

ChALC Virtual Training Schedule 2023

Details of the course sessions planned for the year

For the calendar of dates and details of individual course 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 2023, and below that details including the session names, the topics to be covered, the cost 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 national training offers.

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

Trainer	Course Cost	Trainer	Course Cost	Trainer	Course Cost
ChALC	£25 member £40 non-member	Parkinson Partnership	£30 member £45 non-member	Jackie Weaver	£5 – member of public
Trainer	Course Cost	Trainer	Course Cost	Trainer	Course Cost
David Kaiserman	£30 member £45 non-member	Breakthrough Communications	£30 member £45 non-member	Andrea Pellegram	£30 member £45 non-member

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 or nikkihewitt@chalc.org.uk

Cancellation Policy - if you find yourself unable to attend any session please contact Nikkihewitt@chalc.org.uk or 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.

Last updated 15/08/2023

Schedule Calendar – ChALC

January 2023

- 19th CW&C Code of Conduct 6pm – 8pm
26th Chairmanship 10am – 12pm

February 2023

- 21st Introduction to becoming a councillor
6.30pm – 7.30pm

March 2023

- 7th Chairmanship 1.30pm – 3.30pm
14th Introduction to becoming a councillor
1pm – 2pm

April 2023

- 18th Meetings and Procedures 6pm - 8pm
27th Meetings and Procedures
1.30pm – 3.30pm

May 2023

- 23rd Induction for Councillors and Clerks
6pm – 8pm
30th Induction for Councillors and Clerks
6pm – 8pm

June 2023

- 8th Induction for Councillors and Clerks
1.30pm – 3.30pm
20th Warrington Code of Conduct
1.30pm – 3.30pm
27th Chairmanship 6pm – 8pm

July 2023

- 4th Chairmanship 1.30pm – 3.30pm
13th CW&C Code of Conduct 6pm – 8pm
19th Roles and Responsibilities 6pm – 8pm
27th Roles and Responsibilities
1.30pm – 3.30pm

August 2023

- 8th Introduction to the LCAS
1.30pm – 2.30pm
10th CW&C Code of Conduct
1.30pm – 3.30pm
15th CEC Code of Conduct
1.30pm – 3.30pm

September 2023

- 5th Meetings and Procedures 6pm – 8pm
14th Induction for Councillors and Clerks
1.30pm – 3.30pm
19th Meetings and Procedures
1.30pm – 3.30pm
28th Induction for Councillors and Clerks
6pm – 8pm

October 2023

- 10th Induction for Clerks and Councillors
6pm – 8pm
24th Chairmanship 1.30pm – 3.30pm
31st CW&C Code of Conduct 6pm – 8pm

November 2023

- 7th Warrington Code of Conduct
6pm – 8pm
16th Roles and Responsibilities 6pm – 8pm
21st CEC Code of Conduct 6pm – 8pm
30th Roles and Responsibilities
1.30pm – 3.30pm

December 2023

- 5th Chairmanship 6pm – 8pm

Schedule Calendar – other providers

September 2023

- 5th Finance for Councillors
10am – 11.30am
- 12th Procurement 10am – 11.30am
- 12th Finance for Councillors (evening)
6.30pm – 8.00pm
- 14th Budgeting for clerks and finance staff
10am – 11.30am
- 19th New Clerk's Finance 10am – 11.30am
- 26th Finance for Councillors
10am – 11.30am
- 27th Internal Controls 10am – 11.30am
- 28th VAT for unregistered councils (VAT 126) 10am – 11.30am

October 2023

- 3rd VAT for VAT registered councils
10am – 11.30am
- 3rd Short Briefing on Planning for Local Councillors 6.00pm – 8.30pm
- 5th Finance for Councillors
10am – 11.30am
- 10th Budgeting for clerks and finance staff
10am – 11.30am
- 10th Finance for Councillors (evening)

6.30pm – 8.00pm

- 12th Procurement
10am – 11.30am
- 17th Finance for Councillors
10am – 11.30am
- 19th Budgeting for clerks and finance staff
10am – 11.30am
- 19th Understanding Neighbourhood Plans
6.00m – 8.30pm
- 31st VAT for unregistered councils (VAT126)
10am – 11.30am

November 2023

- 2nd Finance for Councillors
10am – 11.30am
- 7th Finance for Councillors
10am – 11.30am
- 8th Internal Controls 10am – 11.30am
- 8th AP1: Introduction to Planning
6.00pm – 8.00pm
- 9th Budgeting for clerks and finance staff
10am – 1.30am
- 14th Budgeting for clerks and finance staff
10am – 11.30am
- 14th Finance for Councillors (evening)
6.30pm – 8.00pm
- 15th AP2: Role of local councillors in town planning 6.00pm – 8.00pm

- 16th New Clerk's Finance 10am – 11.30am
- 22nd AP3: Important Planning Concepts
6.00pm – 8.00pm
- 23rd Budgeting for clerks and finance staff
10am – 11.30am
- 28th Procurement 10am – 11.30am
- 30th Finance for Councillors
10am – 11.30am

December 2023

- 5th The Role of Internal Audit
10am – 11.30am
- 7th VAT for VAT Registered Councils
10am – 11.30am
- 12th VAT for unregistered councils (VAT126)
10am – 11.30am
- 13th Internal Controls 10am – 11.30am

January 2024

- 11th The Role of Internal Audit
10am – 11.30am
- 17th Internal Controls 10am – 11.30am

Last updated 15/08/2023

ChALC Course Details

Introduction to becoming a councillor.

Do you know someone who is thinking of standing as a councillor? Aimed at residents this introduction will provide information to help members of the public decide **N.B. not suitable if you are already a councillor – see induction (below) instead**

- Are you eligible to stand or could you be disqualified?
- The election process and requirements for 4th May 2023
- What does a town or parish councillor actually do?
- Skills to be a good councillor
- Rules and Regulations
- Functions of the council
- If this is for you - the next steps

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

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

Cheshire West and Chester Code of Conduct

The Code of Conduct changed on the 1st 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

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

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

Other Provider Course Details

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**.

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.**

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.

David Kaiserman: A short briefing on Planning for Councillors

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

David Kaiserman: 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?

Andrea Pellegram - who has two Masters degrees from Columbia University (Anthropology and Urban Planning) and a PhD in Social Anthropology from University College London - has prepared a specialist training programme for councillors and clerks. Her unique training focuses on the motivations and risks that we all face in planning and our training provides a unique perspective on how local councils should negotiate with different players in the planning game.

Andrea Pellegram: Session 1 – Introduction to Planning

- What is town planning and what does it cover?
- It's a plan-led system
- The policy hierarchy
- Who is involved and what do they want?
- Where do Parish and Town Councils fit in?
- Development Timetable

Andrea Pellegram: Session 2 - The Role of Local Councils in Town Planning

- Development Timetable
- Your role as a consultee
- Probity and transparency
- Running your planning committee
- Pre-application discussions with developers
- The difference between a Neighbourhood Plan and other Council plans

Andrea Pellegram: Session 3 - Important Planning Concepts

- Planning Conditions
- Planning Obligations
- Community Infrastructure Levy
- Viability
- Up to date housing land supply policies
- Permitted Development
- Biodiversity
- Material planning considerations

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

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

New clerk's finance

N.B. This introductory session is for inexperienced clerks in their first few months 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

Topics include:

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

By the end of the session you will:

- Be aware of relevant legislation and sources of guidance
- Be able to describe the key financial activities in a year
- Be aware of how the council's accounts must be prepared and audited
- Recognise the importance of internal controls

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

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 – Partial exemption

For clerks, finance staff and councillors of councils that lease or hire out land and buildings such as village halls, community centres, meeting rooms, sports facilities or markets, who need to understand when their council is at risk of not being able to reclaim VAT.

Session is for those who already understand the rules of VAT – and is unlikely to be of benefit for councils spending less than £50,000 a year or anyone that does not 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

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

Year-end & Audit – Income and Expenditure accounts

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.

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
- ▶ Debtors and creditors
- ▶ Assets and borrowing
- ▶ Internal audit
- ▶ Reviewing internal control
- ▶ The Annual Return
- ▶ Electors' rights
- ▶ Publication requirements