Abertillery NP13 1AE

Date: 31/10/2025

Account Name: Abertillery And Llanhilleth

Community Council

Swift Code (BIC): NWBKGB2L

IBAN Number: GB93NWBK60023571418024

Sort Code: 608301

Account Number: 20490124

The credit interest rate is 2.25% AER as of your statement date.

#### **Contact Us**

Call us: 0345 140 1000

🖾 Email us: us@unity.co.uk

Wisit us: unity.co.uk

Go Paperless! Receive your statements online and we'll notify you by SMS or email when they're available to view. Simply log into Your Online Banking and update your statement preferences or give us a call on 0345 140 1000



For eligible organisations, your deposits held with Unity Trust Bank are protected up to £85,000 under the Financial Services Compensation Scheme (FSCS). For more information about eligibility and compensation provided by the FSCS, please visit: FSCS.org.uk or refer to our FSCS Information Sheet and Exclusions List at unity.co.uk/fscs

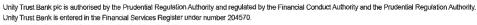
		Your Instant Access a	ccount transactio	ns:	
Date	Туре	Details	Payments Out	Payments In	Balance
30/09/2025		Balance brought forward	£0.00	£0.00	£65,001.54
13/10/2025	Transfer	Transfer to 20490111	£926,40	£0.00	£64,075.14



Statement number 025

Page number 1 of 2





Registered Office: Four Brindleyplace, Birmingham, B1 2JB.

Registered in England and Wales no. 1713124.

Calls may be monitored and recorded for training, quality and security purposes.

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#### Sending or Receiving Currency

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Unity Trust Bank plc is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority Unity Trust Bank is entered in the Financial Services Register under number 204570. For Communities. Registered Office: Four Brindleyplace, Birmingham, B1 2JB. Registered in England and Wales no. 1713124.

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Date: 04/11/2025

Councillor 2:

#### **Abertillery & Llanhilleh Community Counc Current Year**

Time: 10:33

#### Bank Reconciliation Statement as at 31/10/2025 for Cashbook 5 - Unity Trust Reserve

Page 1

User: STEVE

Bank Statement Account Name (s)	Statement Date	Page No	Balances
Unity Reserve Account	31/10/2025	1	64,075.14
		:	64,075.14
Unpresented Payments (Minus)		Amount	
		0.00	
		<u></u>	0.00
			64,075.14
Inpresented Receipts (Plus)			
		0.00	
		_	0.00
			64,075.14
	Balance p	er Cash Book is :-	64,075.14
		Difference is :-	0.00
Councillor 1:			
Name FRANKIE BAKEK	Signed #B	Date !	1.111115

Councillor 2:

Name LUCY HARMER signed Supplement Date 14/11/25.

Date: 04/11/2025

#### Abertillery & Llanhilleh Community Counc Current Year

Bank Reconciliation up to 31/10/2025 for Cashbook No 5 - Unity Trust Reserve

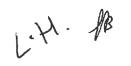
Page 1

Time: 10:33

User: STEVE

<u>Date</u> 13/10/2025	Cheque/Ref EMR/OWL	<u>Amnt Paid</u> 926.40	Amnt Banked	<u>Stat Amnt</u> 926.40	Difference	Cleared	Payee Name or Description Unity Trust Current
		926.40	0.00				
Cour	ncillor 1: e FRANK	IE BALER	Signe	ed Mr.			Date 14/11/25
Cour	ncillor 2:						
Name	e		Signe	ad			Date







# Statement of Account

ABERTILLERY AND LLANHILLETH COMMUNITY COUNCIL Council Offices Mitre Street Abertillery NP13 1AE

5 November 2025

Account name:

ABERTILLERY AND LLANHILLETH COMMUNITY COUNCIL

Account number: Statement period: PS1007935-001

30/09/2025 to 31/10/2025

### Account summary

Total valuation as at 31 October 2025 Total valuation as at last statement at 30 September 2025 £107,030.58 £106,677.71

### Holdings as at 31 October 2025

Fund name	Unit/share holdings	Price per unit/share	Value
Public Sector Deposit Fund SC4 - Public Sector GB00B3LDFH01	107,030.5800	£1.00	£107,030.58

Total value £107,030.58

Transactions for the period from 30 September 2025 to 31 October 2025

#### **Public Sector Deposit Fund SC4 - Public Sector**

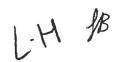
Transaction date	Transaction type	Unit/shares	Price per unit/share	Amount (GBP)
02/10/2025	Income Reinvestment	352.8700	£1.0000	£352.87

Correspondence address: PO Box 12892, Dunmow, Essex CM6 9DL

clientservices@ccla.co.uk

Freephone 0800 022 3505

www.ccla.co.uk



The average Fund yield for this period was 4.01% p.a.

Income for the period is as follows:

Month	Date paid	Method	Amount (£)	Destination	
Oct 2025	04/11/2025	Reinvestment	£364.17	PS1007935-001	

All CCLA forms are available on our website: **www.ccla.co.uk/resources/client-documentation**. Please ensure that you download and use the latest available form to make any transaction or amendment. Using an old form will result in the instruction being rejected.

Before making any additional investments into CCLA funds, please read the most recent version of the relevant fund's key information document (KID). KIDs can help investors understand the nature, risks, costs, potential gains and potential losses of fund, and compare the fund with other products. The KIDs for our funds are available in the investments section of our website at, www.ccla.co.uk. Or, you can ask us to send you copies, free of charge, by emailing our Client Services team at clientservices@ccla.co.uk.

Please keep all documents (including this statement) safe as you may need to refer to the information in the future.

If you would like to discuss any of the information on your statement please contact Client Services.

A glossary of terms used in this communication is available on **www.ccla.co.uk/glossary**. If you would like the information in an alternative format or have any queries, please call us on **0800 022 3505** or email us at **clientservices@ccla.co.uk**.

Date: 06/11/2025

#### **Abertillery & Llanhilleh Community Counc Current Year**

User: STEVE

Page 1

Time: 09:29

Bank Reconciliation up to 31/10/2025 for Cashbook No 6 - CCLA

Date	Cheque/Ref	Amnt Paid	Amnt Banked	Stat Amnt	<u>Difference</u> <u>Cleared</u> <u>Payee Name or Description</u>
02/10/2025	Interest		352.87	352.87	R Receipt(s) Banked
		0.00	352.87		

Councillor 1:

Name FRANKIE BAKER Signed #

Date 14/11/2S

Councillor 2:

Name LUCY HARMER Signed Juyhamer Date 14/11/25



Date:06/11/2025

#### Abertillery & Llanhilleh Community Counc Current Year

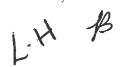
Time: 09:29

# Bank Reconciliation Statement as at 31/10/2025 for Cashbook 6 - CCLA

Page 1

User: STEVE

Bank Statement Account Name (s)	Statement Date	Page No	Balances
CCLA	31/10/2025		107,030.58
		-	107,030.58
Unpresented Payments (Minus)		Amount	
		0.00	
		_	0.00
			107,030.58
Unpresented Receipts (Plus)			
		0.00	
		_	0.00
			107,030.58
	Balance p	oer Cash Book is :-	107,030.58
		Difference is :-	0.00
Councillor 1:			
Name FRANKIE BAKER	Signed#B	Date !	4/11/25
Councillor 2:	1		
Name LUCY HARMER.	Signed XUIII	aymev Date	4/11/29
•			-



### **Your Account Statement**

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Mr Stephen Edwards Abertillery And Llanhilleth Community Council Abertillery &Amp Llanhilleth Community Council Mitre Street Abertillery NP13 1AE

Date: 31/10/2025

Account Name: Abertillery And Llanhilleth

Community Council

Swift Code (BIC): NWBKGB2L

IBAN Number: GB93NWBK60023571418024

Sort Code: 608301

Account Number: 20490111

Your arranged overdraft limit is £0.00

Go Paperless! Receive your statements online and we'll notify you by SMS or email when they're available to view. Simply log into Your Online Banking and update your statement preferences or give us a call on 0345 140 1000



For eligible organisations, your deposits held with Unity Trust Bank are protected up to £85,000 under the Financial Services Compensation Scheme (FSCS). For more information about eligibility and compensation provided by the FSCS, please visit: FSCS.org.uk or refer to our FSCS Information Sheet and Exclusions List at unity.co.uk/fscs

#### **Contact Us**

Call us: 0345 140 1000

Email us: us@unity.co.uk

Wisit us: unity.co.uk

		Your Current T2 acco	ount transactions:		ALTERNATION OF THE SECOND
Date	Туре	Details	Payments Out	Payments In	Balance
30/09/2025		Balance brought forward	£0.00	£0.00	£49,986.42
01/10/2025	Direct Debit	Direct Debit (GRENKELEASING LIMI)	£35.68	£0.00	£49,950.74
01/10/2025	Credit	BGBC MAIN A/C	£0.00	£217,011.50	£266,962.24
03/10/2025	Direct Debit	Direct Debit (GRENKELEASING LIMI)	£200.66	£0.00	£266,761.58

Page number 1 of 4

Statement number 029

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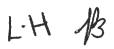
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Your Current T2 account transactions:							
Date	Туре	Details	Payments Out	Payments In	Balance		
03/10/2025	Faster Payment Debit	B/P to: Misco	£926.40	£0.00	£265,835.18		
03/10/2025	Faster Payment Debit	B/P to: Mr Andrew J Sheehy	£475.00	£0.00	£265,360.18		
03/10/2025	Faster Payment Debit	B/P to: Mr Andrew J Sheehy	£270.00	£0.00	£265,090.18		
03/10/2025	Faster Payment Debit	B/P to: BrynithelCommunity	£12.00	£0.00	£265,078.18		
03/10/2025	Faster Payment Debit	B/P to: City Illuminations	£386.40	£0.00	£264,691.78		
03/10/2025	Faster Payment Debit	B/P to: One Voice Wales	£130.00	£0.00	£264,561.78		
03/10/2025	Faster Payment Debit	B/P to: Blachere Illuminat	£14,685.34	£0.00	£249,876.44		
13/10/2025	Transfer	Transfer from 20490124	€0.00	EMR £926.40	£250,802.84		
14/10/2025	Faster Payment Debit	B/P to: Awen	£6,883.02	£0.00	£243,919.82		
14/10/2025	Faster Payment Debit	B/P to: BGCBC	£28,846.77	£0.00	£215,073.05		
14/10/2025	Faster Payment Debit	B/P to: Mathew Williams	£100.00	£0.00	£214,973.05		
14/10/2025	Transfer	B/P to: SLCC	£18.00	£0.00	£214,955.05		
14/10/2025	Faster Payment Debit	B/P to: Lawson Jones	£196.20	£0.00	£214,758.85		
14/10/2025	Faster Payment Debit	B/P to: BGCBC	£28,846.77	£0,00	£185,912.08		
14/10/2025	Faster Payment Debit	B/P to: BGCBC	£21.45	£0.00	£185,890.63		
14/10/2025	Faster Payment Debit	B/P to: Marianne Green	£111.77	£0.00	£185,778.86		
14/10/2025	Faster Payment Debit	B/P to: One Voice Wales	£65.00	£0.00	£185,713.86		
14/10/2025	Faster Payment Debit	B/P to: BGCBC	£96.46	£0.00	£185,617.40		
14/10/2025	Transfer	B/P to: SLCC	£78.00	£0.00	£185,539.40		
15/10/2025	Direct Debit	Direct Debit (GRENKELEASING LIMI)	£168.00	£0.00	£185,371.40		
15/10/2025	Direct Debit	Direct Debit (DWR CYMRU WELSH WA)	£93.14	£0.00	£185,278.26		
16/10/2025	Direct Debit	Direct Debit (LLOYDS BANK PLC)	£3.00	£0.00	£185,275.26		
20/10/2025	Faster Payment Debit	B/P to: Lyn Maloney	£20.49	£0.00	£185,254.77		
20/10/2025	Faster Payment Debit	B/P to: Mr Andrew J Sheehy	£95.00	£0.00	£185,159.77		

Page number 2 of 4

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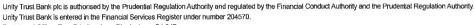
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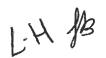
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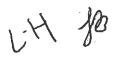




Date	Туре	Details	Payments Out	Payments In	Balance
20/10/2025	Faster Payment Debit	B/P to: Microshade	£338.41	£0.00	£184,821.36
20/10/2025	Faster Payment Debit	B/P to: Event Higher	£500.00	£0.00	£184,321.36
21/10/2025	Direct Debit	Direct Debit (GOCARDLESS)	£33.33	£0.00	£184,288.03
21/10/2025	Direct Debit	Direct Debit (EE LIMITED)	£15.12	£0.00	£184,272.91
29/10/2025	Direct Debit	Direct Debit (GRENKELEASING LIMI)	£32.39	£0.00	£184,240.52
29/10/2025	Transfer	B/P to: SLCC	£36.00	£0.00	£184,204.52
29/10/2025	Faster Payment Debit	B/P to: Jacks Appeal ABUHB	£3,105.00	£0.00	£181,099.52
31/10/2025	Fee	Service Charge	£8.25	£0.00	£181,091.27

Page number 3 of 4

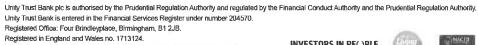




Pre-notification of account charges				
Туре	Count	Charge		
Automated Payments	9	£1.35		
Faster Payments	21	£3.15		
Manual		£0.00		
Account Fee	_	£6.00		

Additional information							
The combined account of	charge includes the	following transac	tion types:				
Automated Payments	Bacs Credit (in)	Direct Debit (out)	Faster Payment Credit (in)				
Faster Payments	Standing Orders (out)	Bill Payments (out)					
Manual	Cheques	Credits					
Account Fee	This is the standard charge for maintaining your account regardless of any transactions.						
Total charge	These charges do not include cash or cheques paid in through the Post Office, Bank Counter or via our Freepost service.						



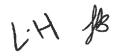


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# Your pre-notification statement



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Mr Stephen Edwards Abertillery And Llanhilleth Community Council Abertillery & Amp; Llanhilleth Community Council Mitre Street Abertillery United Kingdom **NP13 1AE** 

Date: 31/10/2025 Page number 1 of 3

Statement number: 029 Account Name: Abertillery And Llanhilleth Community Council

Sort Code: 608301

Account Number: 20490111

Dear Mr Stephen Edwards,

This letter outlines charges relating to the transactions and debit interest on your account between 01/10/2025 and 31/10/2025.

You can find full details of our fees and charges within the Standard Service Tariff on our website https://www.unity.co.uk/terms-and-conditions/

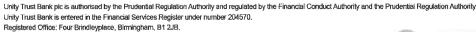
#### The charges for this billing period are:

Total charges	£10.50		
Total debit interest	£0.00		
To be debited from your account on	30/11/2025		

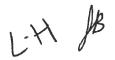




For Good.







#### **Interest and Charges**

Our General Terms & Conditions state when we may apply charges or interest.

Further information about debit interest and other fees or charges can be found in our Standard Service Tariff.

**Credit interest** – AER stands for Annual Equivalent Rate and describes what the interest rate would be if interest was paid and compounded annually.

**Debit interest** – ABR stands for Above Base Rate and describes the rate charged annually above the Bank of England Base Rate.

#### **Overdrafts**

Arranged overdrafts — We agree in advance to provide you with an overdraft that allows you to borrow money on your account up to an agreed overdraft limit. If approved by Unity you will be given an arranged overdraft limit along with an agreed interest rate. These are typically agreed for a period of 12 months and are linked to the Bank of England Base Rate.

**Unarranged overdrafts** – An overdrawn balance on your account which we have not agreed in advance. We will charge our unarranged overdraft rate on any unarranged balances.

If you have an arranged overdraft limit and exceed this limit, we will charge interest at the rate we have agreed with you on the balance of your arranged overdraft limit and will charge an unarranged overdraft rate on any balance over your arranged overdraft limit.

In either of these circumstances, debit interest will be applied on each working day that your account is overdrawn.

For details of our interest rates and charges, please visit https://www.unity.co.uk/terms-and-conditions/

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Date: 04/11/2025

#### **Abertillery & Llanhilleh Community Counc Current Year**

User: STEVE

Time: 10:28

Bank Reconciliation up to 31/10/2025 for Cashbook No 4 - Unity Trust Current

Page 1

<u>Date</u>	Cheque/Ref	Amnt Paid	Amnt Banked	Stat Amnt	Difference	Cleared	Payee Name or Description
01/10/2025	DD	35.68		35.68		R 🛒	Grenke Leasing Ltd
01/10/2025	Precept #2		217,011.50	217,011.50		R 🧧	Receipt(s) Banked
03/10/2025	BACS	130.00		130.00		R 📕	One Voice Wales
03/10/2025	BACS	386.40		386.40		R 🍯	City Illumninations
03/10/2025	BACS	12.00		12.00		R 📕	Brynithel Welfare Hall
03/10/2025	BACS	270.00		270.00		R 📕	Andrew Sheehy Green Fingers
03/10/2025	BACS	475.00		475.00		R 🌉	Andrew Sheehy Green Fingers
03/10/2025	BACS	14,685.34		14,685.34		R 🔳	, Blachere Illuminations
3/10/2025	BACS	926.40		926.40		R 📕	Misco Technologies
3/10/2025	DD	200.66		200.66		R 🌌	Grenke Leasing Ltd
13/10/2025	EMR/OWL		926.40	926.40		R 📕	Receipt(s) Banked
15/10/2025	BACS	6,883.02		6,883.02		R 📕	Awen (The Met)
15/10/2025	BACS	28,696.77		28,696.77		R 📕	Blaenau Gwent CBC
15/10/2025	BACS	150.00		150.00		R 📕	Blaenau Gwent CBC
15/10/2025	BACS	196.20		196.20		R 🛒	, Lawson D Jones
15/10/2025	BACS	100.00		100.00		R 📕	Mathew Williams (AJ Ents)
15/10/2025	BACS	28,696.77		28,696.77		R 📕	Blaenau Gwent CBC
15/10/2025	BACS	150.00		150.00		R 📕	Blaenau Gwent CBC
15/10/2025	BACS	111.77		111.77		R 📕	Marianne Green
15/10/2025	BACS	21.45		21.45		R 📕	Blaenau Gwent CBC
5/10/2025	BACS	96.46		96.46		R 📕	Blaenau Gwent CBC
15/10/2025	BACS	18.00		18.00		R 📕	Society Local Council Clerks
15/10/2025	BACS	78.00		78.00		R 📕	Society Local Council Clerks
15/10/2025	BACS	65.00		65.00		R 🛒	One Voice Wales
5/10/2025	DD	93.14		93.14		R 📕	Dwr Cymru Welsh Water
15/10/2025	DD	168.00		168.00		R 📕	Grenke Leasing
6/10/2025	DD	3.00		3.00		R 🗾	Lloyds Bank
21/10/2025	DD	33.33		33.33		R 📕	AR Digital
21/10/2025	BACS	500.00		500.00		R 🗹	Event Higher
21/10/2025	BACS	338.41		338.41		R 📕	Microshade Business Consultant
21/10/2025	BACS	95.00		95.00		R 📕	, Andrew Sheehy Green Fingers
21/10/2025	BACS	20.49		20.49		R 📕	Lyn Maloney
21/10/2025	DD	15.12		15.12		R 📕	EE
29/10/2025	BACS	36.00		36.00		R 🗾	Society Local Council Clerks
29/10/2025	BACS	2,763.00		2,763.00		R 🗹	Jacks Appeal ABUHB
29/10/2025	BACS	342.00		342.00		R 🗾	Jacks Appeal
29/10/2025	DD	32.39		32.39		R 🗾	Grenke
31/10/2025	CHARGES	8.25		8.25		R 🌌	Unity Trust Bank
		86,833.05	217,937.90				



Name FRANKIE BAKOR Signed B Date 14/11/25

Councillor 2:

Name LUCY HARMER Signed Lughanner Date 14/11/25.

Date: 04/11/2025

#### Abertillery & Llanhilleh Community Counc Current Year

Time: 10:28

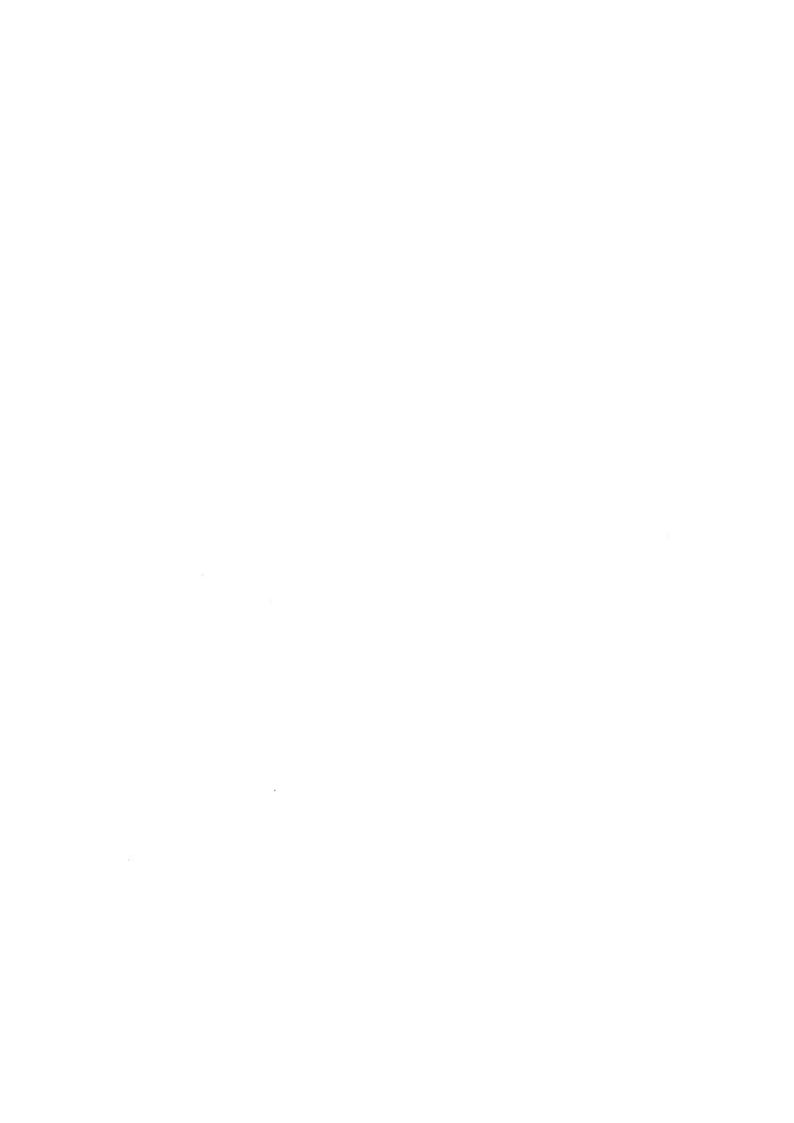
# Bank Reconciliation Statement as at 31/10/2025 for Cashbook 4 - Unity Trust Current

Page 1

User: STEVE

Bank Statement Account Name (s)	Statement Date	Page No	Balances
Unity Trust Current	31/10/2025	3	181,091.27
		-	181,091.27
Unpresented Payments (Minus)		Amount	
		0.00	
			0.00
			181,091.27
Unpresented Receipts (Plus)			
Chipresented Necepto (1 lde)			
onpresentat rescipto (i ide)		0.00	
onpresented Nessipto (1 las)		0.00	0.00
onpresentat Rescipto (Fide)		0.00	0.00
onpresented Rescripto (Fide)	Balance po	0.00 — er Cash Book is :-	

Name My have Signed Lux have Date 14/11/25





# Abertillery and Llanhilleth Community Council (ALCC)

# **Council Grant Application**

(see criteria and process attached before applying)

Name and Address of your group, organisation or project:

Abertillery	Aikido	Dojo,	Wyndam	Vowles	Community	Centre,	Crown	St,	Abertillery	NP13	1PJ

Contact name:

**Julian Morris** 

Telephone number:

Email:

# What are the aims of your project?

The aims of the Abertillery Aikido Dojo are to provide a welcoming and inclusive environment where people of all ages and abilities can learn and practice the art of Aikido. The project seeks to promote physical health, mental wellbeing, and personal development through structured training sessions that build confidence, discipline, and resilience. A key aim is to make martial arts accessible to the local community, offering opportunities for young people, adults, and families to engage in positive and affordable activities. The dojo also strives to foster respect, teamwork, and cultural awareness by teaching the traditions of Aikido, while strengthening community ties and reducing social isolation. In the long term, the project aims to create a sustainable club that nurtures both beginners and advanced practitioners, ensuring that Aikido continues to thrive in Abertillery as a valuable resource for the community.

# How does your project benefit the Abertillery and Llanhilleth area or its residents?

The Abertillery Aikido Dojo provides significant benefits to the residents of Abertillery and Llanhilleth by offering an inclusive and accessible space for physical activity, personal development, and social connection. The project encourages healthy lifestyles through regular exercise and training, improving physical fitness, coordination, and overall wellbeing. It also

supports mental health by promoting focus, stress reduction, confidence, and resilience.

The dojo fosters a sense of community by bringing together residents of all backgrounds, reducing social isolation and encouraging positive interactions. By preserving and sharing the cultural practice of Aikido, the project enriches local life and offers residents a unique learning experience. The club is currently facing financial challenges, particularly with covering venue hire costs, and support would help ensure it can continue to operate sustainably, providing lasting benefits for both individuals and the wider community.

## Details of project costs:

A. Project costs met by group (include match funds)	Amount (inc. VAT)
	£
	£
	£
Sub Total	£ 1,000
B. Costs requested from ALCC	Amount (inc.VAT)
Rent	£ 1,000
	£
Sub Total	£
C. Total project costs (A + B) TOTAL	£ 2000

ls your organisation a:	Charity/community group/sports club/company/not for profit business/other (explain and provide evidence)
	Sports Club
Payee:	ABERICLERY AINIDO
Print Name:	Julian Morris
Role in group:	Secretary – Abertillery Aikido
Signed:	1.6.20:
Date:	24 <sup>th</sup> September 2025

Please return this form with any relevant supporting documents (group constitution, financial statements, letters of support etc.) to <a href="mailto:clerk@abertilleryandllanhilleth-wcc.gov.uk">clerk@abertilleryandllanhilleth-wcc.gov.uk</a> or:

Town Clerk,
Abertillery and Llanhilleth Community Council,
Mitre Street,
Abertillery,
NP13 1AE

# Smart Money Cymru Credit Union Ltd

Phone: 029 2088 3751

Fax: 029 2088 3785

Email : Info@smartmoneycymru.co.uk

# Private & Confidential

Abertillery Aikido

Banna Cottage

Nantyglo

Blaenau Gwent

NP23 4NP

# Member Statement

Period 01/02/2025 to 06/05/2025

Member Number

100871

Date of Issue

06/05/2025

Page Number

Page 1 of 1

Account Name Share 1

Opening Balance £0.00

Date	Source	Payee	Debit	Credit	Interest		
27/02/2025	GAVO 26.02.25		Amount	Amount	Amount	Transaction Total	Balance
26/03/2025 23/04/2025	Abertillery Aikido March Hall Abertillery Aikido April	C R Arnold	80.00	1,000.00		1,000.00	1,000.0 920.0
	Hall		80.00			80.00	840.00

Closing Balance £840.00

Payment to be made to Smart Money Cymru Credit Union Limited. Sort Code: 08-90-03 Account Number: 50617838. Please use your membership number as reference.



# Abertillery And Llanhilleth Community Council Financial Regulations

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These Financial Regulations have been modified from the NALC 2024 Model Financial Regulations.

These Financial Regulations were adopted by the council at its meeting held on 30/10/2024.

#### 1. General

- 1.1. These Financial Regulations govern the financial management of the council and may only be amended or varied by resolution of the council. They are one of the council's governing documents and shall be observed in conjunction with the council's Standing Orders.
- 1.2. Councillors are expected to follow these regulations and not to entice employees to breach them. Failure to follow these regulations brings the office of councillor into disrepute.
- 1.3. Wilful breach of these regulations by an employee may result in disciplinary proceedings.
- 1.4. In these Financial Regulations:
  - 'Accounts and Audit Regulations' means the regulations issued under Sections 32, 43(2) and 46 of the Local Audit and Accountability Act 2014, or any superseding legislation, and then in force, unless otherwise specified.
  - "Approve" refers to an online action, allowing an electronic transaction to take place.
  - "Authorise" refers to a decision by the council, or a committee or an officer, to allow something to happen.
  - 'Proper practices' means those set out in *The Practitioners' Guide*
  - Practitioners' Guide refers to the guide issued by the Joint Panel on
  - Accountability and Governance (JPAG) and published by NALC in England or Governance and Accountability for Local Councils in Wales – A Practitioners Guide jointly published by One Voice Wales and the Society of Local Council Clerks in Wales.
  - 'Must' and bold text refer to a statutory obligation the council cannot change.
  - 'Shall' refers to a non-statutory instruction by the council to its members and staff.
- 1.5. The Responsible Financial Officer (RFO) holds a statutory office, appointed by the council. The Clerk has been appointed as RFO and these regulations apply accordingly. The RFO;
  - acts under the policy direction of the council;
  - administers the council's financial affairs in accordance with all Acts, Regulations and proper practices;
  - determines on behalf of the council its accounting records and control systems;
  - ensures the accounting control systems are observed;
  - ensures the accounting records are kept up to date;
  - seeks economy, efficiency and effectiveness in the use of council resources; and
  - produces financial management information as required by the council.
- 1.6. The council must not delegate any decision regarding:
  - setting the final budget or the precept (council tax requirement);
  - the outcome of a review of the effectiveness of its internal controls
  - approving accounting statements;
  - approving an annual governance statement;
  - borrowing;
  - declaring eligibility for the General Power of Competence; and
  - addressing recommendations from the internal or external auditors
- 1.7. In addition, the council/relevant committee shall:
  - determine and regularly review the bank mandate for all council bank accounts;
  - authorise any grant or single commitment in excess of £5,000 any new line of spending over £5,000 must go back to council or the relevant committee; and

#### 2. Risk management and internal control

- 2.1. The council must ensure that it has a sound system of internal control, which delivers effective financial, operational and risk management.
- 2.2. The Clerk shall prepare, for approval by the council following recommendations from the Finance and Governance Committee, a risk management policy covering all activities of the

- council. This policy and consequential risk management arrangements shall be reviewed by the council at least annually.
- 2.3. When considering any new activity, the Clerk shall prepare a draft risk assessment including risk management proposals for consideration by the council.
- 2.4. At least once a year, the council must review the effectiveness of its system of internal control, before approving the Annual Governance Statement.
- 2.5. The accounting control systems determined by the RFO must include measures to:
  - ensure that risk is appropriately managed;
  - ensure the prompt, accurate recording of financial transactions;
  - prevent and detect inaccuracy or fraud; and
  - allow the reconstitution of any lost records;
  - identify the duties of officers dealing with transactions and
  - ensure division of responsibilities.
- 2.6. At least once in each month, and at each financial year end, two members of the Finance and Governance Committee shall be appointed to verify bank reconciliations for all accounts produced by the RFO. The member shall sign and date the reconciliations as evidence of this. This activity, including any exceptions, shall be reported to and noted by the council and Finance and Governance Committee.
- 2.7. Regular back-up copies shall be made of the records on any council computer and stored either online or in a separate location from the computer. The council shall put measures in place to ensure that the ability to access any council computer is not lost if an employee leaves or is incapacitated for any reason.

#### 3. Accounts and audit

- 3.1. All accounting procedures and financial records of the council shall be determined by the RFO in accordance with the Accounts and Audit Regulations.
- 3.2. The accounting records determined by the RFO must be sufficient to explain the council's transactions and to disclose its financial position with reasonably accuracy at any time. In particular, they must contain:
  - day-to-day entries of all sums of money received and expended by the
  - council and the matters to which they relate;
  - a record of the assets and liabilities of the council;
- 3.3. The accounting records shall be designed to facilitate the efficient preparation of the accounting statements in the Annual Return.
- 3.4. The RFO shall complete and certify the annual Accounting Statements of the council contained in the Annual Return in accordance with proper practices, as soon as practicable after the end of the financial year. Having certified the Accounting Statements, the RFO shall submit them (with any related documents) to the council, within the timescales required by the Accounts and Audit Regulations.
- 3.5. The council must ensure that there is an adequate and effective system of internal audit of its accounting records and internal control system in accordance with proper practices.
- 3.6. Any officer or member of the council must make available such documents and records as the internal or external auditor consider necessary for the purpose of the audit and shall, as directed by the council, supply the RFO, internal auditor, or external auditor with such information and explanation as the council considers necessary.
- 3.7. The internal auditor shall be appointed by the council and shall carry out their work to evaluate the effectiveness of the council's risk management, control and governance processes in accordance with proper practices specified in the Practitioners' Guide.
- 3.8. The council shall ensure that the internal auditor:
  - is competent and independent of the financial operations of the council;

- reports to council in writing, or in person, on a regular basis with a minimum of one written report during each financial year;
- can demonstrate competence, objectivity and independence, free from any actual or perceived conflicts of interest, including those arising from family relationships; and
- has no involvement in the management or control of the council
- 3.9. Internal or external auditors may not under any circumstances:
  - perform any operational duties for the council;
  - initiate or approve accounting transactions;
  - provide financial, legal or other advice including in relation to any future transactions;
     or
  - direct the activities of any council employee, except to the extent that such employees have been appropriately assigned to assist the internal auditor.
- 3.10. For the avoidance of doubt, in relation to internal audit the terms 'independent' and 'independence' shall have the same meaning as described in The Practitioners Guide.
- 3.11. The RFO shall make arrangements for the exercise of electors' rights in relation to the accounts, including the opportunity to inspect the accounts, books, and vouchers and display or publish any notices and documents required by the Local Audit and Accountability Act 2014, or any superseding legislation, and the Accounts and Audit Regulations.
- 3.12. The RFO shall, without undue delay, bring to the attention of all councillors any correspondence or report from internal or external auditors.

#### 4. Budget and precept

- 4.1. Before setting a precept, the council must calculate its budget (Wales) requirement for each financial year by preparing and approving a budget, in accordance with The Local Government Finance Act 1992 or succeeding legislation.
- 4.2. Budgets for salaries and wages, including employer contributions shall be reviewed by the HR Committee at least annually in November for the following financial year and the final version shall be evidenced by a hard copy schedule signed by the Clerk and the Chair of the Council.
- 4.3. No later than November each year, the RFO shall prepare a draft budget with detailed estimates of all receipts and payments/income and expenditure for the following financial year taking account of the lifespan of assets and cost implications of repair or replacement.
- 4.4. Unspent budgets for completed projects shall not be carried forward to a subsequent year.

  Unspent funds for partially completed projects may only be carried forward (by placing them in an earmarked reserve) with the formal approval of the full council.
- 4.5. Each committee shall review its draft budget and submit any proposed amendments to the Finance and Governance committee

committee not later than the end of November each year.

- 4.6. The draft budget with any committee proposals and, including any recommendations for the use or accumulation of reserves, shall be considered by the Finance and Governance Committee and a recommendation made to the council.
- 4.7. Having considered the proposed budget, the council shall determine its budget (Wales) requirement via the Council's budget process. The council shall set a precept for this amount no later than the end of January for the ensuing financial year.
- 4.8. Any member with council tax unpaid for more than two months is prohibited from voting on the budget or precept by Section 106 of the Local Government Finance Act 1992 and must and must disclose at the start of the meeting that Section 106 applies to them.
- 4.9. The RFO shall issue the precept to the billing authority no later than the end of February and supply each member with a copy of the agreed annual budget.
- 4.10. The agreed budget provides a basis for monitoring progress during the year by comparing actual spending and income against what was planned.

4.11. Any addition to, or withdrawal from, any earmarked reserve shall be agreed by the council or RFO if required to cover essential spending.

#### 5. Procurement

- 5.1. **Members and officers are responsible for obtaining value for money at all times.** Any officer procuring goods, services or works should ensure, as far as practicable, that the best available terms are obtained, usually by obtaining prices from several suppliers.
- 5.2. The RFO should verify the lawful nature of any proposed purchase before it is made and in the case of new or infrequent purchases, should ensure that the legal power being used is reported to the meeting at which the order is authorised and also recorded in the minutes.
- 5.3. Every contract shall comply with these the council's Standing Orders and these Financial Regulations and no exceptions shall be made, except in an emergency.
- 5.4. For a contract for the supply of goods, services or works where the estimated value will exceed the thresholds set by Parliament, the full requirements of The Public Contracts Regulations 2015 or any superseding legislation ("the Legislation"), must be followed in respect of the tendering, award and notification of that contract.
- 5.5. Where the estimated value is below the Government threshold, the council shall (with the exception of items listed in paragraph 6.12) obtain prices as follows:
- 5.6. For all contracts, the Clerk shall seek formal tenders from at least three suppliers by advertising an open invitation for tenders in compliance with any relevant provisions of the Legislation. Tenders shall be invited in accordance with Appendix 1.
- 5.7. For contracts estimated to be over £30,000 including VAT, the council must comply with any requirements of the Legislation<sup>1</sup> regarding the advertising of contract opportunities and the publication of notices about the award of contracts.
- 5.10. For smaller purchases (under £1,000), the officers shall seek to achieve value for money.
- 5.11. Contracts must not be split into smaller lots to avoid compliance with these rules.
- 5.12. The requirement to obtain competitive prices in these regulations need not apply to contracts that relate to items (i) to (iv) below:
  - i. specialist services, such as legal professionals acting in disputes;
  - ii. repairs to, or parts for, existing machinery or equipment;
  - iii. works, goods or services that constitute an extension of an existing contract;
  - iv. goods or services that are only available from one supplier or are sold at a fixed price.
- 5.13. When applications are made to waive this financial regulation to enable a price to be negotiated without competition, the reason should be set out in a recommendation to the council {or relevant committee}. Avoidance of competition is not a valid reason.
- 5.14. The council shall not be obliged to accept the lowest or any tender, quote or estimate.
- 5.15. Individual purchases within an agreed budget for that type of expenditure may be authorised by:
  - the Clerk, under delegated authority, for any items below £1,000 excluding VAT.
  - the Clerk, in consultation with the Chair of the Council or Chair of the appropriate committee, for any items below £2,000 excluding VAT.
  - {a duly delegated committee of the council for all items of expenditure within their delegated budgets for items under £5,000 excluding VAT.
  - in respect of grants, a duly authorised committee within any limits set by council and in accordance with any policy statement agreed by the council.
  - the council for all items over £5,000;

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<sup>&</sup>lt;sup>1</sup> The Regulations require councils to use the Contracts Finder website if they advertise contract opportunities and also to publicise the award of contracts over £30,000 including VAT, regardless of whether they were advertised.

- Such authorisation must be supported by a minute (in the case of council or committee decisions) or other auditable evidence trail.
- 5.16. No individual member, or informal group of members may issue an official order unless instructed to do so in advance by a resolution of the council or make any contract on behalf of the council.
- 5.17. No expenditure may be authorised that will exceed the budget for that type of expenditure other than by resolution of the council.
- 5.18. In cases of serious risk to the delivery of council services or to public safety on council premises, the clerk may authorise expenditure of up to £1,000 excluding VAT on repair, replacement or other work that in their judgement is necessary, whether or not there is any budget for such expenditure. The Clerk shall report such action to the Chair as soon as possible and to the council as soon as practicable thereafter.
- 5.19. No expenditure shall be authorised, no contract entered into or tender accepted in relation to any new project, unless the council is satisfied that the necessary funds are available and that where a loan is required, Government borrowing approval has been obtained first.
- 5.20. An official order, email or letter shall be issued for all work, goods and services above £250 excluding VAT unless a formal contract is to be prepared or an official order would be inappropriate. Copies of orders shall be retained, along with evidence of receipt of goods.
- 5.21. Any ordering system can be misused and access to them shall be controlled by the RFO.

#### 6. Banking and payments

- 6.1. The council's banking arrangements, including the bank mandate, shall be made by the RFO and authorised by the council; banking arrangements shall not be delegated to a committee. The council has resolved to bank with Unity Trust Bank and CCLA. The arrangements shall be reviewed annually for security and efficiency.
- 6.2. The council must have safe and efficient arrangements for making payments, to safeguard against the possibility of fraud or error. These arrangements are to be reviewed annually by the Finance and Governance Committee and any recommendations to be forwarded to the council. Wherever possible, more than one person should be involved in any payment, for example by dual online authorisation or dual cheque signing. Even where a purchase has been authorised, the payment must also be authorised and only authorised payments shall be approved or signed to allow the funds to leave the council's bank.
- 6.3. All invoices for payment should be examined for arithmetical accuracy, analysed to the appropriate expenditure heading and verified to confirm that the work, goods or services were received, checked and represent expenditure previously authorised by the council before being certified by the RFO. Where the certification of invoices is done as a batch, this shall include a statement by the RFO that all invoices listed have been 'examined, verified and certified' by the RFO.
- 6.4. Personal payments (including salaries, wages, expenses and any payment made in relation to the termination of employment) may be summarised to avoid disclosing any personal information.
- 6.5. All payments shall be made by online banking/cheque, in accordance with a resolution of the council or duly delegated committee or a delegated decision by an officer, unless the council resolves to use a different payment method.
- 6.6. For each financial year the RFO shall draw up a schedule of regular payments due in relation to a continuing contract or obligation (such as Salaries, PAYE, National Insurance, pension contributions, rent, rates, regular maintenance contracts and similar items), which the council or a duly delegated committee may authorise in advance for the year.
- 6.9. The Clerk and RFO shall have delegated authority to authorise payments only in the following circumstances:
  - i. any payments of up to £1,000, within an agreed budget.

ii. payments of up to £1,000 in cases of serious risk to the delivery of council services or to public safety on council premises.

iii. any payment necessary to avoid a charge under the Late Payment of Commercial Debts (Interest) Act 1998 or to comply with contractual terms, where the due date for payment is before the next scheduled meeting of the council, where the Clerk certifies that there is no dispute or other reason to delay payment, provided that a list of such payments shall be submitted to the next appropriate meeting of council or Finance and Governance Committee.

iv. Fund transfers within the councils banking arrangements up to the sum of £10,000, provided that a list of such payments shall be submitted to the next appropriate meeting of council or Finance and Governance Committee.

v. In the event that it is not possible to convene a meeting and legislation does not allow for virtual meetings, the Clerk will have delegated authority to make decisions on behalf of the council where such a decision cannot be reasonably deferred or must be made in order to comply with commercial or statutory deadlines. This will be carried out where possible in consultation with the Chair and Vice Chair. Any decision made under this delegation must be recorded in writing by the Clerk and reported at the next convened meeting of the council. The delegation authority ceases upon the first meeting of the council after the emergency delegation has been enacted.

#### 7. Electronic payments

- 7.1. Where internet banking arrangements are made with any bank, the RFO shall be appointed as the Service Administrator. The bank mandate agreed by the council shall identify four councillors who will be authorised to approve transactions on those accounts and a minimum of two people will be involved in any online approval process. No signatory should be involved in approving any payment to themselves or any organisation they have an interest in unless payments cannot be made because there are not enough remaining signatories.
- 7.2. All authorised signatories shall have access to view the council's bank accounts online.
- 7.3. No employee or councillor shall disclose any PIN or password, relevant to the council or its banking, to anyone.
- 7.4. The Service Administrator shall set up all items due for payment online. A list of payments for approval, together with copies of the relevant invoices, shall be sent by email to all authorised signatories.
- 7.5. In the prolonged absence of the Service Administrator an authorised signatory shall set up any payments due before the return of the Service Administrator.
- 7.6. Two councillors who are authorised signatories shall check the payment details against the invoices before approving each payment using the online banking system.
- 7.7. Evidence shall be retained showing which members approved the payment online
- 7.8. A full list of all payments made in a month shall be provided to the next council meeting.
- 7.9. With the approval of the council in each case, regular payments (such as gas, electricity, telephone, broadband, water, National Non-Domestic Rates, refuse collection, pension contributions, printing costs, mobile phone and HMRC payments) may be made by variable direct debit, provided that the instructions are signed/approved online by two authorised members. The approval of the use of each variable direct debit shall be reviewed by the Finance and Governance Committee at least every two years.
- 7.10. Payment may be made by BACS or CHAPS by resolution of the council provided that each payment is approved online by two authorised bank signatories, evidence is retained and any payments are reported to the council at the next meeting. The approval of the use of BACS or CHAPS shall be renewed by resolution of the council at least every two years.
- 7.11. If thought appropriate by the council, regular payments of fixed sums may be made by banker's standing order, provided that the instructions are signed or approved online by two

- members, evidence of this is retained and any payments are reported to council when made. The approval of the use of a banker's standing order shall be reviewed by the council at least every two years.
- 7.12. Account details for suppliers may only be changed upon written notification by the supplier verified by three people one officer and two of the authorised signatories. This is a potential area for fraud and the individuals involved should ensure that any change is genuine. Details held should be checked with suppliers every two years.
- 7.13. Members and officers shall ensure that any computer used for the council's financial business has adequate security, with anti-virus, anti-spyware and firewall software installed and regularly updated. A note of compliance shall be signed off by the Clerk.
- 7.14. Remembered password facilities other than secure password stores requiring separate identity verification should not be used on any computer used for council banking.

#### 8. Cheque payments

- 8.1. Cheques or orders for payment in accordance with a resolution or delegated decision shall be signed by two authorised signatories and countersigned by the Clerk.
- 8.2. A signatory having a family or business relationship with the beneficiary of a payment shall not, under normal circumstances, be a signatory to that payment.
- 8.3. To indicate agreement of the details on the cheque with the counterfoil and the invoice or similar documentation, the signatories shall also initial the cheque counterfoil and invoice.

#### 9. Payment cards

- 9.1. Any Debit Card issued for use will be specifically restricted to the Clerk and will also be restricted to a single transaction maximum value of £1,000 unless authorised by council or Finance and Governance Committee in writing before any order is placed.
- 9.2. A pre-paid debit card may be issued to employees with varying limits. These limits will be set by the council. Transactions and purchases made will be reported to the council and authority for topping-up shall be at the discretion of the council.
- 9.4. Personal credit or debit cards of members or staff shall not be used under any circumstances.

#### 10. Petty Cash

10.1. The council will not maintain any form of cash float. All cash received must be banked intact. Any payments made in cash by the Clerk (for example for postage or minor stationery items) shall be refunded on a regular basis, at least quarterly.

## 11. Payment of salaries and allowances

- 11.1. As an employer, the council must make arrangements to comply with the statutory requirements of PAYE legislation.
- 11.2. Councillors allowances (where paid) are also liable to deduction of tax under PAYE rules and must be taxed correctly before payment.
- 11.3. Salary rates shall be agreed by the council, or a duly delegated committee. No changes shall be made to any employee's gross pay, emoluments, or terms and conditions of employment without the prior consent of the council or relevant committee.
- 11.4. Payment of salaries shall be made, after deduction of tax, national insurance, pension contributions and any similar statutory or discretionary deductions, on the dates stipulated in employment contracts.
- 11.5. Deductions from salary shall be paid to the relevant bodies within the required timescales, provided that each payment is reported, as set out in these regulations above.
- 11.6. Each payment to employees of net salary and to the appropriate creditor of the statutory and discretionary deductions shall be recorded in a payroll control account or other separate confidential record, with the total of such payments each calendar month reported in the

- cashbook. Payroll reports are received quarterly from the principal authority. The HR committee will review these reports quarterly and send a note to the Finance and Governance Committee confirming that they have been checked and that the correct payments have been made.
- 11.7. Any termination payments shall be supported by a report to the council, setting out a clear business case. Termination payments shall only be authorised by the full council.
- 11.8. Before employing interim staff, the council must consider a full business case.

#### 12. Loans and investments

- 12.1. Any application for Government approval to borrow money and subsequent arrangements for a loan must be authorised by the full council and recorded in the minutes. All borrowing shall be in the name of the council, after obtaining any necessary approval.
- 12.2. Any financial arrangement which does not require formal borrowing approval from the Welsh Assembly Government (such as Hire Purchase, Leasing of tangible assets or loans to be repaid within the financial year) must be authorised by the full council, following a written report on the value for money of the proposed transaction.
- 12.3. The council shall consider the requirement for an Investment Strategy and Policy in accordance with Statutory Guidance on Local Government Investments, which must written be in accordance with relevant regulations, proper practices and guidance. Any Strategy and Policy shall be reviewed by the council at least annually.
- 12.4. All investment of money under the control of the council shall be in the name of the council.
- 12.5. All investment certificates and other documents relating thereto shall be retained in the custody of the RFO.
- 12.6. Payments in respect of short term or long-term investments, including transfers between bank accounts held in the same bank, shall be made in accordance with these regulations.

#### 13. Income

- 13.1. The collection of all sums due to the council shall be the responsibility of and under the supervision of the RFO.
- 13.2. The council will review all fees and charges for work done, services provided, or goods sold at least annually as part of the budget-setting process, following a report of the Clerk. The RFO shall be responsible for the collection of all amounts due to the council.
- 13.3. Any sums found to be irrecoverable and any bad debts shall be reported to the council by the RFO and shall be written off in the year. The council's approval shall be shown in the accounting records.
- 13.4. All sums received on behalf of the council shall be deposited intact with the council's bankers, with such frequency as the RFO considers necessary. The origin of each receipt shall clearly be recorded on the paying-in slip or other record.
- 13.5. Personal cheques shall not be cashed out of money held on behalf of the council.
- 13.6. The RFO shall ensure that VAT is correctly recorded in the council's accounting software and that any VAT Return required is submitted from the software by the due date..
- 13.7. Where sums of cash are regularly received by the council, the RFO shall ensure that more than one person is present when the cash is counted in the first instance, that there is a reconciliation to some form of control record such as ticket issues, and that appropriate care is taken for the security and safety of individuals banking such cash.
- 13.8. Any income that is the property of a charitable trust shall be paid into a charitable bank account. Instructions for the payment of funds due from the charitable trust to the council (to meet expenditure already incurred by the authority) will be given by the Managing Trustees of the charity meeting separately from any council meeting.

# 14. Payments under contracts for building or other construction works

- 14.1. Where contracts provide for payment by instalments the RFO shall maintain a record of all such payments, which shall be made within the time specified in the contract based on signed certificates from the architect or other consultant engaged to supervise the works.
- 14.2. Any variation of, addition to or omission from a contract must be authorised by the Clerk to the contractor in writing, with the council being informed where the final cost is likely to exceed the contract sum by 5% or more, or likely to exceed the budget available.

#### 15. Stores and equipment

- 15.1. The officer in charge of each section shall be responsible for the care and custody of stores and equipment in that section.
- 15.2. Delivery notes shall be obtained in respect of all goods received into store or otherwise delivered and goods must be checked as to order and quality at the time delivery is made.
- 15.3. Stocks shall be kept at the minimum levels consistent with operational requirements.
- 15.4. The RFO shall be responsible for periodic checks of stocks and stores, at least annually.

#### 16. Assets, properties and estates

- 16.1. The Clerk shall make arrangements for the safe custody of all title deeds and Land Registry Certificates of properties held by the council.
- 16.2. The RFO shall ensure that an appropriate and accurate Register of Assets and Investments is kept up to date, with a record of all properties held by the council, their location, extent, plan, reference, purchase details, nature of the interest, tenancies granted, rents payable and purpose for which held, in accordance with Accounts and Audit Regulations.
- 16.3. The continued existence of tangible assets shown in the Register shall be verified at least annually, possibly in conjunction with a health and safety inspection of assets.
- 16.4. No interest in land shall be purchased or otherwise acquired, sold, leased or otherwise disposed of without the authority of the council, together with any other consents required by law. In each case a written report shall be provided to council in respect of valuation and surveyed condition of the property (including matters such as planning permissions and covenants) together with a proper business case (including an adequate level of consultation with the electorate where required by law).
  - No tangible moveable property shall be purchased or otherwise acquired, sold, leased or otherwise disposed of, without the authority of the council, together with any other consents required by law, except where the estimated value of any one item does not exceed [£500]. In each case a written report shall be provided to council with a full business case
- 16.5 Any write off of any asset shall in the first instance be confirmed by the RFO and then reviewed and agreed by the Finance and Governance Committee before removal from the asset register. The write off will be listed in the minutes of that committee meeting.

#### 17. Insurance

- 17.1. The RFO shall keep a record of all insurances effected by the council and the property and risks covered, reviewing these annually before the renewal date in conjunction with the council's review of risk management.
- 17.2. The Clerk shall give prompt notification of all new risks, properties or vehicles which require to be insured and of any alterations affecting existing insurances.
- 17.3. The RFO shall be notified of any loss, liability, damage or event likely to lead to a claim, and shall report these to the council at the next available meeting. The RFO shall negotiate all claims on the council's insurers.

17.4. All appropriate members and employees of the council shall be included in a suitable form of security or fidelity guarantee insurance which shall cover the maximum risk exposure as determined annually by the council, or duly delegated committee.

#### 18. Charities

18.1. Where the council is sole managing trustee of a charitable body the Clerk shall ensure that separate accounts are kept of the funds held on charitable trusts and separate financial reports made in such form as shall be appropriate, in accordance with Charity Law and legislation, or as determined by the Charity Commission. The Clerk and RFO shall arrange for any audit or independent examination as may be required by Charity Law or any Governing Document.

#### 19. Suspension and revision of Financial Regulations

- **19.1.** The council shall review these Financial Regulations annually and following any change of clerk. The Clerk shall monitor changes in legislation or proper practices and advise the council of any need to amend these Financial Regulations.
- 19.2. The council may, by resolution duly notified prior to the relevant meeting of council, suspend any part of these Financial Regulations, provided that reasons for the suspension are recorded and that an assessment of the risks arising has been presented to all members. Suspension does not disapply any legislation or permit the council to act unlawfully.
- 19.3. The council may temporarily amend these Financial Regulations by a duly notified resolution, to cope with periods of absence, local government reorganisation, national restrictions or other exceptional circumstances.
- 19.4 Only a meeting of the council can permanently amend the Financial Regulations, this authority cannot be delegated to a committee or officers.

### **Appendix 1 - Tender process**

- 1. Any invitation to tender shall state the general nature of the intended contract and the Clerk shall obtain the necessary technical assistance to prepare a specification in appropriate cases.
- 2. The invitation shall in addition state that tenders must be addressed to the Clerk in the ordinary course of post, unless an electronic tendering process has been agreed by the council.
- 3. Where a postal process is used, each tendering firm shall be supplied with a specifically marked envelope in which the tender is to be sealed and remain sealed until the prescribed date for opening tenders for that contract. All sealed tenders
- 4. shall be opened at the same time on the prescribed date by the Clerk in the presence of at least one member of council.
- 5. Where an electronic tendering process is used, the council shall use a specific email address that will be monitored to ensure that nobody accesses any tender before the expiry of the deadline for submission.
- 6. Any invitation to tender issued under this regulation shall be subject to Standing
- 7. Order [insert reference of the council's relevant standing order] and shall refer to the terms of the Bribery Act 2010.
- 8. Where the council, or duly delegated committee, does not accept any tender, quote or estimate, the work is not allocated and the council requires further pricing, no person shall be permitted to submit a later tender, estimate or quote who was present when the original decision-making process was undertaken.

# **Abertillery and Llanhilleth Community Council Training Policy**

#### **Training Policy**

- 1. All Members and officers of the Council shall be offered the opportunity to undertake any and all of the following training modules within twelve months of the beginning of the Council term to ensure they have sufficient skills and understanding (or, in the case of co-opted Members, within twelve months of taking office).
  - New Councillor Induction
  - Module 1 The Council
  - Module 2 The Councillor
  - Module 3 The Council as an Employer
  - Module 4 Understanding the Law
  - Module 5 The Council Meeting
  - Module 6 Local Government Finance
  - Module 7 Health and Safety
  - Module 8 Introduction to Community Engagement
  - Module 9 Code of Conduct
  - Module 10 Chairing Skills

Additional modules are also available and can be attended once all the above have been completed. The full list of training modules and a brief description of each can be found in **Appendix A**.

On 30 April 2025, Council RESOLVED to agree that Code of Conduct training is completed every 5 years (minute number 9).

2. All Members of the Finance and Governance Committee will be offered the opportunity to undertake the *Local Government Finance* module within six months of their appointment to the Committee. If a Member of the Finance Committee has not completed the *Local Government* 

Finance module within six months of their appointment to the Committee, a motion to de-select that Member from the Committee shall be tabled at the next Full Council meeting.

- 3. All Members of the HR Committee will be offered the opportunity to undertake the *Council as an Employer* module within six months of their appointment to the Committee. If a Member of the HR Committee has not completed the *Council as an Employer* within six months of their appointment to the Committee, a motion to de-select that Member from the Committee shall be tabled at the next Full Council meeting.
- 4. The Chair of Council, Vice-Chair of Council and all Chairs of Committee will be offered the opportunity to undertake the *Chairing Skills* module within six months of their election/appointment. If a Chair of a Committee has not completed the *Chairing Skills* module within six months of their appointment as Chair of the Committee, a motion to de-select the Chair of the Committee shall be tabled at the next meeting of that committee. The individual can remain on the committee.
- 5. A Member may claim special dispensation if they had completed a training module during the twelve months immediately preceding the beginning of the Council term (or, in the case of co-opted Members, during the twelve months immediately preceding their taking office). The Full Council (or Committee, as appropriate) shall decide whether special dispensation shall be allowed for this or for any other reason.
- 6. A Member who is deselected from a Committee or from the role of Chair of a Committee for the reasons above shall not be reappointed to that position for at least six months.
- 7. A Member shall be deemed to have been deselected from a Committee or from the role of Chair of a Committee if they resign from that position having failed to complete the necessary training module within the specified time period.
- 8. This policy refers to the titles of committees and to the title of training modules delivered by, or through, One Voice Wales as of November 2025. This policy shall remain in force if the title of a committee changes but its duties and responsibilities remain broadly similar. This policy shall also remain in force if the title of a training module changes, and/or it is delivered by a different training provider, but its content remains broadly similar.
- 9. Training Needs It is essential that councillors identify what training they require (for example, Local Government Finance if they are on a finance committee) and receive adequate training to understand the role to which they have been elected, enabling them to understake their

role and ensuring that they are aware of their responsibilities when undertaking their role as a councillor. Training enables councillors to carry out their duties to the best of their ability and be kept up to date with all current legislation. The costs associated with the Councillor Training Programme will be met from the existing ALCC budget provision. One Voice Wales will invoice ALCC directly and anyone attending the training course will get their certificate emailed to them after completion.

Staff training will be identified by the Clerk through the recruitment and annual appraisal processes.

When One Voice Wales releases a list of available training courses and dates, officers will email it to councillors. It is the responsibility of each individual councillor to request a date to attend. Once a place has been confirmed, an email with the details will be sent out. Another email with a link to join the meeting will be sent 24 hours before the course starts.

If you aren't able to attend because of unforeseen circumstances, you must contact the Clerk as soon as possible. It may be possible to rearrange. Failure to attend without prior notification (except in exceptional circumstances, such as sickness or a domestic emergency) will result in the councillor being charged for the course. Currently, this is £65.00 (for non-members of One Voice Wales).

10. Training courses from providers other than One Voice Wales may also be available and will be shared with councillors and staff.

# **Training Plan**

It is the objective of Abertillery and Llanhilleth Community Council to consider how training and development needs are identified and reflected in the training plan. All councillors will be offered new councillor induction training plus modules 1-10 as shown in the training policy. Priority will be given to the training requirements identified in points 2,3 and 4 of this policy. Additional training may be provided if a need/gap is identified for development. For example, if Council decides to organise a community event for the first time, a clear need may be for a councillor or staff member to attend health and safety or community engagement training. There is a limited budget for training and this needs to be balanced with the overall needs to support councillors and staff.

Please see Appendix B for the Councillor Training Plan and Appendix C for the Staff Training Plan.

#### Appendix A

# One Voice Wales - National Training Programme for Community and Town Councils in Wales

# New Councillor Induction - Only available at Election time and Bespoke sessions

This session covers the following topics:

- What town and community councils do
- How they serve their communities
- The changing world of councils
- What makes a good council
- Your role as a councillor
- Your commitment and the Code of Conduct
- Fulfilling your duties and responsibilities
- Being the voice of the community

#### Module 1 - The Council

- The Council as a Corporate Body
- The "Team" of Members and Staff
- The Council's Role Working with Unitary Authorities
- Building Partnership Working

During the presentation we will cover the council as a corporate body, the 'team' of members and staff, the council's role, working with unitary authorities, and building partnership working with a wider group of organisations. By the end of this presentation, you should have a good understanding of the range of responsibilities of community and town councils as well as their changing role in serving local communities in Wales today.

#### **Module 2 - The Councillor**

• The Councillor and their Commitment

- Register of Interests
- Code of Conduct and Ethical Behaviour
- Monitoring Officers and Standards Committees
- Debating and Making Decisions
- Representing Your Electorate
- Building Bridges

During the presentation we will cover the councillor and their commitment to the office of councillor, the Register of Members Interests, the Code of Conduct and ethical behaviour expected of a councillor, the role of the Monitoring Officer and the Standards Committee, the rules of debating and making decisions, how you represent on your electorate, and the need to "build bridges" between yourself, the council and other interested parties.

#### Module 3 - The Council as an Employer

- Contracts of Employment
- Role and Person Specification
- Recruitment and Retention
- Discipline, Grievance and Appeals
- Health and Safety
- Training and Development
- Sources of Advice

During the presentation we will explore the role of the council as an employer. We will cover contracts of employment and how these define the employment relationship, the role and person specification, you may know the role specification as the 'job description', recruitment and retention, what you should do if things are going wrong, health and safety, and perhaps the most important of all getting the best out of everyone to help serve your local community, through training and development. Employment law and best practice is a complicated area, so lastly, we will finish by looking at some sources of advice.

# Module 4 – Understanding The Law

- Statutory duties and powers
- Ultra Vires
- The Powers of Delegation
- Welsh Language Act
- The duty to promote Equal Opportunities
- Data Protection and FOI Act

#### Sources of advice

During the presentation we will cover a range of legislation and legal duties that affect community and town councils. We will cover statutory duties and powers, the principle of 'ultra vires', the powers of delegation, the Welsh Language Act, the duty to promote equal opportunities and the main statutes and regulations in this area data protection and Freedom of Information act and finally, sources of advice.

#### **Module 5 - The Council Meeting**

- Calling meetings
- Types of meetings
- Standing Orders
- Agendas
- Conducting the meeting
- Passing resolutions
- Recording proceedings

During the presentation we will cover the different aspects of council meetings. We will talk about calling meetings, the different types of meetings including Annual Statutory Meetings, Extraordinary Meetings and Ordinary Meetings, the importance of Standing Orders setting and using agendas, conducting the meeting, passing resolutions, and recording proceedings.

#### Module 6 - Local Government Finance

- The Role of the Responsible Finance Officer
- Accounting and Strategy Guidance
- Financial Regulations and Risk Assessment
- Budgets and Precepts
- Internal and External Audit
- Insurance Income and Expenditure Powers
- Other Sources of Income

During the presentation we will review all the important areas in overseeing local government finance. We will cover the role of the Responsible Finance Officer, some of the general principles of accounting, the main financial regulations and, most importantly how to assess the risks involved, setting budgets and precepts, putting robust internal and external audits in place, the insurance requirements of the Council, the income and expenditure powers of the Council, and finally other sources of income.

This is a large agenda, and financial management can sometimes appear daunting, but the aim of the session is to provide you with an understanding of the financial framework of the Council, the core information you need to know and the sources of more detailed information that you should refer to when you need to.

#### Module 7 - Health & Safety

To explore the legal obligations of Councils and to highlight the processes and procedures that need to be in place to ensure compliance.

#### **Module 8 - Introduction to Community Engagement**

The aim of this introductory module is to explore what is meant by the term 'community engagement' and how councils and councillors can improve how they engage with the communities they serve. Using an interactive approach, the module explores why, how and where councillors currently engage with their communities. The session includes a short overview of key public policy in relation to community engagement and covers the key elements and terminology of community engagement. There is an opportunity for councillors to share and learn from their personal experiences and the session ends with a community engagement planning exercise.

#### **Module 9 - Code of Conduct**

A highly interactive and informative module that enables participants to understand the Nolan principles of public life and develop a more in-depth knowledge of the Code of Conduct and how it applies to local councillors.

The module specifically covers the following:

- The Nolan Principles
- What Councillors must do and must not do
- Personal/Prejudicial interests
- Predetermination & Predisposition
- How the Code is Policed

The learning will be reinforced through practical exercises and a DVD of the Ombudsman explaining his role will be featured.

#### **Module 10 - Chairing Skills**

To explore the role of the Chair and to consider the associated issues and highlight effective approaches to effective chairing of meetings.

# Module 11 - No Longer included in the programme

**Module 12 – Creating a Community Plan** To provide Councils with the knowledge and skills to create community plans and better understand strategy and forward budgeting.

#### Module 13 - Community Engagement Part II (Tools & Techniques)

To provide an insight into the way in which Councils can build on community engagement approaches and provide real leadership to help their communities and towns grow and thrive.

#### Module 14 - Equality & Diversity

Providing Councils with a better understanding of equality law and the Welsh Language Act and assisting Councils to promote equality and avoid unfair discrimination.

**Module 15 - Information Management** To provide Councils with a better understanding of the legislation relating to Data Protection and Freedom of Information.

#### Module 16 - Use of IT, Websites & Social Media

To provide Councils with a greater knowledge of the benefits of reaching out to their communities through electronic communication.

#### **Module 17 - Making Effective Grant Applications**

To enable Councils to better understand the type of grant schemes available and to put together effective applications to support capital projects.

#### **Module 18 – Managing Your Staff**

To provide an insight into the ways in which Councils can arrange for the effective management of their staff.

#### Module 19 – Devolution of Services / Community Asset Transfer

Devolution of services is currently an important topic in Wales and the challenges and opportunities it presents are / or will be of concern to most Community and Town Councils. The training module provides a highly interactive experience for councillors and clerks and covers the following key areas:

- Models for asset transfers
- Understanding lease issues and freehold transfers
- Models for and approaches to Service Devolution
- Policy Drivers
- Opportunities, Pitfalls and Planned outcomes
- Due Diligence Arrangements
- Asset Management Responsibilities
- Important role of Councillors
- Community Engagement approaches

#### Module 20 – Wellbeing of Future Generations Act 2015 / Sustainability

This course will explain the principles of Sustainable development and relate these principles to the needs and aspirations of the communities you serve, identify relevant policies (e.g. Well Being of Future Generations Act 2015) and relate them to the powers and duties of local councils ensuring readiness to lead a process of Sustainable development planning and reporting.

#### Module 21 - Understanding Local Government Finance - Advanced

This course is aimed at building on the knowledge gained from attendance at Module 6 – Local Government Finance. It will appeal especially to Chairs, those serving on Finance Committees and to any Councillor who wishes to learn more about the governance and accountability framework in which councils are required to operate.

This Module covers the following areas:

- Governance and Accountability
- Roles and Responsibilities
- The Annual Governance Statement
- The Statement of Accounts
- Internal Controls and their Review
- Compliance with the Law
- The Rights of Electors
- Risk Assessment
- Internal Audit
- Liabilities and Commitments
- Trust Funds
- Reserves and Provisions
- Investments

Module 22 - Understanding Mediation - Not available remotely, unless on a bespoke basis.

# Module 23 – Community Asset Transfer

To provide Community and Town Councils with a practical 'step-by-step' guide to taking on a Community Asset Transfer project and to raise awareness of some of the common issues that might arise and how these might be overcome. It will also highlight some of the skills that will be required and the tools that you can use to help make your CAT project successful.

#### Module 24 – Finance and Governance Toolkit

To help Community and Town Councils operate within a framework of law and good practice and to see how the Toolkit helps Councils to meet legal requirements and achieve good practice and understand that operating professionally gives the Council, Officers and Community confidence that the Council is competent in all aspects of financial management, governance and service delivery.

#### Module 25 – Biodiversity basics Part 1 and Module 26 Part 2

A 2-part course teaching Councils the basics of biodiversity, nature recovery and ecology need to make good decisions and effective Biodiversity Action plans. It follows the same '5 pillars of biodiversity' as introduced in the guidance document. After attending this course Councils will be better placed to write robust BAPs and Section 6 Reports and meet that Section 6 duty of biodiversity and ecosystem resilience.

#### **Module 27 – Nature Project Management**

A course delivered over 1 session that demonstrates the basics of project management in the context of nature and environmental projects. Handouts will include a project checklist for Councils to help them manage projects in line with Biodiversity principles, on time and in budget. It is hoped that all Councils that attend this course will have already attended the Biodiversity Basics Course first

# Appendix B

# Abertillery And Llanhilleth Community Council Councillor/Member Training Plan

This training plan has been prepared in accordance with Section 67 of the 2021 Local Government and Elections (Wales) Act
This training plan has been prepared with guidance from One Voice Wales and the Society of Local Council Clerks. This plan has been approved by Council and will be reviewed annually or, as and when a councillor or staff member requests training. (the date when the training was last completed is shown).

	New Councillor Induction	Code of Conduct	Local Govt Finance	Local Govt Finance - advanced	Chairing Skills	The Council Meeting	The Council as an Employer	Understan d-ing the Law	Planning	Health and Safety	Equality & Diversity
Module Number	n/a	9	6	21	10	5	3	4		7	14
Ben Owen-Jones		Nov 2021									
Barrie Page		Nov 2021			Feb 2023		Feb 2023				
Steve Bard		Mar 2024	Aug 2023		July 2023						
Graham White	Jul 2017	Aug 2017									
Joshua Rawcliffe	Oct 2022	Nov 2022	Nov 2022	Aug 2023	Aug 2023		Nov 2023				
Chris Hill		Jan 2024									
Nick Simmons	Jul 2017	May 2025	Nov 2019	Dec 2019	Sept 2024		Aug 2024	Nov 2018			
Peter Adamson		Jun 2025	Feb 2024								
Rob Phillips		Nov 2021	Nov 2019				Mar 2023				
Ralph Henderson		Feb 2024									
Tracey Dyson	July 2017	Nov 2023	Nov 2019		Nov 2019		Feb 2024				
Bernard Wall	July 2017	Aug 2017									
Mark Lewis	July 2017	July 2025	Feb 2024								
Bruno Goes	Jun 2024	Jun 2024	Sept 2024								
Lucy Harmer	Jun 2024	Jun 2024			Jun 2025						
Mike Whatley	Jun 2024	Oct 2024	Dec 2024								Jan 2025
Ivor Beynon		Jan 2025									
Frankie Baker		Mar 2025	Mar 2025								
Richard Catlin	Sept 2025	Sept 2025									
Sophie Townsend (YR)	Dec 2024	Dec 2024				Feb-25					
Jackson Powell (YR)	Feb 2025	May 2025									

	Introduction to Community Engagement	Community Engagement II	Effective Grant Applications	Use of Websites, IT & Social Media	Devolution of Services/Asset Transfers	Community/ Place Planning	Well-being of Future Generations Act	Finance & Governance Toolkit	Community Asset Transfers	The Council
Module Number	8	13	17	16	19		20	24	23	1
Ben Owen-Jones										
Barrie Page	Nov 2023	Nov 2023	Feb 2024	Feb 2024						
Steve Bard	May 2018							Jun 2024		
Graham White	May 2018					Feb 2018				
Joshua Rawcliffe								Jun 2024		
Chris Hill										
Nick Simmons	May 2018		Oct 2019		June 2018	Feb 2018	May 2018		Oct 2019	
Peter Adamson	May 2018									
Rob Phillips	May 2018		Oct 2018							
Ralph Henderson										
Tracey Dyson	May 2018									
Bernard Wall	May 2018									
Mark Lewis	May 2018		Oct 2018	Mar 2024			May 2018	Sept 2024	Oct 2019	
Bruno Goes										
Lucy Harmer										
Mike Whatley										
Ivor Beynon										
Frankie Baker										
Richard Catlin										
Sophie Townsend (YR)										Feb 2025
Jackson Powell (YR)										

Date approved by Council: Date of next review:

Under section 67(4) of the Local Government and Elections (Wales) Act 2021, there is a duty on councils to review the training plan.

The Councillor/Member training budget for the financial year 2025/26 is £1000

# Appendix C Abertillery and Llanhilleth Community Council Staff Training Plan

This training plan has been prepared in accordance with Section 67 of the 2021 Local Government and Elections (Wales) Act
This training plan has been prepared with guidance from One Voice Wales and the Society of Local Council Clerks. This plan has been approved by Council and will be reviewed annually or, as and when a councillor or staff member requests training. (the date when the training was last completed is shown).

Training Attended	Steve Edwards (Clerk/RFO)	Erika Davies (Deputy Clerk)	Molly Jones (Deputy Clerk)
The Council		Nov 2023	Nov 2023
Code of Conduct	Jan 2017	Dec 2023	Dec 2023
Local Govt. Finance	Mar 2017	Jan 2024	Dec 2023
Understanding the Law		Nov 2023	Nov 2023
Local Govt. Finance (Advanced)	Jul 2019		
The Council Meeting		Nov 2023	Nov 2023
Introduction to Community Engagement	May 2018		
Information Management	Sept 2017	Aug 2025	Aug 2025
Making Effective Grant Applications	Feb 2018		
Use of Websites, IT & Social Media			Feb 2024
Website Accessibility		Dec 2024	
Public Access Defibrillators		June 2024	
First Aid	Sept 2023	Jan 2025	Jan 2025
Road Closures	Nov 2022		
Rialtas Accounting	Mar 2025	Mar 2025	Mar 2025
Accelerate Climate Action		Sept 2024	Sept 2024
Terrorism Awareness		Mar 2025	Apr 2024
ILCA – Intro to Local Council Admin	Mar 2017	Dec 2023	Dec 2023
FILCA – Financial Intro to Local Council Admin		Mar 2025	May 2025
Introduction to CiLCA		Jan 2025	Jan 2025
EVAC Safety Chair	Mar 2024	Mar 2024	Mar 2024

Training Attended	Steve Edwards (Clerk/RFO)	Erika Davies (Deputy Clerk)	Molly Jones (Deputy Clerk)
Getting People Engaged with Social			Nov 2024
Media			
CiLCA – Building Your Portfolio		Nov 2025	Nov 2025
Organising Safe, Successful Events			Apr 2025
Introduction to Planning		Nov 2025	
OVW/SLCC Conference			Nov 2025

Date approved by Council: Date of next review:

Under section 67(4) of the Local Government and Elections (Wales) Act 2021, there is a duty on councils to review the training plan.

The staff training budget for the financial year 2025/26 is £1500