

## ChALC Virtual Training Schedule 2024 - course sessions planned for the year

For the calendar of dates and details of individual session outlines please scroll down this document

### Programme Details:

To support councils' development needs, ChALC aims to provide a rolling programme of our core training offer throughout the year. Set out on the pages below is the schedule calendar for 2024, and below that details including the session names, the topics to be covered, and the approximate length of the session. Please scroll down to see all dates etc.

The session length is only an indication of the time as delegates are encouraged to ask questions and engage so sometimes a session may overrun (and sometimes it may be a little shorter).

Please note that from time to time we will ask external trainers to provide ad hoc sessions for ChALC on more specific subjects to enhance the learning offer. **These will be listed, and the schedule updated, as they become available.** The schedule also includes some national training offers.

Providers and relevant course dates are colour coded as follows: -

<b>Trainer</b>	<b>Session Cost</b>	<b>Trainer</b>	<b>Session Cost</b>	<b>Trainer</b>	<b>Session Cost</b>
<b>ChALC</b>	£25 member £40 non-member	<b>Parkinson Partnership</b>	£30 member £45 non-member		
<b>Trainer</b>	<b>Session Cost</b>	<b>Trainer</b>	<b>Session Cost</b>	<b>Trainer</b>	<b>Session Cost</b>
<b>David Kaiserman</b>	£30 member £45 non-member	<b>Breakthrough Communications</b>	£30 member £45 non-member	<b>UK Ducks-in-a Row</b>	£30

**N.B. All sessions listed will be VIRTUAL unless specified.** Please check course availability and make a booking by contacting [sharonangus-crawshaw@chalc.org.uk](mailto:sharonangus-crawshaw@chalc.org.uk) or [nikkiroberts@chalc.org.uk](mailto:nikkiroberts@chalc.org.uk)

**Cancellation Policy** - if you find yourself unable to attend any session please contact [Nikkiroberts@chalc.org.uk](mailto:Nikkiroberts@chalc.org.uk) or [sharonangus-crawshaw@chalc.org.uk](mailto:sharonangus-crawshaw@chalc.org.uk) immediately. Bookings cancelled with less than 48 hours notice or 'no shows' will be charged at the full price advertised. Extenuating circumstances will be considered but must be advised as soon as possible.

## Schedule Calendar – ChALC

### February 2024

- 6th Introduction to the LCAS 1pm – 2pm
- 13<sup>th</sup> Induction for councillors and clerks  
6pm – 8pm
- 15<sup>th</sup> Induction for councillors and clerks  
1.30pm – 3.30pm

### March 2024

- 5<sup>th</sup> Roles and Responsibilities 6pm – 8pm
- 7<sup>th</sup> Roles and Responsibilities  
1.30pm – 3.30pm **CANCELLED**

### April 2024

- 16<sup>th</sup> Meetings and Procedures 6pm – 8pm
- 23<sup>rd</sup> Meetings and Procedures  
1.30pm – 3.30pm

### June 2024

- 4<sup>th</sup> Introduction to the LCAS 1pm – 2pm
- 11<sup>th</sup> Chairmanship 6pm – 8pm
- 13<sup>th</sup> Chairmanship 1.30pm – 3.30pm
- 18<sup>th</sup> Warrington Code of Conduct  
1.30pm – 3.30pm
- 18<sup>th</sup> CEC Code of Conduct 6pm – 8pm

### July 2024

- 9<sup>th</sup> General Power of Competence  
6pm – 8pm
- 11<sup>th</sup> General Power of Competence 1.30pm  
– 3.30pm

### August 2024

TBC

### September 2024

- 10<sup>th</sup> Induction for councillors and clerks  
6pm – 8pm
- 19<sup>th</sup> Induction for Councillors and Clerks  
1.30pm – 3.30pm
- 26<sup>th</sup> CWaC Code of Conduct 6pm – 8pm

### October 2024

- 3<sup>rd</sup> Roles and Responsibilities 1.30pm –  
3.30pm
- 8<sup>th</sup> Roles and Responsibilities 6pm – 8pm
- 15<sup>th</sup> Warrington Code of Conduct 6pm –  
8pm

### November 2024

- 5<sup>th</sup> CEC Code of Conduct 6pm – 8pm
- 12<sup>th</sup> Meetings and Procedures 6pm – 8pm
- 14<sup>th</sup> Meetings and Procedures  
1.30pm – 3.30pm

### December 2024

- 3<sup>rd</sup> Chairmanship 6pm – 8pm
- 12<sup>th</sup> Chairmanship 1.30pm – 3.30pm

## Schedule Calendar – external providers

### March 2024

- 5<sup>th</sup> Procurement  
10am – 11.30am
- 6<sup>th</sup> Internal Controls  
10.00am – 11.30am
- 7<sup>th</sup> Year end & transparency – councils  
under £25,000 10am – 11.30am
- 12<sup>th</sup> Income & Expenditure accounting (for  
larger councils) 10am – 11.30am
- 14<sup>th</sup> Year end & audit – councils over  
£25,000 10am – 11.30am
- 19<sup>th</sup> Year end & transparency – councils  
under £25,000 10am – 11.30am
- 21<sup>st</sup> VAT for unregistered councils (VAT126)  
10am – 11.30am
- 26<sup>th</sup> Year end & audit – councils over  
£25,000 10am – 11.30am

Last updated 18/04/2024

## April 2024

- 16<sup>th</sup> VAT for VAT registered councils  
10am – 11.30am
- 23<sup>rd</sup> VAT for unregistered councils (VAT126)  
10am – 11.30am
- 25<sup>th</sup> Finance for Councillors (eve)  
6.30pm – 8pm

## May 2024

- 2<sup>nd</sup> Procurement 10am – 11.30am
- 9<sup>th</sup> VAT for VAT registered councils  
10am – 11.30am
- 21<sup>st</sup> Finance for Councillors 10am -11.30am
- 30<sup>th</sup> VAT for unregistered councils (VAT126)  
10am – 11.30am
- 30<sup>th</sup> Short Briefing on Planning for Parish  
and Town Councillors 6pm – 8.30pm

## June 2024

- 11<sup>th</sup> VAT – partial exemption  
10am – 11.30am
- 13<sup>th</sup> Finance for Councillors  
10am – 11.30am
- 18<sup>th</sup> Finance for Councillors (eve)

6.30pm – 8pm

- 20<sup>th</sup> VAT for VAT registered councils  
10am – 11.30am

## July 2024

- 2<sup>nd</sup> VAT for unregistered councils  
10am – 11.30am
- 3<sup>rd</sup> Internal Controls 10am – 11.30am
- 23<sup>rd</sup> Understanding Neighbourhood Plans  
6pm - 8.30pm

## N.B. Further dates in 2024 tbc later

## ChALC Course Details

### Induction for Councillors and Clerks

This course is aimed at new councillors and clerks or those who want to refresh their knowledge or understanding. It covers: -

- Roles and responsibilities
- Statutory requirements of meetings
- Decision making and delegation
- Powers and duties
- Role of the Council in the planning system
- Budget and Precept procedures

## Roles and Responsibilities

Roles, duties and responsibilities:

- Clerk
- Chairman
- Councillors
- and the Council (as a body)
- The Council as an employer
- Handling Grievances and Disciplinary Matters

## Meetings and Procedures for Local Councils

- The purpose of agendas & minutes
- The importance of a detailed agenda
- Best practice in creating agendas & minutes
- How to create first class agendas & minutes
- How to handle confidential business
- Freedom of Information implications
- Retention of records & archiving

## Chairmanship for Local Councils

- The role of the Chair
- The preparation needed before a meeting
- Agenda preparation and management
- Rules of procedure
- Public participation & speakers
- Dealing with difficult people
- Code of Conduct

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## Other Provider Course Details

### Cheshire East Code of Conduct

This session will cover the introduction of the new Cheshire East Code of Conduct and the implications for Town and Parish Councils.

- Underpinning legislation
- Local Council obligations
- The Nolan Principles
- Registering and declaring interests
- 'Sensitive' information
- Interest – various forms
- Predetermination and Bias
- Dispensations
- Complaints

### Warrington Code of Conduct

The council adopted its current Code of Conduct at the meeting of 8 May 2021. The code sets out the standards required of councillors and is consistent with the following principles of selflessness, integrity, objectivity, accountability, openness, honesty and leadership. The code applies to all councillors and co-opted members.

- Underpinning legislation
- The Nolan Principles
- Standards of councillor conduct
- Registering and declaring interests
- Disclosable Pecuniary Interests (DPI)
- Complaints procedure
- Other interests

### Cheshire West and Chester Code of Conduct

The Code of Conduct changed on the 1<sup>st</sup> April 2022. This session will cover the revised Cheshire West and Chester Code of Conduct and the implications for Town and Parish Councils.

- Underpinning legislation
- Local Council obligations
- The Nolan Principles
- Registering and declaring interests
- 'Sensitive' information
- Disclosable Pecuniary Interests (DPI)
- Other interests
- Dispensations
- Complaints procedure

### Introduction to the Local Council Award Scheme (FREE)

During this session we aim to cover the following: -

- What is the Local Council Award Scheme?
- How does it work?
- Award Themes
- Award Levels
- Accreditation Process
- Benefits to the Councils
- Costs
- Available help and support
- Current holders of the Award in Cheshire

**David Kaiserman** is an experienced freelance planning consultant. His lengthy local government career included serving as Acting Director of Planning for the City of Manchester, this being followed by over 20 years delivering training for Planning Committee members and local authority staff in over 150 local authorities around the country. During most of this time, he was also a consultant planning inspector, being responsible for over 1500 appeal decisions in a wide range of urban and rural locations.

As well being an examiner of neighbourhood Plans (he has successfully completed 40 so far), David continues to provide planning training to elected members, with an emphasis on guidance to parish and town councils.

### A Short Briefing on Planning for Parish and Town Councillors

This session is aimed with a focus on helping town and parish councillors get the best out of the opportunities they have to respond to the local planning authority on individual planning applications.

Topics include: -

- The overall context for the planning system
- What needs planning permission and what doesn't?
- Making the decision: what's taken into account?

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- (a) the policy framework
- (b) other “material

considerations”

- Who gets to be involved?
- The choices for the planning authority – approve? refuse? defer?
- Types of permission and the use of conditions
- The appeals system

### Understanding Neighbourhood Plans – their status, scope and value and what’s involved in preparing them

This new course is not designed to give advice about how to prepare a neighbourhood plan – instead, it takes a step or two back by providing answers to the following questions:

- What could the value of a neighbourhood plan be to a local community?
- What matters can be included in the plan, and what can’t?
- What planning issues do most NPs typically cover?
- How are NPs intended to relate to your District’s Local Plan?
- What kind of evidence is required to support the case for policies in an NP?
- What stages do the plans have to go through before they are “made” (ie adopted)?
- How much local consultation is involved?
- What are likely to be the resource implications of embarking on a plan?

- What are the “basic conditions” that NPs have to satisfy?
- Are there any other legal requirements?
- How is the examination process conducted?
- Once made, what role do NPs play in the determination of planning applications?
- Are there any “golden rules”?
- Where can I find out more, and is support available?

### The Parkinson Partnership

specialises in work for the parish, town and community council sector in England and Wales. We deliver finance-related advice and training via Zoom through 36 county associations of local councils in England, answering around 500 queries and delivering over 2,000 online training places each year.

### Finance for Councillors

This session is for councillors only and is designed to give them a greater understanding of their duties with regard to the council’s finances.

Topics include:

- Roles and responsibilities
- Setting a budget and precept
- Financial control
- The Annual Governance and Accountability Return
- Internal and external audit
- How VAT applies to local councils

### Procurement

For anyone involved in procuring goods and services, preparing tenders or entering into contracts on behalf of local councils.

This session is an introduction to the basics of procurement for local councils – inviting quotes, producing specifications and tender documentation, achieving competition and value for money, managing contracts.

Topics include:

- Procurement thresholds
- Basic terminology and steps involved in procurement
- Estimates, quotes and tenders
- Specifications
- Quality and value for money
- Advertising, including Contracts Finder

### Internal Controls

This session gives councillors and clerks an understanding of the need for internal controls and how they work, with practical examples and case studies.

- Topics include:
- Roles and responsibilities
- Financial risks
- Purpose of internal controls
- Case studies
- Examples of controls
- Review of internal controls

## The Role of Internal Audit

For councillors and officers that want to understand the role of the internal auditor and how to appoint one. (Please note, this is NOT a training session for people who want to undertake internal audits)

This session explains the role of the internal auditor in providing assurance to the council that it has sound financial controls.

Topics include:

- Legislation and guidance
- Roles and responsibilities
- Risk management
- Internal controls
- How the council appoints an internal auditor
- Scope of internal audit
- Reviewing internal control
- Internal audit reports

## VAT for unregistered councils (VAT 126)

For clerks, finance staff and councillors from councils that are not VAT registered, but reclaim VAT on Form VAT126. This session explains how VAT affects local councils. Essential for any council contemplating major building projects.

Topics include:

- how VAT law applies to local councils
- where to find the law and guidance
- business and non-business activities
- understanding whether sales are taxable or exempt from VAT
- when a council must register for VAT

- when VAT can be reclaimed
- Partial exemption
- Reclaiming VAT when using grants and donations

## VAT for VAT registered councils

For clerks, finance staff and councillors from councils that are VAT registered, who wish to develop their knowledge (VAT registered councils have a 9-digit registration number, submit quarterly VAT returns online and charge VAT on taxable sales).

This session explains when and how VAT registered local councils charge VAT, when they can reclaim it and when they can't. Essential for any council contemplating major building projects.

Topics include:

- how VAT law applies to local councils
- where to find the law and guidance
- business and non-business activities
- understanding whether sales are taxable or exempt from VAT
- when to charge VAT
- VAT rates
- when VAT can be reclaimed
- VAT returns
- Partial exemption
- Non-business activities
- Reclaiming VAT when using grants and donations

## Year-end & Audit – receipts & payments accounts (over £25,000)

For officers who want to understand how to prepare their council's Annual Governance & Accountability Return on a receipts and payments basis and comply with the requirements of the audit process.

Session introduces the Annual Return and the stages of the audit process, enabling you to complete all the relevant steps correctly

Topics include: -

- Closing the accounts;
- Assets and borrowing;
- Internal audit;
- Reviewing internal control;
- The Annual Return;
- Electors rights;
- Publication requirements

## Year-end & transparency - councils under £25,000

For officers and councillors that want to understand how to comply with the requirements of the transparency code for and the Freedom of Information Act.

This session introduces the concepts of transparency and the publication of information, showing how it links to and overlaps audit requirements.

Topics include:

- Transparency for councils under £25,000
- Audit exemption for councils under £25,000
- Publication schemes
- The public's rights
- The Annual Return

## Income and expenditure accounting (for larger councils)

For officers who want to understand how to prepare their council's Annual Governance & Accountability Return on an income and expenditure basis (mandatory for councils regularly spending over £200,000) and comply with the requirements of the audit process.

This session explains how to convert receipts & payments to income & expenditure accounts, how this affects the Annual Return and the timing of year-end activities and the audit process, enabling you to complete all the relevant steps correctly.

Topics include:

- Closing the accounts
- Debtors and creditors
- Assets and borrowing
- Internal audit
- Reviewing internal control
- The Annual Return
- Electors rights
- Publication requirements

## VAT – Partial exemption

For clerks, finance staff and councillor of councils that lease or hire out land and buildings such as village halls, community centres, meeting rooms, sport facilities or markets, who need to understand when their council is at risk of not being able to reclaim VAT. Essential for any council contemplating major building projects, or incurring significant expenditure on running these facilities.

This session is for those who already understand the rules of VAT. N.B. It is unlikely to be of benefit for councils spending less than £50,000 a year or for anyone who doesn't understand the difference between business and non-business activities or between taxable and exempt supplies.

Topics include:

- Law and guidance
- Non-business, taxable and exempt uses of land
- Apportionment of costs
- Partial exemption calculations
- Occasional breaches
- Option to tax
- Capital Goods Scheme adjustments

## New Clerks Finance

This introductory session is FREE for inexperienced clerks in their first year and is designed to give them an overview of a council's year, along with a basic understanding of the RFO's role.

If you have 9 month's experience or more, this session is unlikely to cover anything you don't already know. Please leave this session for very new clerks and book yourself onto the more detailed sessions on Budgeting, Internal Control, The Role of internal audit, Procurement, Year-end and VAT instead.

Bookings by experience clerks may be removed without notice.

Topics include:

- Roles and responsibilities
- Setting a budget and precept
- Internal control
- The Annual Governance & Accountability Return
- Internal and external audit

## Internal Controls

For officers who want to understand how to prepare their council's Annual Governance & Accountability Return and comply with the requirements of the audit process.

This session does NOT cover exemption from audit or the Transparency Code for smaller Authorities. We have alternative sessions for councils under £25,000 that need those topics.

The session introduces the Annual Return and the stages of the audit process, enabling you to complete all the relevant steps correctly.

Topics include:

- Closing the accounts
- Assets and borrowing Internal audit
- Reviewing internal control

- The Annual Return
- Electors rights
- Publication requirements

## Breakthrough Communications: National Training Courses

We are partnered with Breakthrough Communications and a range of online courses, delivered via Zoom, are available which councillors, clerks and other council staff can **book directly with the provider**. ChALC will then invoice for sessions attended.

Overall training themes include:-

- Council Communications and Community Engagement
- Social Media and Digital Communications
- Council Interpersonal Skills
  
- Council Data Protection and FOI

For full information about individual courses, including dates and how to book, please click on this

link <https://breakthroughcomms.co.uk/calc-training-events/>. **N.B. Please ensure you complete all details via the online booking form and identify the correct county association, Cheshire Association of Local Councils (ChALC), from the drop-down menu.**

## Clare Lucas: UK Ducks-in-a-row

Clare has developed a strong passion for training and empowering others to leverage technology tools to enhance their daily work. Her commitment to fostering digital literacy and productivity serves as a testament to her dedication to helping others thrive in today's fast-paced and tech-driven world.

Online Parish Clerk Training Sessions available throughout the year on the following subjects: -

- **Canva**
- **MailChimp**
- **Trello**
- **Minute taking**
- **Time management and organisation**
- **Google suite**

Sessions are usually from 10am and last 1 hour. Cost £30 per delegate

All the information you need about each training session can be found on the website:

<https://www.ducks-in-a-row.uk/parish-clerk-training-sessions>

**N.B. Please book any sessions directly with the provider**