

Castle Cary is a 'Fair Trade' Town



# Castle Cary Town Council

## General Policy Paper

**Purpose:** To define the Policy for 1) How we work 2) How we raise and spend money 3) How we run our community facilities 4) How we communicate and involve the community 5) How we deal with issues affecting our town's-built environment

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## General Policy Paper

<b>1. How we work: Human Resources Policy and Council Procedures</b>	
<b>1.1 Dealing with replies to correspondence and email</b>	Aim to respond to or acknowledge 90% of external letters and emails within four working days.
<b>1.2 Telephone</b>	Answer telephone within eight rings; always have answer phone facility turned on when clerk out of the office.
<b>1.3 Administration of office functions</b>	<b>Responsibility of the Clerk as the 'Proper Officer'.</b> The Clerk's priority will be to deal with council priorities immediately, and to comply with statutory requirements: issue and publication of council and council committee agendas in sufficient time; completion of annual accounts and completion and approval of the annual return in time to send to the external auditors by the required deadline each year and notify Somerset Council of precept requirement by the statutory deadline.
<b>1.4 Committees</b>	<b>Agendas:</b> Issue 6 days in advance. All formal meetings must have an agenda with numbered items in standard format. <b>Minutes:</b> Issue minutes within 10 days of the meeting (maximum). Minutes to be in standard numbered format including allocated actions. <b>Dates of meetings:</b> Fix meeting dates for all committees well in advance, advertising them as an addendum to the agenda of each full Council meeting and also, in the case of Full Council meetings and Planning meetings, on the webpage. <b>Reports:</b> Committee reports to be pre-circulated electronically so that Council meetings can be kept free for discussion of important issues rather than lots of verbal reports <b>Terms of reference:</b> all committees have their own terms of reference,
<b>1.5 Liaison with other bodies and the Press and Media</b>	The Chair of the Council (the Vice-Chair in his/her absence) is to be regarded as the official spokesman of the Council, or the Clerk or other Councillor if authorised to do so by the Chair. Official statements should wherever practicable be reported to Councillors and agreed by the Council prior to issue. Statements made on the website should follow the same procedure. Letters and emails written on behalf of the Town Council must be copied to the Clerk before release wherever possible.
<b>1.6 Press Releases</b>	Should be approved by the Chair in advance and wherever possible within time constraints be copied to other Councillors before issue to the press/media.

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<p><b>1.7 Relationship of the Chair and Committee Chairs and other Councillors with the Clerks</b></p>	<p>The Chair of the Council must have regular contact with the Clerk at mutually convenient times at least twice a week. The Clerk is responsible for the issue of the council agenda and summons but will discuss this in advance with the Chair.</p> <p>All Councillors have the right of access to the Clerks at mutually convenient times by appointment.</p> <p>Prior to the issue of agendas for the main committees, wherever possible chairs should speak to or email the Clerk to discuss items identified for action. The Clerk is expected to confirm action when complete.</p>
<p><b>1.8 Budget and monitoring</b></p>	<p>Committee Chairs should monitor the approved budget for the current financial year. The Clerk should email appropriate spreadsheets to Committee Chairs on a monthly basis to facilitate this. This will act as a check on progress and should identify budget heads which might be considered suitable for virement. Chairs of committees must comply with the budgetary timetable as required by the Chair of the Finance Committee and review their spending requests for the following financial year by the end of September.</p>
<p><b>1.9 Employment and recruitment practice</b></p>	<p>The Council, through the work of its Human Resources Committee, will ensure that its recruitment and contracting processes are fair and effective, considering all applications and tenders on their merits.</p> <p>The Council is committed to principles of equality and diversity; no employee or contractor will be discriminated against.</p> <p>The Council will follow good practice and the guidance of NALC in agreeing terms and conditions for its employees. It will provide ongoing mentoring and performance review and support its employees in undergoing any training needed for them to do their job effectively and to develop their career.</p> <p>The Council will engage with its employees and contractors and ensure opportunities for them to raise concerns and make suggestions.</p> <p>In the case of disputes, the Council is committed to treating all employees fairly and to following good practice in seeking a resolution of the issue.</p>

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<p><b>1.10 Environmental Performance</b></p>	<p>The Council recognises that it has a responsibility to the environment and to address the climate change and ecological emergencies. We have an Environmental Policy that aims for the town to be carbon neutral by 2030. We have a draft 'Positive Vision' for the town. We have a 'Green Actions' checklist that aims to address the emergencies and focuses on actions by the Council, our suppliers and in the wider community. We are increasingly working collaboratively with other towns/parishes in the Local Community Network (LCN).</p> <p>We aim to:</p> <ul style="list-style-type: none"> <li>- Comply with and exceed all relevant regulatory requirements.</li> <li>- Take account of environmental factors in making Council decisions.</li> <li>- Use local labour and materials where appropriate and available</li> <li>- Continually improve, monitor and report our environmental performance.</li> </ul> <p>We will take actions that address the key environmental impacts of:</p> <p>Energy usage Waste production Water usage and pollution Travel emissions Biodiversity loss Procurement decisions Financial practices Planning applications</p> <p>Our Environmental Working and Advisory Group (formed in 2020) will oversee this work. This is a group currently made up of The Town Council, Ansford Parish Council and the former Greener Cary group, with an aspiration for the Chamber of Commerce and other interested groups and individuals to join.</p>
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<p><b>2. How we raise and spend money: Finance Policy</b></p>	
<p><b>2.1 General</b></p>	<p>The Finance Committee will review this policy annually and will be submit it with any recommendations for change to the full council for approval by majority vote each year.</p>

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## 2.2 Budgeting

Each year the council will set a budget for the following fiscal year (April to March). The budget should be completed by the end of October in sufficient time to:

- be presented to the whole council for approval and incorporate any modifications agreed by the full council
- allow the calculation by the clerk and approval by the full Council of the annual Precept in time to meet the District Council's requirements for submission.

The budget setting process will take into account:

a. **Overhead (revenue) Expenditure** - This covers all expenditure that is not of a capital nature and is commonly of a recurring nature. It includes salaries, insurance, office expenditure, rents, maintenance, subscriptions, purchased services etc. The basis of identifying items to be included in the forthcoming budget is the current and previous year's Overhead Expenditure.

Any new items will be added at the best current estimate of the likely cost. Any continuing items will calculate based on likely inflation and the possibility of purchasing the services/products from lower cost sources

Any items that will no longer be needed are budgeted only up to the time when they cease.

b. **Capital Expenditure** - This covers all expenditure of a non-recurring nature where the result is an increase in the assets of the Council (e.g. an extension to a building).

c. **General Reserves and Balances** - Each year amounts will be included in the budget under specific named reserves or as a general reserve. The named reserves are to accumulate funds for specific large items of expenditure that will occur at some future time (e.g. renewal of fencing) or to build a fund towards a particular capital project.

The general reserve is an un-allocated amount held to cover any large or unplanned items of expenditure (such as uninsured losses). It is also designed as an emergency fund to allow the council to operate for 2-3 months in the exceptional case where the payment of the precept is delayed for any reason. Balances refer to reserves that are carried forward unspent from previous years.

d. **Earmarked Funds** - This covers the accumulated funds from donations or other funds that have been received and are nominated by the donor for a specific named purpose. These funds are "kept in trust" by the Council, although still legally owned by the Town Council, for the purposes of the specific named reserve only, unless the specific named purpose is cancelled – in which case the council may opt to return the funds to the donor or to apply the funds to a similar purpose.

e. **Grant Requests** - The council receives requests for small grants from various organisations and a sum (not exceeding 1% of the annual precept) will optionally be allocated to a fund for assisting such grant requests. Grant requests will only receive assistance when:

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## 2.3 Precept setting

The request is in writing from a local organisation, or the local branch of a national organisation.

The grant is for a project that can be shown to be of benefit to the general community of Castle Cary

The sum of all such grants to a single organisation in any fiscal year will be limited to one fifth of the fund total grant

The annual precept should be set at the lowest level possible to:

- a. Meet the statutory duties of the Town Council and only for other items for which it is legally allowed to expend its funds.
- b. To reimburse its employees at Nationally agreed rates (where applicable) and at commercially competitive rates where National rates do not apply
- c. To cover all annual expenditure based on the expected costs of asset maintenance, office costs, insurances and all other costs that recur on an annual basis.
- d. To maintain the level of general reserves to be not more than 30% and not less than a target of 20% of the Precept. (Should reserves fall below the 20% level the Council may decide to build the reserve back to the minimum level over a maximum of five years if it is considered excessive within a single year)
- e. To include Capital projects within the Precept but only:
  - i) Where full funding is unavailable from other sources  
AND
  - ii) Where the Capital project is considered to be a significant enhancement of the facilities and/or services offered to the residents of Castle Cary, in line with the Council's Strategic Objectives AND
  - iii) There is support for the project from the residents
- f. Precept setting should take into account the expected levels of inflation and expected price increases as they affect the Town Council's expenses
- g. When setting the precept the Council will consider the use of unallocated (general) reserve balances and the possible withdrawal of any services in reducing the potential precept should it consider these to be necessary.

## 2.4 Other income

The Town Council will make charges for the use of its assets by others within the following guidelines:

- a. If used by commercial organisations the charges shall be at competitive commercial rates
- b. If used by not for profit organisations specific to Castle Cary or the Castle Cary branch of a national not for profit organisation, any charges may at the Council's discretion be reduced or waived or, if

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considered appropriate, will not exceed the proportional costs to the council.

- c. If used by non- local, non-profit organisations (such as National charities) the charges should, as a minimum, cover the proportional costs to the council
- d. Where possible any income raised will be used to offset the actual costs to the Council in maintaining the asset used. Where this is not possible the income will be placed in an earmarked reserve fund or allocated to any specific project the Council may decide.

## **2.5 Extraordinary expenses**

Where the Council is required to disburse funds for exceptional items (such as damage to assets not covered in the precept by normal maintenance or insurance), then the general reserve will be used to meet such expenses. Only where the costs exceed the general reserve will any other reserves be used, and they will be reinstated by an addition to the precept for the amount not covered by the general reserve

## **2.6 Ethical Policy**

The Council recognises that it has a responsibility to carry out all its affairs in an ethical and fair way, in respect of both its local and global impact. To this end we will work towards: purchasing goods we believe to be ethically produced and fairly traded whenever possible.

Investing all Council funds as far as possible in an agreed ethical portfolio in a bank concerned with the social and environmental impacts of its investments and loans.

## **2.7 Local Business/Shop Local**

We will use local services and purchase from local business wherever possible. If the required product or service is not available at an appropriate price then the product or service will be sourced further afield.

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<b>3. How we run our Community Facilities: Properties &amp; Infrastructure Policy</b>	
<b>3.1 Introduction</b>	The Council is committed to ensuring that Castle Cary has appropriate facilities and amenities for its inhabitants and visitors, including health, education, transport, leisure and community activities. It is also committed to conserving the architectural heritage of the town, including such historic buildings as the Market House and the Roundhouse, for the benefit of the community.
<b>3.2 Community consultation</b>	We will pro-actively listen to the views of members of the community about their needs and priorities (see the Community Involvement Policy section 2) and draw on other relevant information to inform our discussions and decision-making.
<b>3.3 Partnership working</b>	<p>We will work with external bodies, especially local authorities and government agencies, to protect, maintain and enhance existing facilities and to ensure that the town infrastructure is fit for purpose.</p> <p>We will work with local groups and members of the community to protect and enhance existing facilities and to develop new ones. For example, we may provide meeting space, administrative support, councillor time and expertise, management of funds or limited financial assistance.</p>
<b>3.4 Property Maintenance</b>	Through the work of the Properties Committee, we will maintain and repair council-owned facilities, e.g. the Pavilion and Fairfield etc., for the benefit of the whole community.
<b>3.5 Funding opportunities</b>	Identify and take advantage of funding opportunities for the enhancement or development of community facilities, where this is appropriate and financially sustainable; support fund-raising for this purpose by local groups and members of the community; levy appropriate charges for the use of council properties by others in order to help fund their maintenance.
<b>3.6 Project leadership</b>	From time to time, take the lead in major projects to enhance or develop community facilities, identified as a priority for the community
<b>3.7 Review</b>	Review this policy annually, above all in order to identify whether any facilities should be made a Council priority for the coming year.



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## 4. How we communicate and involve the community: Marketing and Communications Policy

### 4.1 Introduction

The Town Council aims to represent and respond to the views of its community and to support and/or implement actions which meet the community's needs and aspirations. (In some formal contexts this will mean Castle Cary Town Council's electorate only.) To achieve these aims the Council should interact with, inform, consult, and seek advice and help from its community in a planned, appropriate and effective way.

The Council's Marketing and Communications Committee will lead on these areas of work.

*Note: some items in this policy are the Town Council's statutory duty. Castle Cary Town Council and Somerset Council have defined responsibilities. These need to be made clear to the community in the context of any particular issue.*

### 4.2. Informing the Community

We will **keep the community informed** through:

- the Market House noticeboard
- The Cary Crier
- the quarterly Town Newsletter
- the Town website and Facebook
- press releases and interviews

### 4.3 Consulting with the Community

We will **consult with the community** through:

- Annual Town Meeting
- networking coffee mornings/community conversation
- the public sessions at council meetings
- public participation at Planning Meetings.
- attendance of CCTC representative at meetings of local organisations.
- adhoc meetings, exhibitions or consultations.
- questionnaires and surveys.
- individual councillors' discussions
- Strategic Plan Consultations
- Annual closed meeting with Ansford Parish Council

### 4.4. Advice and help from the community

Recognising that we do not have the capacity, in terms of human resource or pool of expertise, to tackle all the issues affecting the community we will be proactive in **seeking advice and help from the community** through:

- Use of voluntary help
- Co-option of local experts
- Inclusion of local non-councillors on Sub-committees
- Valuing volunteers.

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<p><b>4.5</b> <b>Achieving accessibility</b></p>	<p>We will endeavour to make all our work <b>accessible</b> by</p> <ul style="list-style-type: none"> <li>• Using a simple typeface for letters and printed material:</li> <li>• Avoiding technical jargon and complex language</li> <li>• Using large headings, simple language, few words for posters.</li> <li>• Holding public meetings wherever possible in wheelchair-accessible venues which have a hearing loop facility.</li> <li>• Planning meetings to which the public is invited at appropriate times</li> <li>• Ensuring that it sets up consultation mechanisms which appeal to and include a wide range of ages, including under 18s.</li> </ul>
<p><b>4.6.</b> <b>Other</b></p>	<p>We will</p> <ul style="list-style-type: none"> <li>• Support and encourage public participation in community projects and initiatives</li> <li>• Investigate the potential and practicability of self- help in areas where facilities were originally provided by Somerset Council but are no longer</li> <li>• Promote closer ties with Ansford Parish Council in all areas of work to ensure the interests of both communities are safeguarded.</li> <li>• Continue to support whole town events, either by participating directly in the running of them (the Tuesday Market, Christmas event) or by encouraging and supporting other community groups and businesses so to do, when these events are of general advantage to the community (eg Carnival Fair, Circus, Vintage Market).</li> </ul>

## 5. How we deal with issues affecting our town's built environment: Planning Policy

<p><b>Introduction</b></p>	<p>This section and section 5 cover general economic factors and whilst the main focus is within the parish boundary we takes into account the factors affecting neighbouring parishes and the villages that the town serves.</p> <p>Our <b>economic aim</b> is to support the maintenance and development of Castle Cary as an economically prosperous place that attracts and supports business and encourages visitors, enabling local enterprise to flourish.</p> <p>Our approach will be to support economic development but to ensure that we also enhance the quality of life and extend opportunities to local people of all backgrounds.</p>
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<p><b>5.1 Role of Full Council</b></p>	<p>Full council will direct the planning committee to investigate and provide recommendations on issues relating to conservation, town future framework and complaints or views expressed by local residents.</p>
<p><b>5.2 Planning Committee</b></p>	<p>The Town Council's planning committee will meet monthly, usually on the first Monday of each month. The committee will research, discuss and either support or withhold support for all planning applications within the town. (Note that It does not have the power to decide applications. This falls within the domain of Somerset Council which has professional planning officers.)</p>
<p><b>5.3 Conservation</b></p>	<p>Large areas of the town are protected by conservation law. Nevertheless many incidents do arise where breaches of the rules have either occurred or have been attempted. The Town Council via its planning committee and advised by the Somerset Council conservation planning department will monitor and take appropriate action.</p>
<p><b>5.4 Neighbourhood Plan</b></p>	<p>The Town Council will continue to update the plan with a group of qualified volunteers in consultation with the community and Ansford Parish Council ensuring that the result is of overall benefit to the community and is in accord with the Town Council's policy to retain the character and ambience of Castle Cary whilst supporting developments that embrace and complement these assets.</p>
<p><b>5.5 Planning Applications</b></p>	<p>The Planning Committee will:</p> <ul style="list-style-type: none"> <li>a. Consider carefully all planning applications, assessing their likely impact on listed buildings, conservation, the adjacent area and local traffic, as well as their wider impact on the town and its surrounding area as a whole, both visually and in terms of the traffic they will generate and the pressure put on the local road network.</li> <li>b. Make available to the public without delay the council's recommendations on planning applications</li> <li>c. Be proactive in identifying adjustments to conservation areas and contraventions of planning rules and taking appropriate action.</li> </ul>
<p><b>5.6 Types of development</b></p>	<p>Through its Planning Committee the Town Council will:</p> <ul style="list-style-type: none"> <li>a. Recommend the provision of appropriate industrial development of small-scale businesses that will provide both low and high tech employment opportunities and increase trade in the town.</li> <li>b. Prioritise the development of brown field sites and the sites of derelict buildings.</li> <li>c. Recommend that changes of use of town centre premises are not to the detriment of retail or other business activity.</li> </ul>

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**5.7  
Commercial  
Industrial & retail**

A designated commercial and retail zone will be defined (similar to a conservation area) whereby positive consideration will be given to domestic properties wishing to convert to commercial. Commercial properties will be discouraged from using the change of use planning application process to change to residential.

The Council will not support planning applications for development that involve the loss of a business use on a site where there is potential for it to continue.

In relation to this, the Council will consider:

- a. whether the site is in or adjacent to the Retail or Industrial Area, the size of the site and whether it could potentially provide for servicing by large vehicles
- b. whether the site is particularly suitable for small firms
- c. the accessibility of the site by public transport and by service vehicles
- d. the relationship of the site to nearby land uses,
- e. the demand, supply and variety of sites suitable for employment use.
- f. the retention of design features that enable flexible use.