HELPING LOCAL COUNCILS TO SUPPORT COMMUNITIES

GAPTC

Clerk's Handover

…………………………………………………………………… Town Council/Parish Council

The Council
Full council meeting dates
Committee/sub-committee/working groups meeting dates as well as committee terms of reference
External bodies attended by councillors
Location of noticeboards and keys
The Council office/village hall – how to access, keys, alarms/codes, lighting and locking up
Councillor list and contact details
List of acronyms
List of Council staff roles and responsibilities

Organisations to contact
District/Borough Council and Councillor
County Council and Councillor
Gloucestershire Association of Parish & Town Councils (GAPTC)
Society of Local Council Clerks (SLCC)
SLCC Gloucestershire & South Gloucestershire branch
Association of Local Council Clerks – the Clerk's union (if member)
External Auditor/Internal Auditor
Contractors, e.g. grass cutting, handyman
Payroll administrator (if outsourced)

Important Documentation – check review dates
Standing Orders
Financial Regulations
Code of Conduct
Insurance Policy
Map of the Parish
Parish Plan/Parish Design Statement/Neighbourhood Development Plan (if any)
Clerk's calendar
Council Annual/Strategic Plan
Asset Register
Risk Management Policy
List of other Council policies, e.g. Data Protection; Website Accessibility; Complaints; Health & Safety; Equality & Diversity; Grievance; Disciplinary
Electoral Register

Publication scheme
Status of council – sole, managing or custodian trustees (if any)

Financial Aspects
Annual Governance & Accountability Return from previous year
Previous year-end accounts
Internal Auditor's report from previous year
Budget
Spreadsheet/accounts software/invoicing/petty cash (if used)
List of bank signatories (get yourself added on to the account as an administrator)
Date of last VAT reclaim/process for reclaiming VAT
Copy of the most recent Practitioner's Guide

Recommended training courses and reference books
New clerk training – GAPTC/SLCC
Training on council's accounts financial spreadsheet/software
Financial training – through GAPTC partner, Parkinson Partnership
Communications training – through GAPTC partner, Breakthrough Communications
Local Council Administration
Good Councillor's Guide
Good Councillor Guide to Finance & Transparency
Being a Good Employer

Passwords
Computer
Accounts software/spreadsheet
Bank account
HMRC (if doing own payroll)
PAYE Basic Tools (if doing own payroll)
Pension provider
Pension Regulator
Social media accounts
District/Borough planning website
GAPTC/NALC (if members)

Play areas/council land
Weekly/monthly inspection reports and record of maintenance
Royal Society for the Prevention of Accidents (ROSPA) inspections/documentation
Tree inspection reports
Membership of Gloucestershire Playing Fields Association
Risk assessments for council events

Allotments
Plan of allotment plots/list of occupiers
Allotment user policy
Allotment fees
Allotment waiting list
Membership of National Allotment Society
Council's responsibilities
Agreement with allotment association, if outsourced to local group
Process for invoicing tenants

Cemetery
Plan of burial plots
List of 'occupants'
Burial charges/burial ground regulations/memorial safety policy
Membership of Institute of Cemetery and Crematorium Management membership
Burial registers and process to be followed

The Council – large
Staff employment files/payroll/appraisals/professional development
Timesheet and expenses templates
Health & Safety Risk Assessments for home or office working, ie Lone working policy

Information/procedures for councils with offices/community buildings
Health & Safety
Fire Warden/fire drill
First aider
Inspections:
       Portable appliance test (PAT) for microwave/kettle/electric heaters/fridge
       Fire alarm/fire extinguisher
       Security alarm
       Accessible platform lists
       Legionella water testing
Contact details/rotas for cleaning staff

* Items in purple are on appointment, prior to being confirmed in post.