

**Meeting of the Town Council
22 June**

Supporting Papers

Agenda Item 11i

Audit 2025/26

- (i) To receive and note the annual internal audit report from Westcotts Chartered Accounts.

Annual Internal Audit Report 2025/26

Budleigh Salterton Town Council

www.budleighsaltertontowncouncil.gov.uk

During the financial year ended 31 March 2026, this authority's internal auditor acting independently and on the basis of an assessment of risk, carried out a selective assessment of compliance with the relevant procedures and controls in operation and obtained appropriate evidence from the authority.

The internal audit for 2025/26 has been carried out in accordance with this authority's needs and planned coverage. On the basis of the findings in the areas examined, the internal audit conclusions are summarised in this table. Set out below are the objectives of internal control and alongside are the internal audit conclusions on whether, in all significant respects, the control objectives were being achieved throughout the financial year to a standard adequate to meet the needs of this authority.

Internal control objective	Yes	No*	Not covered**
A. Appropriate accounting records have been properly kept throughout the financial year.	✓		
B. This authority complied with its financial regulations, payments were supported by invoices, all expenditure was approved and VAT was appropriately accounted for.	✓		
C. This authority assessed the significant risks to achieving its objectives and reviewed the adequacy of arrangements to manage these.	✓		
D. The precept or rates requirement resulted from an adequate budgetary process; progress against the budget was regularly monitored; and reserves were appropriate.	✓		
E. Expected income was fully received, based on correct prices, properly recorded and promptly banked; and VAT was appropriately accounted for.	✓		
F. Cash payments were properly supported by receipts, all cash expenditure was approved and VAT appropriately accounted for.	✓		
G. Salaries to employees and allowances to members were paid in accordance with this authority's approvals, and PAYE and NI requirements were properly applied.	✓		
H. Asset and investments registers were complete and accurate and properly maintained.	✓		
I. Periodic bank account reconciliations were properly carried out during the year.	✓		
J. Accounting statements prepared during the year were prepared on the correct accounting basis (receipts and payments or income and expenditure), agreed to the cash book, supported by an adequate audit trail from underlying records and where appropriate debtors and creditors were properly recorded.	✓		
K. If the authority certified itself as exempt from a limited assurance review in 2024/25, it met the exemption criteria and correctly declared itself exempt. (If the authority had a limited assurance review of its 2024/25 AGAR tick "not covered")			✓
L. The authority published the required information on a website/webpage up to date at the time of the internal audit in accordance with the relevant legislation.	✓		
M. In the year covered by this AGAR, the authority correctly provided for a period for the exercise of public rights as required by the Accounts and Audit Regulations (during the 2025/26 AGAR period, were public rights in relation to the 2024-25 AGAR evidenced by a notice on the website and/or authority approved minutes confirming the dates set).	✓		
N. The authority has complied with the publication requirements for 2024/25 AGAR (see AGAR Page 1 Guidance Notes).	✓		
O. The authority has complied with laws, regulations & proper practices relating to digital and data compliance.	✓		
P. (For local councils only) Trust funds (including charitable) – The council met its responsibilities as a trustee.			✓

For any other risk areas identified by this authority adequate controls existed (list any other risk areas on separate sheets if needed).

Date(s) internal audit undertaken

Name of person who carried out the internal audit

17/12/2025

28/05/2026

THOMAS JOHN STUCKEY

Signature of person who carried out the internal audit

T. J. Stuckey

Date

01/06/2026

*If the response is 'no' please state the implications and action being taken to address any weakness in control identified (add separate sheets if needed).

**Note: If the response is 'not covered' please state when the most recent internal audit work was done in this area and when it is next planned; or, if coverage is not required, the annual internal audit report must explain why not (add separate sheets if needed).

TS/SJW/281014

The Town Councillors
Council Offices
Station Road
Budleigh Salterton
Devon
EX9 6RJ

1 June 2026

Dear Councillors

I write to confirm that the internal audit for 2025-26 is now complete and I enclose page 3 of the 2025-26 AGAR Report duly signed.

Usually, this signed report is the only document we provide for the completed internal audit at the year end. A letter detailing the interim review work undertaken in December 2025 has already been provided to the Council. However, if the Council wishes me to provide anything further then please let me know.

May I take this opportunity to thank Alice for her assistance, providing all information and explanations required.

You should now ensure that all the necessary statutory information and notices are published on your website stating the correct notice periods where applicable and within any required timeframe.

Please ensure you have read the detailed instructions guidance provide by PKF Littlejohn:

<https://www.pkf-l.com/services/audit-assurance/limited-assurance-regime/submission-requirements-2/>

As you will be aware, a requirement of the transparency code for small authorities states the following is to be included as publicly available documents, updated annually and uploaded on the Council website: AGAR Report, the year-end bank reconciliation, explanation of AGAR variances and the report that reconciles the difference between AGAR boxes 7 and 8 (Usually as a result of debtors, prepayments, creditors and accruals).

Once again, I would like to remind you that at least annually during a full council meeting you undertake a review to assess the significant risks to achieving the Council's objectives, and that these are clearly recorded in the full Council minutes and either the full updated risk assessment or a summary of the updated risk assessment be uploaded to your website. ✓
Many councils are now adopting a stand-alone document called a 'Statement of Internal Control' which is reviewed and published each year, which helps to support the AGAR form section 1 response given each year.

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Axminster · Barnstaple · Bideford · Bridgwater · Burnham-on-Sea · Crediton · Exeter · Holsworthy · Honiton · Okehampton · Plymouth · Seaton · Tiverton · Torquay · Weston-super-Mare

Westcotts is a trading name of Westcotts (SW) LLP, a limited liability partnership, registered in England and Wales, registration number OC432402. Registered office: 26-28 Southernhay East, Exeter, Devon EX1 1NS. A list of members' names is available at our registered office. Registered to carry on audit work in the UK, regulated for a range of investment business activities and licensed to carry out the reserved legal activity of non-contentious probate in England and Wales by the Institute of Chartered Accountants in England and Wales. Probate services are provided from our Exeter office.

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~ 2 ~

During this year's internal audit, it has come to our attention that the Section 2 report generated by your AdvantEDGE software is omitting a wage creditors of £9,655 and staff expenses creditor of £250 – Being March wage costs not paid until April. As a result of this box 4 (staff costs) should be £88,876, box 6 should be £140,150 and box 7 should be £304,762. Although the completion of Section 1 and Section 2 of the report is the Council's responsibility and not the internal auditors, we obviously do wish for you to complete the form correctly. I provide a draft version of what we believe the report should state. ✎

Where at the year-end date, any PAYE tax relating to March is not physically paid until after the year end, under the accruals accounting method a creditor adjustment should be made for this amount. To simplify the process and to ensure the wage costs are treated correctly each year, I once again recommend that the March PAYE payment to HM Revenue & Customs is made before each 31 March, thereby preventing the need to make an accrual adjustment.

Fixed assets are usually included in AGAR figures at historical cost, although some Council's do occasionally revalue assets with justification and explanation.

When previously working with Jo Vanstone, I had advised that going forward assets should remain valued at their current book value and new fixed asset additions added to the fixed asset register at cost. It is appreciated that the council may want additional columns in the register to display current market value or insured value. But these adjusted values which may fluctuate significantly between years, are not used for the AGAR report figures.

With the new AGS Assertion 10 (Digital and data Compliance), it is important that the Council's IT policy is up to date, GDPR rules are followed and data is lawfully held and processed.

Given the nature of email communication, this is not something that can be solely implemented by the Clerk, and therefore all councillors need to be acutely aware of compliance when using their gov council assigned email addresses.

Finally, as this completes my work to date, I am now taking this opportunity to enclose a note of our charges for the work undertaken on your affairs to date for your kind attention in due course. The attached is an invoice which includes VAT at the standard rate, the net fee being £840 with value added tax thereon of £168.00.

If you wish to use Westcotts' services again for the coming year, please can I ask that you minute in a full council meeting that you wish to re-appoint Stuart Carrington of Westcotts Chartered Accountants as the council's internal auditor for a further year. Provided this is the case, I will arrange the next interim review visit to take after September 2026. .

If you have any queries, then please do not hesitate to contact me.

Yours sincerely


Tom Stuckey
Director

Encs

Budleigh Salterton Town Council

Annual Internal Audit 2025-26

Where responses were 'not covered'

Internal Control Objective K

The authority was not exempt and had a limited assurance review in 2024/25.

Agenda Item 11.

Audit 2025/26

- (ii) To receive and approve the Accounts for Financial Year 1 April 2025 to 31 March 2026, all of which have been the subject of Internal Audit.

Consolidated Balance Sheet

Unaudited

31/03/25

31/03/26

£

£

Long Term assets

0.00	Long Term Debts	0.00
125,000.00	LONG TERM Investment Accounts	125,000.00
125,000.00	TOTAL LONG TERM ASSETS	125,000.00

Current assets

125,000.00	Investments	125,000.00
0.00	Investments	0.00
0.00	Stocks	0.00
8,469.13	VAT Recoverable	3,185.35
976.60	Debtors	2,484.50
0.00	Payment in Advance	0.00
138,876.82	Cash in Hand & at Bank	184,001.90
273,322.55	TOTAL CURRENT ASSETS	314,671.75
398,322.55	TOTAL ASSETS	439,671.75

Current liabilities

0.00	Loans Received	0.00
0.00	Temporary Borrowing	0.00
0.00	VAT Payable	0.00
0.00	Creditors	9,938.56
645.00	Receipts in Advance	5.00
645.00	TOTAL CURRENT LIABILITIES	9,943.56
397,677.55	TOTAL ASSETS LESS CURRENT LIABILITIES	429,728.19
0.00	Deferred Liabilities	0.00
0.00	Deferred Credits	0.00
0.00		0.00
397,677.55	NET ASSETS	429,728.19

Represented by

133,934.93	General Fund	169,745.07
22,500.00	Car Park Fund	22,500.00
50,000.00	Public Hall Fund	50,000.00
3,500.00	Jubilee Shelter Maintenance	3,500.00
5,000.00	Town Improvement Fund	5,000.00
57,742.62	CIL Fund	53,983.12
0.00	LONG TERM Investment Bank Accounts	0.00
125,000.00	CCLA Property Fund	125,000.00
0.00	Investments	0.00
0.00	Liability Reserves e.g. deposits	0.00
397,677.55		429,728.19
138,742.62	Reserves total excluding general fund and liabilities	134,983.12
0.00	Reserves total of liabilities e.g. deposits	0.00

Consolidated Balance Sheet

Unaudited

31/03/25

£

133,934.93

272,677.55

General fund total

31/03/26

£

169,745.07

304,728.19

Notes:

0.00

Long Term Borrowing

0.00

Signed

Chairman

Date

AUDIT OPINION

Alice Gater v Wadjet

Responsible Financial Officer

8.6.20

Financial Summary - Cashbook

Summary of receipts and payments between 01/04/25 and 31/03/26 inclusive. This may include transactions with ledger dates outside this period.

Balances at the start of the year

Ordinary Accounts

Lloyds Community Account	£13,876.82
Lloyds Community Instant Access	£125,000.00

Short Term Investment Accounts

Public Sector Deposit Fund	£125,000.00
Total	<u>£263,876.82</u>

RECEIPTS	Net	Vat	Gross
Council	£222,723.11	£0.00	£222,723.11
Finance Committee	£21,910.67	£0.00	£21,910.67
Public Hall Committee	£28,809.15	£0.00	£28,809.15
Community Gardens Committee	£3,839.11	£0.00	£3,839.11
Norman Centre	£2,535.00	£0.00	£2,535.00
Total Receipts	<u>£279,817.04</u>	<u>£0.00</u>	<u>£279,817.04</u>

PAYMENTS	Net	Vat	Gross
Council	£40,637.05	£5,154.46	£45,791.51
Finance Committee	£100,958.49	£2,430.47	£103,388.96
Public Hall Committee	£73,452.34	£7,807.43	£81,259.77
Community Gardens Committee	£2,699.18	£112.46	£2,811.64
Norman Centre	£1,374.07	£66.01	£1,440.08
Total Payments	<u>£219,121.13</u>	<u>£15,570.83</u>	<u>£234,691.96</u>

Closing Balances at 31/03/26

Ordinary Accounts

Lloyds Community Account	£8,761.40
Lloyds Community Instant Access	£175,240.50
	<u>£184,001.90</u>

Short Term Investment Accounts

Public Sector Deposit Fund	£125,000.00
Total	<u>£309,001.90</u>

Uncleared and Unpresented effects

Statement Closing Balance 31/03/26

Ordinary Accounts

Lloyds Community Account	£8,761.40
Lloyds Community Instant Access	£175,240.50

Short Term Investment Accounts

Public Sector Deposit Fund	£125,000.00
Total	<u>£309,001.90</u>

Reserve Balances

Car Park Fund	£22,500.00
Public Hall Fund	£50,000.00
Jubilee Shelter Maintenance	£3,500.00
Town Improvement Fund	£5,000.00
CIL Fund	£53,983.12
Reserves total	£134,983.12

Signed

Chair

Alice Gates-Wildgit
Clerk / Responsible Financial Officer

Income and Expenditure Account

Unaudited

31/03/25 £		31/03/26 £
	INCOME	
165,900.00	Precept	198,000.00
0.00	Community Infrastructure Levy	1,240.50
3,247.50	Norman Centre	3,050.00
2,576.00	EDDC Contribution	2,628.00
14,758.66	Interest on Investments	11,916.33
30,749.43	Public Hall	30,570.88
3,272.41	Community Garden Rents	3,710.28
7,480.93	Miscellaneous Income	9,994.34
227,984.93	TOTAL INCOME	261,110.33
	EXPENDITURE	
0.00	IT	2,351.25
80,124.07	Public Hall	74,394.52
2,979.74	Community Gardens	2,699.18
87,540.20	Salaries	74,044.03
13,713.00	Donations	14,911.96
935.00	S. 137 Payments	0.00
1,705.00	Audit Fee	1,790.00
32,105.17	General Administration	23,993.34
20,265.14	Miscellaneous Expenditure	28,501.34
42,415.86	Community Infrastructure Levy	5,000.00
1,618.02	Norman Centre	1,374.07
283,401.20	TOTAL EXPENDITURE	229,059.69
149,935.34	Balance as at 01/04/25	133,934.93
227,984.93	Add Total Income	261,110.33
377,920.27		395,045.26
283,401.20	Deduct Total Expenditure	229,059.69
0.00	Stock Adjustment	0.00
39,415.86	Transfer to/ from reserves	3,759.50
133,934.93	Balance as at 31/03/26	169,745.07

Signed

Chair

Alice Gates-Wildgust
Clerk / Responsible Financial Officer

9.6.26

Reserve Movements

Start of year 01/04/25

General Fund

£133,934.93 Start of year value
£169,745.07 Value as at 31/03/26

This value is calculated and not just a sum of reserve movements plus starting balance.

Car Park Fund

£22,500.00 Start of year value
£22,500.00 Current value

Public Hall Fund

£50,000.00 Start of year value
£50,000.00 Current value

Jubilee Shelter Maintenance

£3,500.00 Start of year value
£3,500.00 Current value

Town Improvement Fund

£5,000.00 Start of year value
£5,000.00 Current value

CIL Fund

£57,742.62 Start of year value
27/10/25 £1,240.50 Income transaction 7350, CIL Invome ref CIL-NP OCT25. EDDC ref CR5-232984
23/12/25 -£5,000.00 Expenditure transaction 7055, Install and removal of High Street festive lights. Grant to Shop Budleigh Min 25.185
£53,983.12 Current value
£134,983.12 Current Reserves total excluding the General Fund
£304,728.19 Current Reserves total including the General Fund

Agenda Item 11.

Audit 2025/26

- (iii) To approve and complete the Accounting Statement 2025/26 which forms part of the Annual Return.

See supporting documents for consideration before meeting please

Section 2 – Accounting Statements 2025/26 for

Budleigh Salterton Town Council

	Year ending		Notes and guidance
	31 March 2025 £	31 March 2026 £	
1. Balances brought forward	328,094	272,676	Total balances and reserves at the beginning of the year as recorded in the financial records. Value must agree to Box 7 of previous year.
2. (+) Precept or Rates and Levies	165,900	198,000	Total amount of precept (or for IDBs rates and levies) received or receivable in the year. Exclude any grants received.
3. (+) Total other receipts	62,085	63,110	Total income or receipts as recorded in the cashbook less the precept or rates/levies received (line 2). Include any grants received.
4. (-) Staff costs	104,896	89,126	Total expenditure or payments made to and on behalf of all employees. Include gross salaries and wages, employers NI contributions, employers pension contributions, gratuities and severance payments.
5. (-) Loan interest/capital repayments	0	0	Total expenditure or payments of capital and interest made during the year on the authority's borrowings (if any).
6. (-) All other payments	178,505	139,933	Total expenditure or payments as recorded in the cashbook less staff costs (line 4) and loan interest/capital repayments (line 5).
7. (=) Balances carried forward	272,676	304,727	Total balances and reserves at the end of the year. must equal (1+2+3) - (4+5+6).
8. Total value of cash and short term investments	263,877	309,001	The sum of all current and deposit bank accounts, cash holdings and short term investments held as at 31 March – To agree with bank reconciliation.
9. Total fixed assets plus long term investments and assets	2,156,554	2,154,554	The value of all the property the authority owns – it is made up of all its fixed assets and long term investments as at 31 March.
10. Total borrowings	0	0	The outstanding capital balance as at 31 March of all loans from third parties (including PWLB).

For Local Councils Only	Yes	No	
11 Do the figures in the accounting statements above exclude any trust transactions?		✓	For guidance refer to the Practitioners' Guide sections 2.31 to 2.33.

I certify that for the year ended 31 March 2026 the Accounting Statements in this Annual Governance and Accountability Return have been prepared on either a receipts and payments or income and expenditure basis following the guidance in Governance and Accountability for Smaller Authorities – a Practitioners' Guide to Proper Practices and present fairly the financial position of this authority.

Signed by Responsible Financial Officer before being presented to the authority for approval.

Alice Gettin Widdall
Date 08/06/2026

I confirm that these Accounting Statements were approved by this authority on this date:

DD/MM/YYYY

as recorded in minute reference:

MINUTE REFERENCE

Signed by Chair of the meeting where the Accounting Statements were approved

SIGNATURE REQUIRED

Bank Reconciliation

This reconciliation should include all bank and building society accounts, including short term investment accounts. It must agree to Box 8 in the column headed "Year ending 31 March" in Section 2 of the AGAR – and will also agree to Box 7 where the accounts are prepared on a receipts and payments basis.

Name of smaller authority: Budleigh Salterton Town Council

County area (local Councils and Parish meetings only): Devon *DV N00 77*

Financial year ending 31/03/26

Prepared by (Name and role): Alice Gater-Wildgust

Date: 14/04/26

Balance per bank statements as at 31/03/26	£	£
Lloyds Community Account	£8,761.40	
Lloyds Community Instant Access	£175,240.50	
Public Sector Deposit Fund	£125,000.00	
		£309,001.90
Petty cash (no balance)		£0.00
Less: any unpresented cheques		£0.00
Add: any uncleared effects		£0.00
Net balances as at 31/03/26 (Box 8)		£309,001.90

Signed

Alice Gater-Wildgust

Date

1.5.26

Reconciliation between Box 7 and Box 8 in Section 2

(applies to Accounting Statements prepared on an income and expenditure basis only)

Name of smaller authority: Budleigh Salterton Town Council

County area (local Councils and Parish meetings only): Devon

There should only be a difference between Box 7 and Box 8 where the Accounting Statements (Section 2 of the AGAR) have been prepared on an income and expenditure basis and there have been adjustments for debtors/prepayments and creditors/receipts in advance at the year end. Please provide details of the year end adjustments, showing how the net difference between them is equal to the difference between Boxes 7 and 8.

	£	£
Box 7: Balances carried forward		£304,728.19
Deduct: Debtors	-£2,484.50	
Vat	-£3,185.35	
Payments in advance	£0.00	
Stock opening value	£0.00	
Stock change	£0.00	
Total deductions	-£5,669.85	£299,058.34
Add: Creditors	£9,938.56	
Vat Payable	£0.00	
Receipts in advance	£5.00	
Total additions	£9,943.56	
		£309,001.90
Box 8: Total cash and short term investments		£309,001.90

This explains the difference between box 7 and box 8

Agenda Item 12 Insurance

Insurance Renewal Report

Broker: James Hallam & Associates
Insurer: Aviva

Premium Summary

Main Insurance Policy

2025/26 Premium: £9,093.55

Previous Year's Premium: £8,443.86

Cyber Insurance Policy

2025/26 Premium: £725.45

Previous Year's Premium: Not available

Long-Term Agreement (LTA)

James Hallam & Associates have strongly recommended that the Council enters into an extended Long-Term Agreement (LTA). The insurance market remains volatile, and an LTA would continue to provide greater security and stability in future premium costs, helping the Council to manage its budget more effectively.

Market Position

Members should note that there are currently only four insurers in the UK market that provide insurance specifically for local authorities.

As the Council was already part-way through a Long-Term Agreement, transferring cover arrangements to an alternative insurer was not considered a viable option.

James Hallam & Associates have confirmed that, due to the limited number of providers operating within this specialist sector, they are able to closely monitor market ratings and pricing. Having reviewed the available options, they are confident that the terms offered by Aviva, together with an extended Long-Term Agreement, represent the best value for the Council.

Recommendation

Members are asked to note the insurance renewal premiums and the broker's recommendation that the Council continues with Aviva and enters into an extended Long-Term Agreement to secure stability and value in a challenging insurance market.

Agenda Item 13 Meeting Dates

To note the amendment to meeting dates for 2026, as per protocol followed in 2022, 2023 & 2024, to allow for staff leave

E: office@budleighsaltertontowncouncil.gov.uk

Suggested Meeting Dates 2026. V.4

January		July	
12 th	Planning	13 th	Planning Climate Change and Environment
26 th	Planning Town Council	27 th	Planning Town Council
February		August	
9 th	Planning CIL Public Hall Climate Change and Environment	10 th	Planning – Power to Act
23 rd	Planning Town Council	24 th	Planning
March		September	
9 th	Planning Community Gardens Foreshores and Footpaths	14 th	Planning CIL Finance
12 th	Annual Parish Meeting	28 th	Planning Town Council
23 rd	Planning Town Council	October	
April		12 th	Planning Public Hall
13 th	Planning Finance	26 th	Planning Town Council
27 th	Planning Town Council	November	
May		9 th	Planning Finance Foreshore & Footpaths Community Gardens Staffing
11 th	Annual Meeting of the Town Council Planning	23 rd	Planning Town Council
18 th	Planning Town Council	December	
June		14 th	Planning Town Council
8 th	Planning Public Hall Foreshores and Footpaths		
22 nd	Planning Town Council		

Agenda Item 14 Policy and Document Review

i. To review and re-adopt the following policies:

- Code of Conduct Policy – last reviewed in 2022*
- Dignity at Work Policy - last reviewed in 2022**

ii. To review and adopt the following policies

- Equality and Diversity Policy – New*

* produced using template from NALC & HSE, legal requirement

** to support legal duties of employed require under the Equality Act 2010 to prevent discrimination and harassment, and to take reasonable steps to protect employees' wellbeing. Considered good practise

iii. To note the following:

- Asset Register (see supporting papers)

Local Government Association
Model Councillor Code of Conduct 2020

Joint statement

The role of councillor across all tiers of local government is a vital part of our country's system of democracy. It is important that as councillors we can be held accountable and all adopt the behaviors and responsibilities associated with the role. Our conduct as an individual councillor affects the reputation of all councillors. We want the role of councillor to be one that people aspire to. We also want individuals from a range of backgrounds and circumstances to be putting themselves forward to become councillors.

As councillors, we represent local residents, work to develop better services and deliver local change. The public have high expectations of us and entrust us to represent our local area, taking decisions fairly, openly, and transparently. We have both an individual and collective responsibility to meet these expectations by maintaining high standards and demonstrating good conduct, and by challenging behaviour which falls below expectations.

Importantly, we should be able to undertake our role as a councillor without being intimidated, abused, bullied, or threatened by anyone, including the general public.

This Code has been designed to protect our democratic role, encourage good conduct and safeguard the public's trust in local government.

Introduction

The Local Government Association (LGA) has developed this Model Councillor Code of Conduct, in association with key partners and after extensive consultation with the sector, as part of its work on supporting all tiers of local government to continue to aspire to high standards of leadership and performance. It is a template for councils to adopt in whole and/or with local amendments.

All councils are required to have a local Councillor Code of Conduct.

The LGA will undertake an annual review of this Code to ensure it continues to be fit-for-purpose, incorporating advances in technology, social media and changes in legislation. The LGA can also offer support, training and mediation to councils and councillors on the application of the Code and the National Association of Local Councils (NALC) and the county associations of local councils can offer advice and support to town and parish councils.

Definitions

For the purposes of this Code of Conduct, a “councillor” means a member or co-opted member of a local authority or a directly elected mayor. A “co-opted member” is defined in the Localism Act 2011 Section 27(4) as “a person who is not a member of the authority but who

- a) is a member of any committee or sub-committee of the authority, or;
- b) is a member of, and represents the authority on, any joint committee or joint sub-committee of the authority;

and who is entitled to vote on any question that falls to be decided at any meeting of that committee or sub-committee”.

For the purposes of this Code of Conduct, “local authority” includes county councils, district councils, London borough councils, parish councils, town councils, fire and rescue authorities, police authorities, joint authorities, economic prosperity boards, combined authorities and National Park authorities.

Purpose of the Code of Conduct

The purpose of this Code of Conduct is to assist you, as a councillor, in modelling the behaviour that is expected of you, to provide a personal check and balance, and to set out the type of conduct that could lead to action being taken against you. It is also to protect you, the public, fellow councillors, local authority officers and the reputation of local government. It sets out general principles of conduct expected of all councillors and your specific obligations in relation to standards of conduct. The LGA encourages the use of support, training and mediation prior to action being taken using the Code. The fundamental aim of the Code is to create and maintain public confidence in the role of councillor and local government.

General principles of councillor conduct

Everyone in public office at all levels; all who serve the public or deliver public services, including ministers, civil servants, councillors and local authority officers; should uphold the [Seven Principles of Public Life](#), also known as the Nolan Principles.

Building on these principles, the following general principles have been developed specifically for the role of councillor.

In accordance with the public trust placed in me, on all occasions:

- I act with integrity and honesty
- I act lawfully
- I treat all persons fairly and with respect; and
- I lead by example and act in a way that secures public confidence in the role of councillor.

In undertaking my role:

- I impartially exercise my responsibilities in the interests of the local community
- I do not improperly seek to confer an advantage, or disadvantage, on any person
- I avoid conflicts of interest
- I exercise reasonable care and diligence; and
- I ensure that public resources are used prudently in accordance with my local authority's requirements and in the public interest.

Application of the Code of Conduct

This Code of Conduct applies to you as soon as you sign your declaration of acceptance of the office of councillor or attend your first meeting as a co-opted member and continues to apply to you until you cease to be a councillor.

This Code of Conduct applies to you when you are acting in your capacity as a councillor which may include when:

- you misuse your position as a councillor
- Your actions would give the impression to a reasonable member of the public with knowledge of all the facts that you are acting as a councillor;

The Code applies to all forms of communication and interaction, including:

- at face-to-face meetings
- at online or telephone meetings
- in written communication
- in verbal communication
- in non-verbal communication
- in electronic and social media communication, posts, statements and comments.

You are also expected to uphold high standards of conduct and show leadership at all times when acting as a councillor.

Your Monitoring Officer has statutory responsibility for the implementation of the Code of Conduct, and you are encouraged to seek advice from your Monitoring Officer on any matters that may relate to the Code of Conduct. Town and parish councillors are encouraged to seek advice from their Clerk, who may refer matters to the Monitoring

Officer.

Standards of councillor conduct

This section sets out your obligations, which are the minimum standards of conduct required of you as a councillor. Should your conduct fall short of these standards, a complaint may be made against you, which may result in action being taken.

Guidance is included to help explain the reasons for the obligations and how they should be followed.

General Conduct

1. Respect

As a councillor:

1.1 I treat other councillors and members of the public with respect.

1.2 I treat local authority employees, employees and representatives of partner organisations and those volunteering for the local authority with respect and respect the role they play.

Respect means politeness and courtesy in behaviour, speech, and in the written word. Debate and having different views are all part of a healthy democracy. As a councillor, you can express, challenge, criticise and disagree with views, ideas, opinions and policies in a robust but civil manner. You should not, however, subject individuals, groups of people or organisations to personal attack.

In your contact with the public, you should treat them politely and courteously. Rude and offensive behaviour lowers the public's expectations and confidence in councillors.

In return, you have a right to expect respectful behaviour from the public. If members of the public are being abusive, intimidatory or threatening you are entitled to stop any conversation or interaction in person or online and report them to the local authority, the relevant social media provider or the police. This also applies to fellow councillors, where action could then be taken under the Councillor Code of Conduct, and local authority employees, where concerns should be raised in line with the local authority's councillor-officer protocol.

2. Bullying, harassment and discrimination

As a councillor:

2.1 I do not bully any person.

2.2 I do not harass any person.

2.3 I promote equalities and do not discriminate unlawfully against any person.

The Advisory, Conciliation and Arbitration Service (ACAS) characterises bullying as offensive, intimidating, malicious or insulting behaviour, an abuse or misuse of power through means that undermine, humiliate, denigrate or injure the recipient. Bullying might be a regular pattern of behaviour or a one-off incident, happen face-to-face, on social media, in emails or phone calls, happen in the workplace or at work social events and may not always be obvious or noticed by others.

The Protection from Harassment Act 1997 defines harassment as conduct that causes alarm or distress or puts people in fear of violence and must involve such conduct on at least two occasions. It can include repeated attempts to impose unwanted communications and

contact upon a person in a manner that could be expected to cause distress or fear in any reasonable person.

Unlawful discrimination is where someone is treated unfairly because of a protected characteristic. Protected characteristics are specific aspects of a person's identity defined by the Equality Act 2010. They are age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation.

The Equality Act 2010 places specific duties on local authorities. Councillors have a central role to play in ensuring that equality issues are integral to the local authority's performance and strategic aims, and that there is a strong vision and public commitment to equality across public services.

3. Impartiality of officers of the council

As a councillor:

3.1 I do not compromise, or attempt to compromise, the impartiality of anyone who works for, or on behalf of, the local authority.

Officers work for the local authority as a whole and must be politically neutral (unless they are political assistants). They should not be coerced or persuaded to act in a way that would undermine their neutrality. You can question officers in order to understand, for example, their reasons for proposing to act in a particular way, or the content of a report that they have written. However, you must not try and force them to act differently, change their advice, or alter the content of that report, if doing so would prejudice their professional integrity.

4. Confidentiality and access to information

As a councillor:

4.1 I do not disclose information:

- a. given to me in confidence by anyone
- b. acquired by me which I believe, or ought reasonably to be aware, is of a confidential nature, unless
 - i. I have received the consent of a person authorised to give it;
 - ii. I am required by law to do so;
 - iii. the disclosure is made to a third party for the purpose of obtaining professional legal advice provided that the third party agrees not to disclose the information to any other person; or
 - iv. the disclosure is:
 1. reasonable and in the public interest; and
 2. made in good faith and in compliance with the reasonable requirements of the local authority; and
 3. I have consulted the Monitoring Officer prior to its release.

4.2 I do not improperly use knowledge gained solely as a result of my role as a councillor for the advancement of myself, my friends, my family members, my employer or my business interests.

4.3 I do not prevent anyone from getting information that they are entitled to by law.

Local authorities must work openly and transparently, and their proceedings and printed materials are open to the public, except in certain legally defined circumstances. You should work on this basis, but there will be times when it is required by law that discussions, documents and other information relating to or held by the local authority must be treated in a confidential manner. Examples include personal data relating to individuals or information relating to ongoing negotiations.

5. Disrepute

As a councillor:

5.1 I do not bring my role or local authority into disrepute.

As a Councillor, you are trusted to make decisions on behalf of your community and your actions and behaviour are subject to greater scrutiny than that of ordinary members of the public. You should be aware that your actions might have an adverse impact on you, other councillors and/or your local authority and may lower the public's confidence in your or your local authority's ability to discharge your/its functions. For example, behaviour that is considered dishonest and/or deceitful can bring your local authority into disrepute.

You are able to hold the local authority and fellow councillors to account and are able to constructively challenge and express concern about decisions and processes undertaken by the council whilst continuing to adhere to other aspects of this Code of Conduct.

6. Use of position

As a councillor:

6.1 I do not use, or attempt to use, my position improperly to the advantage or disadvantage of myself or anyone else.

Your position as a member of the local authority provides you with certain opportunities, responsibilities, and privileges, and you make choices all the time that will impact others. However, you should not take advantage of these opportunities to further your own or others' private interests or to disadvantage anyone unfairly.

7. Use of local authority resources and facilities

As a councillor:

7.1 I do not misuse council resources.

7.2 I will, when using the resources of the local authority or authorising their use by others:

- a. act in accordance with the local authority's requirements; and**
- b. ensure that such resources are not used for political purposes unless that use could reasonably be regarded as likely to facilitate, or be conducive to, the discharge of the functions of the local authority or of the office to which I have been elected or appointed.**

You may be provided with resources and facilities by the local authority to assist you in carrying out your duties as a councillor.

Examples include:

- office support
- stationery
- equipment such as phones, and computers
- transport

- access and use of local authority buildings and rooms.

These are given to you to help you carry out your role as a councillor more effectively and are not to be used for business or personal gain. They should be used in accordance with the purpose for which they have been provided and the local authority's own policies regarding their use.

8. Complying with the Code of Conduct

As a Councillor:

8.1 I undertake Code of Conduct training provided by my local authority.

8.2 I cooperate with any Code of Conduct investigation and/or determination.

8.3 I do not intimidate or attempt to intimidate any person who is likely to be involved with the administration of any investigation or proceedings.

8.4 I comply with any sanction imposed on me following a finding that I have breached the Code of Conduct.

It is extremely important for you as a councillor to demonstrate high standards, for you to have your actions open to scrutiny and for you not to undermine public trust in the local authority or its governance. If you do not understand or are concerned about the local authority's processes in handling a complaint you should raise this with your Monitoring Officer.

Protecting your reputation and the reputation of the local authority

9. Interests

As a councillor:

9.1 I register and disclose my interests.

Section 29 of the Localism Act 2011 requires the Monitoring Officer to establish and maintain a register of interests of members of the authority .

You need to register your interests so that the public, local authority employees and fellow councillors know which of your interests might give rise to a conflict of interest. The register is a public document that can be consulted when (or before) an issue arises. The register also protects you by allowing you to demonstrate openness and a willingness to be held accountable. You are personally responsible for deciding whether or not you should disclose an interest in a meeting, but it can be helpful for you to know early on if others think that a potential conflict might arise. It is also important that the public know about any interest that might have to be disclosed by you or other councillors when making or taking part in decisions, so that decision making is seen by the public as open and honest. This helps to ensure that public confidence in the integrity of local governance is maintained.

You should note that failure to register or disclose a disclosable pecuniary interest as set out in **Table 1**, is a criminal offence under the Localism Act 2011.

Appendix B sets out the detailed provisions on registering and disclosing interests. If in doubt, you should always seek advice from your Monitoring Officer.

10. Gifts and hospitality

As a councillor:

- 10.1 I do not accept gifts or hospitality, irrespective of estimated value, which could give rise to real or substantive personal gain or a reasonable suspicion of influence on my part to show favour from persons seeking to acquire, develop or do business with the local authority or from persons who may apply to the local authority for any permission, licence or other significant advantage.**
- 10.2 I register with the Monitoring Officer any gift or hospitality with an estimated value of at least £50 within 28 days of its receipt.**
- 10.3 I register with the Monitoring Officer any significant gift or hospitality that I have been offered but have refused to accept.**

In order to protect your position and the reputation of the local authority, you should exercise caution in accepting any gifts or hospitality which are (or which you reasonably believe to be) offered to you because you are a councillor. The presumption should always be not to accept significant gifts or hospitality. However, there may be times when such a refusal may be difficult if it is seen as rudeness in which case you could accept it but must ensure it is publicly registered. However, you do not need to register gifts and hospitality which are not related to your role as a councillor, such as Christmas gifts from your friends and family. It is also important to note that it is appropriate to accept normal expenses and hospitality associated with your duties as a councillor. If you are unsure, do contact your Monitoring Officer for guidance.

Appendices

Appendix A – The Seven Principles of Public Life

The principles are:

Selflessness

Holders of public office should act solely in terms of the public interest.

Integrity

Holders of public office must avoid placing themselves under any obligation to people or organisations that might try inappropriately to influence them in their work. They should not act or take decisions in order to gain financial or other material benefits for themselves, their family, or their friends. They must disclose and resolve any interests and relationships.

Objectivity

Holders of public office must act and take decisions impartially, fairly and on merit, using the best evidence and without discrimination or bias.

Accountability

Holders of public office are accountable to the public for their decisions and actions and must submit themselves to the scrutiny necessary to ensure this.

Openness

Holders of public office should act and take decisions in an open and transparent manner. Information should not be withheld from the public unless there are clear and lawful reasons for so doing.

Honesty

Holders of public office should be truthful.

Leadership

Holders of public office should exhibit these principles in their own behaviour. They should actively promote and robustly support the principles and be willing to challenge poor behaviour wherever it occurs.

Appendix B Registering interests

Within 28 days of becoming a member or your re-election or re-appointment to office you must register with the Monitoring Officer the interests which fall within the categories set out in **Table 1 (Disclosable Pecuniary Interests)** which are as described in "The Relevant Authorities (Disclosable Pecuniary Interests) Regulations 2012". You should also register details of your other personal interests which fall within the categories set out in **Table 2 (Other Registerable Interests)**.

"Disclosable Pecuniary Interest" means an interest of yourself, or of your partner if you are aware of your partner's interest, within the descriptions set out in Table 1 below.

"Partner" means a spouse or civil partner, or a person with whom you are living as husband or wife, or a person with whom you are living as if you are civil partners.

1. You must ensure that your register of interests is kept up-to-date and within 28 days of becoming aware of any new interest, or of any change to a registered interest, notify the Monitoring Officer.
2. A 'sensitive interest' is as an interest which, if disclosed, could lead to the councillor, or a person connected with the councillor, being subject to violence or intimidation.
3. Where you have a 'sensitive interest' you must notify the Monitoring Officer with the reasons why you believe it is a sensitive interest. If the Monitoring Officer agrees they will withhold the interest from the public register.

Non participation in case of disclosable pecuniary interest

4. Where a matter arises at a meeting which directly relates to one of your Disclosable Pecuniary Interests as set out in **Table 1**, you must disclose the interest, not participate in any discussion or vote on the matter and must not remain in the room unless you have been granted a dispensation. If it is a 'sensitive interest', you do not have to disclose the nature of the interest, just that you have an interest. Dispensation may be granted in limited circumstances, to enable you to participate and vote on a matter in which you have a disclosable pecuniary interest.
5. [Where you have a disclosable pecuniary interest on a matter to be considered or is being considered by you as a Cabinet member in exercise of your executive function, you must notify the Monitoring Officer of the interest and must not take any steps or further steps in the matter apart from arranging for someone else to deal with it]

Disclosure of Other Registerable Interests

6. Where a matter arises at a meeting which **directly relates** to the financial interest or wellbeing of one of your Other Registerable Interests (as set out in **Table 2**), you must disclose the interest. You may speak on the matter only if members of the public are also allowed to speak at the meeting but otherwise must not take part in any discussion or vote on the matter and must not remain in the room unless you have been granted a dispensation. If it is a 'sensitive interest', you do not have to disclose the nature of the interest.

Disclosure of Non-Registerable Interests

7. Where a matter arises at a meeting which **directly relates** to your financial interest or well-being (and is not a Disclosable Pecuniary Interest set out in Table 1) or a financial interest or well-being of a relative or close associate, you must disclose the interest. You may speak on the matter only if members of the public are also allowed to speak at the meeting. Otherwise you must not take part in any discussion or vote on the matter and must not remain in the room unless you have been granted a dispensation. If it is a 'sensitive interest', you do not have to disclose the nature of the interest.
8. Where a matter arises at a meeting which **affects** –
 - a. your own financial interest or well-being;
 - b. a financial interest or well-being of a relative or close associate; or
 - c. a financial interest or wellbeing of a body included under Other Registrable Interests as set out in **Table 2**

you must disclose the interest. In order to determine whether you can remain in the meeting after disclosing your interest the following test should be applied

9. Where a matter (referred to in paragraph 8 above) **affects** the financial interest or well-being:
 - a. to a greater extent than it affects the financial interests of the majority of inhabitants of the ward affected by the decision and;
 - b. a reasonable member of the public knowing all the facts would believe that it would affect your view of the wider public interest

You may speak on the matter only if members of the public are also allowed to speak at the meeting. Otherwise you must not take part in any discussion or vote on the matter and must not remain in the room unless you have been granted a dispensation.

If it is a 'sensitive interest', you do not have to disclose the nature of the interest.

10. [Where you have an Other Registerable Interest or Non-Registerable Interest on a matter to be considered or is being considered by you as a Cabinet member in exercise of your executive function, you must notify the Monitoring Officer of the interest and must not take any steps or further steps in the matter apart from arranging for someone else to deal with it]

Table 1: Disclosable Pecuniary Interests

This table sets out the explanation of Disclosable Pecuniary Interests as set out in the [Relevant Authorities \(Disclosable Pecuniary Interests\) Regulations 2012](#).

Subject	Description
Employment, office, trade, profession or vocation	Any employment, office, trade, profession or vocation carried on for profit or gain.
Sponsorship	Any payment or provision of any other financial benefit (other than from the council) made to the councillor during the previous 12-month period for expenses incurred by him/her in carrying out his/her duties as a councillor, or towards his/her election expenses. This includes any payment or financial benefit from a trade union within the meaning of the Trade Union and Labour Relations (Consolidation) Act 1992.
Contracts	Any contract made between the councillor or his/her spouse or civil partner or the person with whom the

	<p>councillor is living as if they were spouses/civil partners (or a firm in which such person is a partner, or an incorporated body of which such person is a director* or a body that such person has a beneficial interest in the securities of*) and the council —</p> <p>(a) under which goods or services are to be provided or works are to be executed; and</p> <p>(b) which has not been fully discharged.</p>
Land and Property	<p>Any beneficial interest in land which is within the area of the council.</p> <p>'Land' excludes an easement, servitude, interest or right in or over land which does not give the councillor or his/her spouse or civil partner or the person with whom the councillor is living as if they were spouses/civil partners (alone or jointly with another) a right to occupy or to receive income.</p>
Licenses	<p>Any licence (alone or jointly with others) to occupy land in the area of the council for a month or longer</p>
Corporate tenancies	<p>Any tenancy where (to the councillor's knowledge)—</p> <p>(a) the landlord is the council; and</p> <p>(b) the tenant is a body that the councillor, or his/her spouse or civil partner or the person with whom the councillor is living as if they were spouses/civil partners is a partner of or a director* of or has a beneficial interest in the securities* of.</p>
Securities	<p>Any beneficial interest in securities* of a body where—</p> <p>(a) that body (to the councillor's knowledge) has a place of business or land in the area of the council; and</p> <p>(b) either—</p> <p>(i) the total nominal value of the securities* exceeds £25,000 or one hundredth of the total issued share capital of that body; or</p> <p>(ii) if the share capital of that body is of more than one class, the total nominal value of the shares of any one class in which the councillor, or his/her spouse or civil partner or the person with whom the councillor is living as if they were</p>

	spouses/civil partners have a beneficial interest exceeds one hundredth of the total issued share capital of that class.
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* 'director' includes a member of the committee of management of an industrial and provident society.

* 'securities' means shares, debentures, debenture stock, loan stock, bonds, units of a collective investment scheme within the meaning of the Financial Services and Markets Act 2000 and other securities of any description, other than money deposited with a building society.

Table 2: Other Registrable Interests

You must register as an Other Registerable Interest :

- a) any unpaid directorships
- b) any body of which you are a member or are in a position of general control or management and to which you are nominated or appointed by your authority
- c) any body
 - (i) exercising functions of a public nature
 - (ii) directed to charitable purposes or
 - (iii) one of whose principal purposes includes the influence of public opinion or policy (including any political party or trade union)

of which you are a member or in a position of general control or management

Appendix C – the Committee on Standards in Public Life

The LGA has undertaken this review whilst the Government continues to consider the recommendations made by the Committee on Standards in Public Life in their report on [Local Government Ethical Standards](#). If the Government chooses to implement any of the recommendations, this could require a change to this Code.

The recommendations cover:

- Recommendations for changes to the Localism Act 2011 to clarify in law when the Code of Conduct applies
- The introduction of sanctions
- An appeals process through the Local Government Ombudsman
- Changes to the Relevant Authorities (Disclosable Pecuniary Interests) Regulations 2012
- Updates to the Local Government Transparency Code
- Changes to the role and responsibilities of the Independent Person
- That the criminal offences in the Localism Act 2011 relating to Disclosable Pecuniary Interests should be abolished

The Local Government Ethical Standards report also includes Best Practice recommendations. These are:

Best practice 1: Local authorities should include prohibitions on bullying and harassment in codes of conduct. These should include a definition of bullying and harassment, supplemented with a list of examples of the sort of behaviour covered by such a definition.

Best practice 2: Councils should include provisions in their code of conduct requiring councillors to comply with any formal standards investigation and prohibiting trivial or malicious allegations by councillors.

Best practice 3: Principal authorities should review their code of conduct each year and regularly seek, where possible, the views of the public, community organisations and neighbouring authorities.

Best practice 4: An authority's code should be readily accessible to both councillors and the public, in a prominent position on a council's website and available in council premises.

Best practice 5: Local authorities should update their gifts and hospitality register at least once per quarter, and publish it in an accessible format, such as CSV.

Best practice 6: Councils should publish a clear and straightforward public interest test against which allegations are filtered.

Best practice 7: Local authorities should have access to at least two Independent Persons.

Best practice 8: An Independent Person should be consulted as to whether to undertake a formal investigation on an allegation, and should be given the option to

review and comment on allegations which the responsible officer is minded to dismiss as being without merit, vexatious, or trivial.

Best practice 9: Where a local authority makes a decision on an allegation of misconduct following a formal investigation, a decision notice should be published as soon as possible on its website, including a brief statement of facts, the provisions of the code engaged by the allegations, the view of the Independent Person, the reasoning of the decision-maker, and any sanction applied.

Best practice 10: A local authority should have straightforward and accessible guidance on its website on how to make a complaint under the code of conduct, the process for handling complaints, and estimated timescales for investigations and outcomes.

Best practice 11: Formal standards complaints about the conduct of a parish councillor towards a clerk should be made by the chair or by the parish council, rather than the clerk in all but exceptional circumstances.

Best practice 12: Monitoring Officers' roles should include providing advice, support and management of investigations and adjudications on alleged breaches to parish councils within the remit of the principal authority. They should be provided with adequate training, corporate support and resources to undertake this work.

Best practice 13: A local authority should have procedures in place to address any conflicts of interest when undertaking a standards investigation. Possible steps should include asking the Monitoring Officer from a different authority to undertake the investigation.

Best practice 14: Councils should report on separate bodies they have set up or which they own as part of their annual governance statement and give a full picture of their relationship with those bodies. Separate bodies created by local authorities should abide by the Nolan principle of openness and publish their board agendas and minutes and annual reports in an accessible place.

Best practice 15: Senior officers should meet regularly with political group leaders or group whips to discuss standards issues.

The LGA has committed to reviewing the Code on an annual basis to ensure it is still fit for purpose.



Budleigh Salterton Town Council

Dignity at Work Policy

Budleigh Salterton Town Council believes that civility and respect are important in the working environment, and expect all councillors, officers and the public to be polite and courteous when working for, and with the council.

Purpose

Budleigh Salterton Town Council is committed to creating a working environment where all council employees, councillors, contractors and others who come into contact with us in the course of our work, are treated with dignity, respect and courtesy. We aim to create a workplace where there is zero tolerance for harassment and bullying.

In support of this objective, Budleigh Salterton Town Council has signed up to the Civility Pledge, as a commitment to civility and respect in our work, and politeness and courtesy in behaviour, speech, and in the written word. Further information about the Civility and Respect Pledge is available from the National Association of Local Councils ([NALC](#)) and the Society of Local Council Clerks ([SLCC](#)).

We recognise that there is a continuum where unaddressed issues have the potential to escalate and become larger, more complex issues and this policy sets out how concerns will be managed. However the emphasis of this policy is on resolution and mediation, where appropriate, rather than an adversarial process.

This document:

- explains how we will respond to complaints of bullying or harassment;
- ensures that we respond sensitively and promptly; and,
- supports our employees in ensuring their behaviour does not amount to bullying and/or harassment by giving examples.

Scope

This policy covers bullying and harassment of and by clerks and all employees engaged to work at Budleigh Salterton Town Council. Should agency staff, or contractors have a complaint connected to their engagement with Budleigh Salterton Town Council this should be raised to their nominated contact, manager, or the Chairman of the Council (Town Mayor), in the first instance. Should the complaint be about the Chairman of the Council the complaint should be raised to the Vice Chairman (Deputy Town Mayor).

Agency staff, or contractors are equally expected to treat council colleagues, and other representatives and stakeholders with dignity and respect, and the council may terminate the contract, without notice, where there are suspicions of harassment or bullying.

Complaints about other employment matters will be managed under the council's Grievance Policy.

It is noted that the management of a situation may differ depending on who the allegations relate to (eg employees, contractor, councillor), however, the council will take appropriate action if any of its employees are bullied or harassed by employees, councillors, members of the public, suppliers or contractors.

The position on bullying and harassment

All staff and council representatives are entitled to dignity, respect and courtesy within the workplace and to not experience any form of discrimination. Budleigh Salterton Town Council will not tolerate bullying or harassment in our workplace or at work-related events outside of the workplace, whether the conduct is a one-off act or repeated course of conduct, and whether harm is intended or not. Neither will we tolerate retaliation against, or victimisation of, any person involved in bringing a complaint of harassment or bullying. You should also be aware that, if you have bullied or harassed someone (eg physical violence, harassment), in some circumstances the treatment may amount to a crime punishable by a fine or imprisonment.

We expect all representatives of the council to treat each other with respect and uphold the values of the Code of Conduct, Civility and Respect Pledge, equality opportunities policy, and all other policies and procedures set by the Council.

We expect you to demonstrate respect by listening and paying attention to others, having consideration for other people's feelings, following protocols and rules, showing appreciation and thanks, and being kind.

Allegations of bullying and harassment will be treated seriously. Investigations will be carried out promptly, sensitively and, as far as possible, confidentially. See the Grievance Policy for further details regarding the process. Employees and others who make allegations of bullying or harassment in good faith will not be treated less favourably as a result.

False accusations of harassment or bullying can have a serious effect on innocent individuals. Staff and others have a responsibility not to make false allegations. While we will assume that all complaints of bullying and harassment are made in good faith, in the event that allegations are found to be malicious or vexatious the person raising the complaint may be subject to action under the council's disciplinary procedure.

Harassment

- Where a person is subject to uninvited conduct that violates their dignity, in connection with a protected characteristic
- Behaviour that creates a hostile, humiliating, degrading or similarly offensive environment in relation to a protected characteristic

Bullying

- Behaviour that leaves the victim feeling threatened, intimidated, humiliated, vulnerable or otherwise upset. It does not need to be connected to a protected characteristic.

What Type of Treatment amounts to Bullying or Harassment?

'Bullying' or 'harassment' are phrases that apply to treatment from one person (or a group of people) to another that is unwanted and that has the effect of violating that person's dignity or creating an intimidating, hostile, degrading, humiliating, or offensive environment for that person.

Examples of bullying and harassment include:

- Physical conduct ranging from unwelcome touching to serious assault
- Unwelcome sexual advances
- The offer of rewards for going along with sexual advances eg promotion, access to training
- Threats for rejecting sexual advances
- Demeaning comments about a person's appearance
- Verbal abuse or offensive comments, including jokes or pranks related to age, disability, gender re-assignment, marriage, civil partnership, pregnancy, maternity, race, religion, belief, sex or sexual orientation
- Unwanted nicknames, especially related to a person's age, disability, gender re-assignment, marriage, civil partnership, pregnancy, maternity, race, religion, belief, sex or sexual orientation
- Spreading malicious rumours or insulting someone
- Lewd or suggestive comments or gestures
- Deliberate exclusion from conversations, work activities or social activities
- Withholding information a person needs in order to do their job
- Practical jokes, initiation ceremonies or inappropriate birthday rituals
- Physical abuse such as hitting, pushing or jostling
- Rifling through, hiding or damaging personal property
- Display of pictures or objects with sexual or racial overtones, even if not directed at any particular person
- Isolation or non-cooperation at work
- Subjecting a person to humiliation or ridicule, belittling their efforts, whether directly and/or in front of others
- The use of obscene gestures
- Abusing a position of power

Bullying and harassment can occur through verbal and face to face interactions, but can also take place through sharing inappropriate or offensive content in writing or via email and other electronic communications and social media.

It is important to recognise that conduct which one person may find acceptable, another may find totally unacceptable and behaviour could be harassment when the person had no intention to offend. We all have the right to determine what offends us. Some behaviour will be clear to any reasonable person that it is likely to offend – for example sexual touching. Other examples may be less clear, however, you should be aware that harassment will occur if behaviour continues after the recipient has advised you that the behaviour is unacceptable to them.

Harassment can also occur where the unwanted behaviour relates to a perceived characteristic (such as offensive jokes or comments based on the assumption someone is gay, even if they are not) or due to their association with someone else (such as harassment related to their partner having a disability for example). See the council's equality and diversity Policy.

All employees must, therefore, treat their colleagues with respect and appropriate sensitivity and should feel able to challenge behaviour that they find offensive even if it is not directed at them.

It is important to recognise that bullying does not include appropriate criticism of an employee's behaviour or effective, robust performance management. Constructive and fair feedback about your behaviour or performance from your manager or colleagues/Councillors is not bullying. It is part of normal employment and management routines, and should not be interpreted as anything different.

Victimisation

Victimisation is subjecting a person to a detriment because they have, in good faith, complained (whether formally or otherwise) that someone has been bullying or harassing them or someone else, or supported someone to make a complaint or given evidence in relation to a complaint. This would include isolating someone because they have made a complaint or giving them a heavier or more difficult workload.

Provided that you act in good faith, i.e. you genuinely believe that what you are saying is true, you have a right not to be victimised for making a complaint or doing anything in relation to a complaint of bullying or harassment and the council will take appropriate action to deal with any alleged victimisation, which may include disciplinary action against anyone found to have victimised you.

Making a complaint that you know to be untrue, or giving evidence that you know to be untrue, may lead to disciplinary action being taken against you.

Reporting Concerns

What you should do if you feel you are being bullied or harassed by a member of the public or supplier (as opposed to a colleague)

If you are being bullied or harassed by someone with whom you come into contact at work, please raise this with your nominated manager in the first instance or, with the clerk/or a councillor. Any such report will be taken seriously, and we will decide how best to deal with the situation, in consultation with you.

What you should do if you feel you are being bullied or harassed by a councillor

If you are being bullied or harassed by a councillor, please raise this with the clerk or the chairman of the council in the first instance. They will then decide how best to deal with the situation, in consultation with you. There are two possible avenues for you, informal or formal: the Informal Resolution is described below – Formal concerns regarding potential breaches of the Councillors Code of Conduct must be investigated by the Monitoring Officer.

The council will consider reasonable measures to protect your health and safety. Such measures may include a temporary change in duties or change of work location, not attending meetings with the person about whom the complaint has been made etc.

What you should do if you witness an incident you believe to harassment or bullying

If you witness such behaviour you should report the incident in confidence to the clerk or a councillor. Such reports will be taken seriously and will be treated in strict confidence as far as it is possible to do so.

What you should do if you are being bullied or harassed by another member of staff

If you are being bullied or harassed by a colleague or contractor, there are two possible avenues for you, informal or formal. These are described below.

Informal resolution

If you are being bullied or harassed, you may be able to resolve the situation yourself by explaining clearly to the perpetrator(s) that their behaviour is unacceptable, contrary to the council's policy and must stop. Alternatively, you may wish to ask the clerk, your nominated manager or a colleague to put this on your behalf or to be with you when confronting the perpetrator(s).

If the above approach does not work or if you do not want to try to resolve the situation in this way, or if you are being bullied by your own nominated manager, you should raise the issue with the chairman of the council. (If your concern relates to the chairman of the council, you should raise it with the Vice Chairman of the Council). The chairman (or another appropriate person) will discuss with you the option of trying to resolve the situation informally by telling the alleged perpetrator, without prejudicing the matter, that:

- there has been a complaint that their behaviour is having an adverse effect on a member of the council staff
- such behaviour is contrary to our policy
- for employees, the continuation of such behaviour could amount to a serious disciplinary offence

It may be possible for this conversation to take place with the alleged perpetrator without revealing your name, if this is what you want. The person dealing with it will also stress that the conversation is confidential.

In certain circumstances we may be able to involve a neutral third party (a mediator) to facilitate a resolution of the problem. The chairman (or another appropriate person) will discuss this with you if it is appropriate.

If your complaint is resolved informally, the alleged perpetrator(s) will not usually be subject to disciplinary sanctions. However, in exceptional circumstances (such as extremely serious allegation or in cases where a problem has happened before) we may decide to investigate further and take more formal action notwithstanding that you raised the matter informally. We will consult with you before taking this step.

Raising a formal complaint

If informal resolution is unsuccessful or inappropriate, you can make a formal complaint about bullying and harassment through the council's grievance procedure. You should raise your complaint to the clerk or the chairman of the council. A formal complaint may ultimately lead to disciplinary action against the perpetrator(s) where they are employed.

The clerk or the chairman of the council will appoint someone to investigate your complaint in line with the grievance policy. You will need to co-operate with the investigation and provide the following details (if not already provided):

- The name of the alleged perpetrator(s)
- The nature of the harassment or bullying
- The dates and times the harassment or bullying occurred
- The names of any witnesses
- Any action taken by you to resolve the matter informally

The alleged perpetrator(s) would normally need to be told your name and the details of your grievance in order for the issue to be investigated properly. However, we will carry out the investigation as confidentially and sensitively as possible. Where you and the alleged perpetrator(s) work in proximity to each other, we will consider whether it is appropriate to make temporary adjustments to working arrangements whilst the matter is being investigated.

Where your complaint relates to potential breaches of the Councillors Code of Conduct, these will need to be investigated by the Monitoring Officer. The council will consider any adjustments to support you in your work and to manage the relationship with the councillor the allegations relate to, while the investigation proceeds.

Investigations will be carried out promptly (without unreasonable delay), sensitively and, as far as possible, confidentially. When carrying out any investigations, we will ensure that individuals' personal data is handled in accordance with the data protection policy.

The council will consider how to protect your health and wellbeing whilst the investigation is taking place and discuss this with you. Depending on the nature of the allegations, the Investigator may want to meet with you to understand better your complaint (see the Grievance Policy for further information, and details of your right to be accompanied).

After the investigation, a panel will meet with you to consider the complaint and the findings of the investigation in accordance with the grievance procedure. At the meeting you may be accompanied by a fellow worker or a trade union official.

Following the conclusion of the hearing the panel will write to you to inform you of the decision and to notify you of your right to appeal if you are dissatisfied with the outcome. You should put your appeal in writing explaining the reasons why you are dissatisfied with the decision. Your appeal will be heard under the appeal process that is described in the grievance procedure.

The use of the Disciplinary Procedure

If at any stage from the point at which a complaint is raised, we believe there is a case to answer and a disciplinary offence might have been committed, we will instigate our disciplinary procedure. We will keep you informed of the outcome.

This is a non-contractual policy and procedure which will be reviewed from time to time.



Budleigh Salterton Town Council Equality and Diversity Policy

Draft

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Our commitment

The council is committed to providing equal opportunities in employment and to avoiding unlawful discrimination.

This policy is intended to assist the council to put this commitment into practice. Compliance with this policy should also ensure that employees do not commit unlawful acts of discrimination.

Striving to ensure that the work environment is free of harassment and bullying and that everyone is treated with dignity and respect is an important aspect of ensuring equal opportunities in employment.

The law

It is unlawful to discriminate directly or indirectly in recruitment or employment because of age, disability, sex, gender reassignment, pregnancy, maternity, race (which includes colour, nationality, caste and ethnic or national origins), sexual orientation, religion or belief, or because someone is married or in a civil partnership. These are known as "protected characteristics".

Discrimination after employment may also be unlawful, e.g. refusing to give a reference for a reason related to one of the protected characteristics.

The council will not discriminate against or harass a member of the public in the provision of services or goods. It is unlawful to fail to make reasonable adjustments to overcome barriers to using services caused by disability. The duty to make reasonable adjustments includes the removal, adaptation or alteration of physical features, if the physical features make it impossible or unreasonably difficult for disabled people to make use of services. In addition, service providers have an obligation to think ahead and address any barriers that may impede disabled people from accessing a service.

Types of unlawful discrimination

Direct discrimination is where a person is treated less favourably than another because of a protected characteristic.

In limited circumstances, employers can directly discriminate against an individual for a reason related to any of the protected characteristics where there is an occupational requirement. The occupational requirement must be crucial to the post and a proportionate means of achieving a legitimate aim.

Indirect discrimination is where a provision, criterion or practice is applied that is discriminatory in relation to individuals who have a relevant protected characteristic such that it would be to the detriment of people who share that protected characteristic compared with people who do not, and it cannot be shown to be a proportionate means of achieving a legitimate aim.

Harassment is where there is unwanted conduct, related to one of the protected characteristics (other than marriage and civil partnership, and pregnancy and maternity) that has the purpose or effect of violating a person's dignity; or creating an intimidating, hostile, degrading, humiliating or offensive environment. It does not matter whether or not this effect was intended by the person responsible for the conduct.

Associative discrimination is where an individual is directly discriminated against or harassed for association with another individual who has a protected characteristic.

Perceptive discrimination is where an individual is directly discriminated against or harassed based on a perception that they have a particular protected characteristic when they don't, in fact, have that protected characteristic.

Third-party harassment occurs where an employee is harassed and the harassment is related to a protected characteristic, by third parties.

Victimisation occurs where an employee is subjected to a detriment, such as being denied a training opportunity or a promotion because they made or supported a complaint or raised a grievance under the Equality Act 2010, or because they are suspected of doing so. However, an employee is not protected from victimisation if they acted maliciously or made or supported an untrue complaint.

Failure to make reasonable adjustments is where a physical feature or a provision, criterion or practice puts a disabled person at a substantial disadvantage compared with someone who does not have that protected characteristic and the employer has failed to make reasonable adjustments to enable the disabled person to overcome the disadvantage.

Equal opportunities in employment

The council will avoid unlawful discrimination in all aspects of employment including recruitment, promotion, opportunities for training, pay and benefits, discipline and selection for redundancy.

Recruitment

Person and job specifications will be limited to those requirements that are necessary for the effective performance of the job. Candidates for employment or promotion will be assessed objectively against the requirements for the job, taking account of any reasonable adjustments that may be required for candidates with a disability. Disability and personal or home commitments will not form the basis of employment decisions except where necessary.

Working practices

The council will consider any possible indirectly discriminatory effect of its standard working practices, including the number of hours to be worked, the times at which these are to be worked and the place at which work is to be done, when considering requests for variations to these standard working practices and will refuse such requests only if the council considers it has good reasons, unrelated to any protected characteristic, for doing so. The council will comply with its obligations in relation to statutory requests for contract variations. The council will also make reasonable adjustments to its standard working practices to overcome barriers caused by disability.

Equal opportunities monitoring

The council will monitor the ethnic, sex/gender and age composition of the existing workforce and of applicants for jobs (including promotion), and the number of people with disabilities within these groups, and will consider and take any appropriate action to address any problems that may be identified as a result of the monitoring process.

The council treats personal data collected for reviewing equality and diversity in accordance with the data protection policy. Information about how data is used and the basis for processing is provided in the council's privacy notices.

Dignity at work

The council has a separate dignity at work policy concerning issues of bullying and harassment on any ground, and how complaints of this type will be dealt with.

People not employed by the council

The council will not discriminate unlawfully against those using or seeking to use the services provided by the council.

You should report any bullying or harassment by suppliers, visitors or others to the council who will take appropriate action.

Training and prevention

The council will [provide training in/raise awareness of] equal opportunities to those likely to be involved in recruitment or other decision making where equal opportunities issues are likely to arise.

The council will [provide training to/raise awareness of] all staff engaged to work at the council to help them understand their rights and responsibilities under the dignity at work policy and what they can do to help create a working environment free of bullying and harassment. [The council will provide additional training to managers to enable them to deal more effectively with complaints of bullying and harassment.]

[We have carried out an assessment to assess the risk of different forms of harassment, including sexual harassment and third-party harassment, occurring in our workforce, including in [different roles [and departments]], the steps we could take to reduce those risks and which of those possible steps are reasonable. This risk assessment will be reviewed [regularly OR annually]. [The current assessment is available on the [Intranet].

[We will take active steps to try to prevent third-party harassment of staff. If any third-party harassment of staff occurs, we will take steps to remedy any complaints and to prevent it happening again. Action may include warning the harasser about their behaviour, banning them from our premises, reporting any criminal acts to the police, and sharing information with other branches of the business.]

Your responsibilities

Every employee is required to assist the council to meet its commitment to provide equal opportunities in employment and avoid unlawful discrimination. Employees can be held personally liable as well as, or instead of, the council for any act of unlawful discrimination. Employees who commit serious acts of harassment may be guilty of a criminal offence.

Acts of discrimination, harassment, bullying or victimisation against employees or customers are disciplinary offences and will be dealt with under the council's disciplinary procedure. Discrimination, harassment, bullying or victimisation may constitute gross misconduct and could lead to dismissal without notice.

Grievances

If you consider that you may have been unlawfully discriminated against, you should use the council's grievance procedure to make a complaint. If your complaint involves bullying or harassment, the grievance procedure is modified as set out in the dignity at work policy.

The council will take any complaint seriously and will seek to resolve any grievance that it upholds. You will not be penalised for raising a grievance, even if your grievance is not upheld, unless your complaint is both untrue and made in bad faith.

Monitoring and review

This policy will be monitored periodically by the council to judge its effectiveness and will be updated in accordance with changes in the law. [In particular, the council will monitor the treatment and outcomes of any complaints of harassment, sexual harassment or victimisation we receive to ensure that they are properly investigated and resolved, those who report or act as witnesses are not victimised, repeat offenders are dealt with appropriately, cultural clashes are identified and resolved and workforce training is targeted where needed; the ethnic and gender composition of the existing workforce and of applicants for jobs (including promotion), and the number of people with disabilities within these groups, and will review its equal opportunities policy in accordance with the results shown by the monitoring . If changes are required, the council will implement them.

Information provided by job applicants and employees for monitoring purposes will be used only for these purposes and will be dealt with in accordance with relevant data protection legislation.]

This is a non-contractual procedure which will be reviewed from time to time.

Date of policy:

Approving committee:

Date of committee meeting:

Policy version reference:

Supersedes:

Policy effective from:

Date for next review:

— policy ends here —

Notes

This is an example policy that should be adjusted to reflect the procedures and policy of the council. It is important that any commitment made in the policy is applied in practice.

1. Green Book terms

The Green Book sets out practical principles that councils can adopt and acknowledges that local councils will need to select the appropriate measures to match their circumstances.

The guidance covers:

- Developing and action plan to establish and monitor progress
- Recruitment and Selection Procedures
- Training
- Pay, Grading and Conditions of Service
- Dealing with Harassment

Guidance

Where there is text in [square brackets] this part may be updated or be deleted if not relevant. An alternative option may have been provided.

Important notice

This is an example of an employment policy designed for a small council adhering to statutory minimum requirements and does not constitute legal advice. As with all policies it should be consistent with your terms and conditions of employment.

This document was commissioned by the National Association of Local Councils (NALC) in 2019 for the purpose of its member councils and county associations. Every effort has been made to ensure that the contents of this document are correct at time of publication. NALC cannot accept responsibility for errors, omissions and changes to information subsequent to publication.

This document has been written by the Worknest HR – a company that provides HR advice and guidance to town and parish councils. Please contact them on 01403 240 205 for information about their services.

Fixed assets list

Asset No.	Ref.	Description	Location	Purchased from	Purchase date	Cost	Current Value	Yr Start Value	Insurance Value	Renewal	Previous Value
Buildings											
1	01	Public Hall	Station Road			£0.00	£1,696,000.00	£1,696,000.00	£2,603,364.00	01/06/26	
25	25	Station Road Toilets				£1.00			£194,400.00	01/06/26	
Total Values						£1.00	£1,696,000.00	£1,696,000.00	£2,797,764.00		
Chamber Contents											
9	09	Chairs - Leather x20	Chamber			£0.00	£4,250.00	£4,250.00	£4,250.00	01/06/26	
10	10	Tables x2	Chamber			£0.00	£2,000.00	£2,000.00	£2,000.00	01/06/26	
Total Values						£0.00	£6,250.00	£6,250.00	£6,250.00		
Community Assets											
3	03	Paintings x8	Public Hall & Fairlynych			£0.00	£13,485.00	£13,485.00	£16,859.00	01/06/26	
4	04	Silver Spade And Engine Plate	Fairlynych			£0.00	£23,000.00	£23,000.00	£25,960.00	01/06/26	£6,206.00
5	05	Civic Regalia & Ceremonial Effects	Chamber	Additions: Shaw & Sons / Andrew Humphries 03.1999		£0.00	£2,550.00	£2,550.00	£3,453.00	01/06/25	£10,294.00
13	13	Defibrillators x3	Public Hall x1 Seaffront x2	Community Heartbeat Trust	30/04/2017	£3,850.00	£3,850.00	£3,850.00	£6,712.00	01/06/26	
14	14	War Memorial	Coastguard Hill			£0.00	£125,000.00	£125,000.00	£159,842.00	01/06/26	£6,044.00
17	17	Jubilee Shelter	Marine Parade			£0.00	£95,982.00	£95,982.00	£147,333.00	01/06/26	
20	20	Drinking Fountain (Jubilee Shelter)	Marine Parade	Gentworks		£487.00	£490.00	£490.00	£751.00	01/06/26	
22	22	Jubilee Plinth	Marine Parade	Orchard Memorials	01/05/2022	£1,523.70	£1,523.70	£1,523.70	£1,800.00	01/06/26	
24	24	Drinking Fountain		Thirstyworks	01/11/2025	£1,800.00	£1,800.00	£1,800.00			

Asset No.	Ref.	Description	Location	Purchased from	Purchase date	Cost	Current Value	Yr Start Value	Insurance Value	Renewal	Previous Value
Hall Contents											
6	06	Banqueting Chairs x250	Public Hall	Allen Pavitt	02/04/2011	£16,855.10	£16,855.10	£16,855.10	£16,855.00	01/06/26	
7	07	Curtains	Public Hall & Chamber	Devon County Council	31/03/2006	£5,000.00	£5,000.00	£5,000.00	£5,000.00	01/06/26	
8	08	CCTV Cameras x 9 and Recorder	Public Hall	Tamar Security	01/08/2017	£2,666.50	£3,388.00	£3,388.00	£5,182.00	01/06/26	
16	16	General Contents	Public Hall & Chamber			£0.00	£10,337.00	£10,337.00	£59,114.00	01/06/26	
18	18	Banqueting chairs x30	Norman Centre	Allen Pavitt	17/08/2019	£2,200.00	£2,200.00	£2,200.00	£2,200.00	01/06/26	
19	19	Intruder Alarm (insured with CCTV)	Public Hall	Bagwells	25/02/2019	£625.00	£0.00	£0.00	£0.00	01/06/26	£0.00
21	21	Christmas Lights	Public Hall			£5,000.00	£1,200.00	£1,200.00	£7,533.00	01/06/26	
						Total Values	£38,980.10	£38,980.10	£95,884.00		£0.00
Land & Buildings											
15	15	Gates (Community Gardens)	Community Gardens, Greenway Lane			£0.00	£1,814.00	£1,814.00	£2,785.00	01/06/26	
						Total Values	£0.00	£1,814.00	£2,785.00		
Office Equipment											
2	02	Laptops x3	Offices	Dell/HP/Lenovo	01/06/2019	£1,771.00	£2,683.00	£2,683.00	£2,213.00	01/06/26	
11	11	Photocopier	Offices	Leased from Canon UK	17/09/2010		£2,783.00	£2,783.00	£2,783.00	01/06/26	
12	12	General office equipment	Offices			£0.00	£11,443.00	£11,443.00	£19,007.00	01/06/26	
23	23	Tablets	Public Hall and with Councillors	Amazon	03/12/2024	£1,920.00	£1,920.00	£1,920.00	£1,920.00	01/06/26	

Agenda Item 15: Community Workshop**Decision Required:**

To receive and consider the report from the Public Hall Committee, assessing the advantages and disadvantages of the following request, and to agree on an appropriate course of action.

Author: PH Committee

Noting that the Public Hall Committee gave consideration to this required at their most recent meeting and felt that this was a weighty decision and, rather than making a recommendation to the Town Council, agreed to prepare a list of the proposal's pros and cons for future consideration **[Min 26.71]**

Original request from the Community Workshop

The Community Workshop (CW) would like to have 3 toilet cubicles plus the same section of the service corridor and to convert this area into a Machine Workshop (MW)

In this new MW CW would put the cutting and noisy machines to allow more space and reduce the noise in the CW which this morning was very busy.

CW would install a pair of double doors for access in the left-hand wall of the service corridor, as you walk in, where they have permission to install an awning adjacent to the CW. Physically this could be achieved with some alterations to the existing services but at the end nearest the Public Hall.

CW would engage professionals to advise on the feasibility of the alterations etc.
CW have funds to carry out the works in a progressive manner.

Advantages

1. BSTC could generate an income from the rental which could contribute towards the cleaning costs.
2. All development, professional, building work costs etc are to be met by CW incl any time spent by BSTC, Town Clerk, Caretaker etc.

Disadvantages

1. There will be a requirement to engage professionals to prepare legal documents.
2. Possible requirement for planning permission to be sought
3. Noise issues ??
4. If agreed in principle CW would engage Professionals to carry out a feasibility study.
5. Long term lease ?
6. Only 3 toilets left operational - is this enough ??

Agenda Item 16i**Jubilee Shelter – Remedial Works****Purpose of Report**

To consider quotations received and appoint a contractor to undertake remedial works to the Jubilee Shelter.

Background

The walls and benches within the Jubilee Shelter have become heavily weathered and are now in need of refurbishment. Quotations were sought to recondition the shelter and improve its overall appearance and condition.

Quotations Received

Contractor	Quotation
Bagwells	£4,175.00
Montgomery Coats	£1,950.00

Assessment of Quotations

Both contractors inspected the shelter and submitted quotations. However, there is a notable difference in the scope of works proposed.

- **Bagwells** included additional works to address potential water ingress issues identified during their inspection. This resulted in a higher quotation of £4,175.00.
- **Montgomery Coats** advised that water ingress remediation was not considered necessary at this stage and therefore priced only for the refurbishment works outlined in the original brief. Their quotation totalled £1,950.00.

Members should therefore note that the quotations are not directly comparable, as Bagwells have included works beyond the original specification. It should be further noted that Montgomery Coates have assessed the shelter as not needing such extensive works, at the present time.

Financial Implications

The lowest quotation received is £1,950.00 from Montgomery Coats.

Recommendation

Members are requested to:

1. Note the quotations received for the Jubilee Shelter remedial works.
2. Appoint a contractor to carry out the currently required works to the Jubilee Shelter.
3. Use Budget 'Jubilee Shelter' and balance from Jubilee Shelter reserve.
Budget payment: £1802.50. Reserve for balance.
4. To assess what larger future works may be required in the medium / long term and budget accordingly.

RE: Jubilee Shelter, Budleigh

From Estimating <estimating@bagwells.co.uk>

Date Thu 2026-04-23 1:37 PM

To Alice Gater-Wildgust <alice.gater-wildgust@budleighsaltertontowncouncil.gov.uk>

Hi Alice,

Thank you for your email, for which we respond as follows:

You have made no request to investigate and rectify the water ingress issues, generally from the flat roof terrace area.

Water is causing considerable damage to the fabric of the Jubilee Shelter.

We understand that Rockfish now rent the LH side access doors, so our estimate is based upon the front shelter area only, but does include redecorating the fascia to 3 sides.

SPECIFICATION:

We have included a **Provisional Sum of £1,000.00** for render repairs following the decorators' preparation. (**Note: these will merely be cosmetic repairs for the decoration work and WILL NOT rectifying the water ingress issue, so defects WILL reappear over time).**

We have based our estimate on the following areas:

- Fascia to 3 sides.
- Walls & Ceiling of Main Shelter Enclosure.
- Walls & Ceiling of LH Side Shelter / Seating Area.
- Timber & metalwork of Main Shelter Seating.

Masonry surfaces – prep followed by 1 sealer coat to filler etc and 2 full coats to all previously painted masonry.

Woodwork (seats) – prep followed by 2 full coats of Barn Paint (*or similar*).

Metalwork (seat brackets) – prep, spot prime any bare areas followed by 2 coats of Smoothrite (*or similar*).

All for the sum of £4,175.00 + VAT (inc Prov Sum).

Kind regards,

Martyn French
Estimator
Bagwells Ltd

tel 01395 577194
estimating@bagwells.co.uk

From: Alice Gater-Wildgust <alice.gater-wildgust@budleighsaltertontowncouncil.gov.uk>

Sent: 21 April 2026 09:54

To: Estimating <estimating@bagwells.co.uk>

Subject: Re: Jubilee Shelter, Budleigh

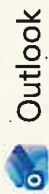
Dear Martyn

Thank you.

The brief is simple: recondition the walls and benches of the jubilee shelter. They are at present very weathered. There is no project brief that is detailed. This is a straightforward piece of work.

If you are interested in providing a quote I would be please to receive it.

Kr,



RE: Quote

From Enquiries MC <Enquiries@montgomerycoates.com>

Date Tue 2026-03-31 10:37 AM

To Alice Gater-Wildgust <alice.gater-wildgust@budleighsaltertontowncouncil.gov.uk>

Good morning; Alice,

Our quotation for the Jubilee Shelter on Budleigh Salterton seafront comes to the sum of £1950.00 + VAT. This includes all preparation/repairs and two coats of masonry paint to the walls and ceilings (interior and exterior) and the bench inside the shelter.

Best regards,

Danny Toze



Station Road

Sidmouth

Devon

EX10 8NN

Tel: 01395 577106

Fax: 01395 579165

e-mail: enquiries@montgomerycoates.com

From: Alice Gater-Wildgust <alice.gater-wildgust@budleighsaltertontowncouncil.gov.uk>

Sent: 27 March 2026 08:24

To: Enquiries MC <Enquiries@montgomerycoates.com>

Subject: Re: Quote

Brilliant, thank you Danny.

Kr,

Agenda Item: 16ii**Decision required:**

To consider the findings of a recent inspection of the office boiler and to accept the recommendation of GNS heating, our provider for boiler servicing, to install a replacement boiler with similar specifications in order to provide heating and hot water to the council offices.

Cost: £2901.00 plus VAT.

Background

Following a planned maintenance visit, the attending engineer identified that the existing office gas boiler is in an unsafe condition. The boiler flue has deteriorated significantly and is reported to be completely corroded, resulting in combustion products leaking from the system. The appliance has been isolated and made safe by the engineer.

The engineer has advised that, due to the age and overall condition of the boiler, it is beyond economical repair. A quotation for the installation of a replacement system has subsequently been provided.

Other options investigated by the supplier:

Due to the location, it would not be possible to install a ground source heat pump. Installation of an air source heat pump, or a split AC unit that provides heating and cooling requires large alterations to the system and the cost implications would be far higher. Electric boilers are considered unadvisable unless there are a lot of Solar PV panels, we would likely require a new 3 phase supply installed too depending on size of the system. Installing an Air source heat pump - the return of investment would take years to recoup the money therefore from a cost perspective you are often always best to stick with a gas boiler, though there is course viable options we can investigate though on this occasion my person opinion is a gas boiler is the best option.

The contractor's professional opinion is that replacement with a modern gas boiler represents the most practical and cost-effective solution for the building. This option would:

- Replace the unsafe appliance promptly.
- Minimise disruption to building operations.
- Utilise the existing heating infrastructure.
- Involve the lowest capital expenditure compared with alternative technologies.
- Provide the best value for money in the foreseeable future.

To note: at present the office is without a functioning heating system.