

Supporting Papers

Mudford Parish Council meeting

28th May 2026

Prepared by: Petra Galloway

Parish Clerk/RFO

26/65 To receive an update on matters arising from previous meetings and to review the action list:

- i. Judicial Review 14/02554/OUT (Clerk) - the Court has ruled against the Parish Council, dismissing the claims for judicial review. The Court has also ordered that the Parish Council, as claimant, pay the Defendant’s costs in the sum of £10,000 (inclusive of VAT), to be paid within 14 days. Permission to appeal the decision has been refused. An extraordinary meeting to discuss the next steps will be held on 20th May 2026.
- ii. Withy Bed land registration (Clerk, Cllr Bartlett) – ongoing.
- iii. Cattle issue - Ashington Lane (Cllr Bartlett)
- iv. Act to Adapt (Clerk) – a meeting is being arranged with Somerset Wildlife Trust and 3VFG to discuss the draft plan.

MUDFORD PARISH COUNCIL ACTION LIST

Item	Meeting Date	Action	Assigned To	Review Date	Outcome	Status	
57	22-Nov-24	Write MPC's Aims and Objectives	All councillors and Clerk	31-Mar-25	Pending	Open	To complete after Community Survey and Plan carried out
69	30-Jan-25	To keep an eye on low cost traffic measures - to be introduced in 2025-2026.	Clerk	Ongoing	Pending	Open	Only partially completed, 40pmh ha:
70	30-Jan-25	To continue communication with RoW re path diversion.	Clerk	Ongoing	Pending	Open	
73	27-Feb-25	Arrange for the work on rainwater pipe	Clerk	27-Mar-25	Pending	Open	Emailed in January 26 Work done, awaiting invoice
89	29-May-25	Withy Bed Conservation project - engage with YRCT	Clerk, Cllr Bartlett	Ongoing	Pending	Open	
94	29-May-25	Council logo - investigate trademark	Clerk	26-Jun-25	Pending	Open	
121	27-Nov-25	Facilitate meeting with 3VFG representative for Ashington with MOB complaining about flooding issues	Cllr Bartlett	15-Jan-26	Pending	Open	
134	26-Feb-26	Instruct solicitors re Withy Bed and search for maintenance proof	Clerk	06-Mar-26	Pending	Open	Solicitor Instructed - document search pending
141	26-Mar-26	East Lanes - street light on agenda (September)	Clerk	15-Sep-26	Pending	Open	
143	26-Mar-26	Ashington Lane - cattle issue- Cllr Bartlett will raise ongoing problem with the owner fo the land	Cllr Bartlett	30-Apr-26	Pending	Open	
144	30-Apr-26	Put Pavement issues (tope of the village) on Highways Maintenance scheme list	Clerk	18-May-26	Pending	Open	
145	30-Apr-26	Ask about SC about Withy Bed TPO.	Cllr Bartlett	28-May-26	Pending	Open	
147	30-Apr-26	Redwood Bank 1 year bond - share resolution with the Bank when required	Clerk	28-May-26	Pending	Open	

26/67 To consider planning applications, applications to discharge conditions, and any amendments to applications previously discussed; to agree any comments, and to make any necessary delegations to the clerk:

- i. 25/02769/REM; Land Os 3400, Mudford Road, Yeovil
Reserved Matters application for the appearance, landscaping, layout and scale for Phase 1 comprising 109 residential dwellings and associated infrastructure and green space, excluding the main site access relating to planning application 22/00695/OUT (appeal ref: APP/E3335/W/23/3328322)

Revised application – deadline for comments: 2nd June 2026

Letter from Bloor Homes' Consultant to the SC's planning department is attached separately.

Please find more information:

<https://www.somerset.gov.uk/planning-buildings-and-land/view-and-comment-on-a-planning-application/>

- ii. 26/00996/DOC1; Land Os 3400, Mudford Road, Yeovil
Discharge of Condition No. 9 (Constructed Treatment Wetland Details) (as amended by Approved Condition 25/01485/NMA) of Approved Application 22/00695/OUT, allowed on appeal APP/E3335/W/23/3328332.

Please find more information:

<https://www.somerset.gov.uk/planning-buildings-and-land/view-and-comment-on-a-planning-application/>



Your ref: APP/E3335/W/23/3328322 Mudford Road
Our ref: CP0095 Mudford Road, Yeovil

8 May 2026

R Moon
Somerset Planning – South Team
Brympton Way,
Yeovil,
BA20 2HT

Attention of: Rachael Moon

SENT VIA PLANNING PORTAL

Dear Rachael

**RE: RESERVED MATTERS APPLICATION FOR MUDFORD ROAD, YEOVIL
REF APP/E3335/W/23/3328322 – RESIDENTIAL DEVELOPMENT PHASE 1**

Having reviewed comments received in respect of Reserved Matter 25/02769/REM the applicant, Bloor Homes has provided a fully revised planning pack of information for determination, including the following:

- Plans (Design and Landscaping)
 - EXxxx-PD-801C (Colour Layout)
 - EXxxx-SL-001T (Site Layout 1-1000)
 - EXxxx-SL-001T (Site Layout)
 - EXxxx-SL-020D (Materials Layout)
 - EXxxx-SL-050B (Parking and EV Plan)
 - EXxxx-SL-060B (Means of Enclosure)
 - EXxxx-SL-070B (Refuse Plan)
 - EXxxx-SL-090B (Roof Plan)
 - EXxxx-SL-040B (Street Scenes)
 - EXxxx-SL-030B (Existing Site Layout)
 - Mudford Road Yeovil House Type Pack (revised)
 - EXxxx-LS-002c (Site Landscaping + Ph1)
 - EXxxx-LS-003d (Site Landscaping + Ph1)
 - EXxxx-LS-004d (Site Landscaping + Ph1)
 - EXxxx-LS-005c (Site Landscaping + Ph1)
 - EXxxx-Yeovil Mudford Road Visuals (RvA)

Copperfield
Suite 2
Leigh Court Business Centre
Abbots Leigh
Bristol
BS8 3RA
info@copperfieldltd.co.uk

Registered Office:
Blackbrook Gate 1
Blackbrook Business Park
Taunton
TA1 2PX
Registered in England and
Wales No. 13002386

- Engineering Drawings:
 - 1850 02 ATR 1001 C
 - 1850 02 ATR 1101 C
 - 1850 02 CNS 1001 D
 - 1850 02 PDL 1001 D
 - 1850 02 PDL 1002 D
 - 1850 02 PDL 1003 D
 - 1850 02 PDL 1101 D
 - 1850 02 PDL 1201 D
 - 1850 02 PDL 1301 D
 - 1850 02 PHL 1001 D
 - 1850 02 PHL 1002 D
 - 1850 02 PHL 1101 D
 - 1850 02 PHL 1102 D
 - 1850 02 PHL 1201 C
 - 1850 02 PHL 1202 C
 - 1850 02 PHL 1203 B
 - 1850 02 PHL 1204 C
 - 1850 02 PHL 1205 C

- Design Response Document P25-1881_GD03B
- 1850-SW-Ph1 Onsite Calculations (water)
- Mudford Road Summary of Archaeological Findings
- Mudford Road Biodiversity Net Gain Strategy Rev2- 29.04.26
- Mudford Road Biodiversity Net Gain Metric (in Excel) Rev2- 29.04.26
- Mudford Road Arboricultural Impact Assessment and Method Statement 30.04.26

To inform this process, the Bloor Homes team has engaged with Somerset Council via the Planning Performance Agreement and sought clarity on matters where necessary. They have also written to local Members to ascertain if they would like any further information or clarity as well as organising and attending a meeting with Mudford Parish Council and FOMAG to discuss the proposed changes.

In this context the applicant has fully engaged with relevant stakeholders when finalising the proposed revisions to this Phase 1 Reserved Matter submission. It is also relevant that the changes now presented are made within the confines set by the Outline Planning Permission and S106 Agreement. It is also important to note that some consultation responses raise matters that go beyond the scope of this Reserved Matters discharge of condition submission which only seeks approval for:

- Layout
- Scale
- Appearance
- Landscaping

The submissions also accord with the approved plans from the Outline Planning Permission stage of the process which include full access details and land-use parameters. The proposals within this Phase 1 Reserved Matter both accord with and do not seek to change either of these.

Response to Consultee Comments

Somerset Highways: No objection subject to conditions was received at the previous stage. As such, the proposed changes do not materially alter those aspects of the proposals that are relevant to Somerset Highways

NHS: The NHS confirmed that their position remains as per the contribution sought through signed S106 Agreement. The Reserved Matters to not change obligation.

Public Rights of Way: The PRoW Officer did not raise any objection therefore the revised submission does not seek to make any changes in this regard.

Monarchs Way: an objection to the principle of development was received from the Monarchs Way organisation. As explained later in this letter, the decision to grant Outline Planning Permission was made prior to Bloor Homes purchasing the site and the Reserved Matters have been made in accordance with the terms of that decision. No changes are therefore made in response.

Environmental Protection: The EHO confirmed that they had no comments to make in connection with the Reserved Matters. Details relating to construction management have been submitted separately in response to relevant planning conditions attached to the Outline Planning Permission.

Wessex Water: three observations were made by Wessex Water which are responded to as follows:

- The Phase 1 layout is confirmed to accord with the approved parameters set out during the outline planning application stage.
- The proposals are designed to discharge to Pen Mill treatment works.
- The Reserved Matters include a pumped connection to Fairmead Road. Bloor Homes explained the system to Mudford Parish and FOMAG during their last meeting.

As such, the Phase 1 Reserved Matter proposals comply with the expectations of Wessex Water.

South West Heritage Trust: The consultation response confirms Condition 12 of the Outline Planning Permission requires a Written Scheme of Investigation which has been submitted separately to the Reserved Matters. They also confirm no objection to the Reserved Matters and therefore no changes are proposed in this regard.

Affordable Housing Officer: The affordable housing officer has raised issue with the affordable housing mix proposed on site and is seeking a revision including adaptable dwellings. However, Bloor Homes is seeking to deliver what is set out in the signed S106 Agreement. It is not seeking to renegotiate this element. Likewise affordable housing mix is not one of the matters reserved by planning condition for subsequent determination.

The housing proportions for the affordable homes are prescribed by the s106 agreement. The homes are tenure blind in respect of material palette, and they are distributed in appropriately sized clusters, also as per the s106.. The layout plan also illustrates the wider site area (not for approval at this stage) to show that affordable housing is spread in small clusters throughout the site and not located in one corner. This is a reasonable response to support a mixed and balanced community at the same time as assisting the Registered Providers and their ongoing maintenance and management needs.

With regard to windows in side elevations, this is a reflection of the specific house types and locations. Where affordable dwellings are designed to respond to a corner position they include fenestration on three elevations. Examples would include plots 75-76, 77-78 and 82-83. Bloor Homes do not remove or reduce glazing based on tenure, the approach taken consistent between the private and affordable semi-detached homes (Byron/Lyttelton and Storer/Sorley).

Lead Local Flood Authority: The LLFA raised a series of technical drainage comments which are addressed through revised drawings. The accompanying Onsite Development Phase Surface Water Drainage Technical Summary also provides an explanation and response to the comments received. The main observations can be summarised as follows:

- The flooding in the 30 year has been removed, refer to the updated drainage calculations .
- The flooding in the 100 year has been removed, refer to the updated drainage calculations..
- The impermeable areas have been updated to suit the revised layout.
- Overall impermeable area used to determine discharge rates do not include urban creep.
- The 1 in 1 year event and 1 in 2 year event are restricted to the corresponding storm event with anything above the 1 in 2.3 year event then restricted to QBAR.
- The drawing of the attenuation features include details such as levels, volume, and water levels and corresponding calculations have been provided. Cross sections including details on formation, stability and materials will be provided as the detailed design output stage.
- Levels design has been amended to ensure overland flood flow is directed away from the existing properties.
- No groundwater has been recorded within surveys. Further review will be picked up at detailed design, with input from geotechnical/ structural engineer as required.
- A note has been added to drawing PDL-1002 which explains: as the post-development discharge up to 100 year + 45% C.C is restricted to pre-development QBar, this will significantly reduce flows discharging to the existing system.

Tree Officer: In response to comments received from the tree officer, options were explored to minimise the minor encroachment into the root protection area of T4, a summary and an the explanation for the approach ultimately taken is set out within the revised AIAMS. It is our view that unfortunately whilst there is encroachment of <5% into the RPA, the tree is unlikely to suffer as a result. A suitable mix of 'woody species' within hedgerows is proposed with a suitable mix of 7 species. A diversity of locally native species within green spaces is also proposed. With regard to a wider landscape management plan, this was not attached as a requirement to the Outline Planning Permission and is not a Reserved Matter for determination at this stage. However, The S106 Agreement address public open space management.

Phosphates Officer: The officer raises no issues in this respect and no further changes are proposed for this Phase 1 Reserved Matter submission.

Landscape and Placemaking Officer: A number of comments are made with respect to landscape matters and the following observations/ responses are provided:

- Details of the materials specification for the 1.8m screen wall can be addressed via a planning condition if necessary.
- Where possible and not in conflict with access drives, parking and services, additional street trees have been incorporated within the proposals, especially within the central main street. Most of the streets benefit from a view of the extensive public open space provided on site and establish a connection with Green Infrastructure.
- Trees are not proposed in rear private gardens as there is no ability to ensure they will be maintained by future occupiers.
- A wide variety of tree species is provided on site.
- Edge planting has been amended to provide hedgerows with interspersed tree cover, buffered by wildflower meadow and grass planting. No ecology or BNG issues re raised with respect of the level of planting and no amenity issues would arise from the distance between existing and new dwellings.
- A planning condition can be imposed to address the specification of private driveway materials.
- The materials plan confirms the removal of the bright red brick and introduction of a more subdued red as requested, a more detailed explanation of the design rationale is provided within the submitted Pegasus Design Response Document. Planting is proposed in front of the dwellings facing onto the northern public open space which in turn supports the delivery of a new community orchard.
- Consideration has been given to relocating play space following the QRP process, but there is insufficient room due to above and underground constraints. The QRP suggested substantial revisions to the housing parameters which would have facilitated such a change but were not supported by the Council. The applicant is therefore proposing to deliver Phase 1 in accordance with the Parameters set at the Outline stage.
- The Reedbed Wetland contains a permanent body of water under the reed system to promote biodiversity and the submitted metric demonstrates the substantial benefit it provides. The Wetland and basins also follow contours so they sit within the landscape and reduce the need for unnecessary engineering.

In summary the proposals address the comments, suggest suitable conditions where appropriate or explain why changes sought are not achievable or go beyond the context of the Outline Planning Permission.

Ecology Officer: The officer raises no issues in this respect and no further changes are proposed for this Phase 1 Reserved Matter submission, albeit a revised Metric assessment is provided to confirm the proposed amendments continue deliver the requisite biodiversity net gain.

WS Planning: The engineering information and tracking demonstrate that refuse vehicles can access the site as needed. Where relevant, access roads are designed to an adoptable standard (minimum width of 5m with adequate turning areas) and hence there is no objection from the highways consultee. Somerset's waste guidance states that collection vehicles can enter private areas provided they are to Somerset County Councils adoptable highway standards.

National Highways: No objection subject to conditions was received at the previous stage. As such, the proposed changes do not materially alter those aspects of the proposals that are relevant to National Highways.

Mudford Parish Council: The applicant has met with Members along with FOMAG and explained the proposed changes. Prior to this the Parish Council made 11 comments on the previous design iteration. These are comment on as follows:

- Appropriate screening consistent with the Parameter Plan is provided for properties on Mudford Road. There is a substantial distance between private residential properties to further support their amenity.
- The housing proportions for affordable houses are dictated by the dwelling mix set out in the S106 Agreement. All affordable dwellings meet the requirements of Registered Providers. The commentary regarding glazing is address in the response to the Affordable Housing Officer.
- All plans are to a measurable scale to enable the Parish Council to confirm any sizes or distances. Roads for example, are also compliant with the Somerset Highways requirements.
- Reference to a lost medieval village of Waindle is noted and the Archaeological Written Scheme of Investigation addresses the matter of potential on-site archaeology and sets separately to this Reserved Matter process. The WSI is too be approved by Somerset Council.
- The level of visitor parking spaces has been increased.
- Concerns about access to the site were a matter for the Outline Planning stage of this process and Bloor Homes is not seeking approval for the already approved access arrangement as part of this submission. It has however explained the process of delivery of the access and wider A259 works.
- With regard to amenity during construction, again this is a matter for a condition discharge rather than Reserved Matters. As such a Construction Management Plan will need to be approved by Somerset Council and implemented.
- Flood risk was discussed in detail with both Mudford Parish and members of FOMAG. Details of the sustainable drainage system were presented when we recently met with both organisations.

Yeovil Without Parish Council: The focus of comments relates to access and traffic capacity. As this is not a Reserved Matter for which approval is being sought this application does not propose changes in this regard. However, the approved access plans are to be implemented in accordance with the Outline Planning Permission, including works on the A359. Those works are however subject to technical highway approval which sits outside the planning process. Bloor Homes is engaged with Somerset Highways in this regard.

FOMAG: the members of FOMAG raise a number of matters that align with those raised by Mudford Parish Council and Members of the public. For brevity responses that are addressed either above in respect of Mudford Parish Council or below in respect of public comments are not repeated here. However, the following concluding comments are made:

- The proposals fully comply with the S106 agreement including the mix, type and tenure of affordable housing.
- Bloor Homes is not seeking a revised access to that which is approved. Its safety was considered at an earlier stage prior to Bloor Homes purchasing the site.

- The question of car dependence is also not a Reserved Matter for this stage of the planning process.
- The submitted information including the detail drainage strategy document demonstrate the proposals will manage flood risk and not increase it at a location where flood risk is not currently managed.
- Lighting will be kept to the minimum requirements set by Somerset Council.
- The proposals deliver 20% bio-diversity net gain which is double the national requirement.

In this context we have considered, engaged with and where appropriate to his Reserved Matter we have made amendments. Bloor Homes would be pleased to answer any further questions raised by either FOMAG or the Parish Council.

Natural England: No objections were raised by Natural England regarding the Phase 1 Reserved Matters. As such the proposed revisions make no changes in this regard.

Active Travel England: No comment is made by ATE except to refer to their standing advice. As such the proposed revisions make no changes in this regard.

Fire Service: No comment is made by Devon and Somerset Fire and Rescue except to refer to their standing advice. As such the proposed revisions make no changes in this regard.

Designing Out Crime: No objection is raised in connection with designing out crime and as such no changes are made in this regard.

Environment Agency: The Environment Agency confirmed the Reserved Matter did not fall within their criteria for further assessment and have therefore made no comment. As such no changes are made in this regard.

Response to Public Comments

26 members of the public have provided comments regarding the Reserved Matters. A number of respondents raise similar matters, and these are addressed collectively below.

- **Flood Risk:** Alongside these reserved matters are discharge of planning condition submissions which address surface water management associated with the development of this phase 1 scheme. Attenuation basins are provided on site in accordance with the approved Flood Risk Strategy and would result in a site that includes an element of betterment regarding surface water management when compared with the current undeveloped land.
- **Landscape Visual Impact:** this was a matter determined at the Outline Planning Application stage. The Reserved Matters are proposed in accordance with the approved Land Use Parameter Plan which fixes where dwellings are to be constructed and where landscaping is to be provided. The details of that landscaping is however subject of the current Reserved Matters approval process and provides for a substantially varied landscaping scheme.

- **Design Character:** The amount and scale of dwellings is in accordance with the scope of the Outline Planning Permission for this site. The detailed design of buildings and materials palette have been amended to better align with the use of materials locally. All buildings are two storeys. Whilst the site sits within Mudford Parish, the housing element directly adjoins Yeovil. The approved density of development is more reflective of edge of town and hence looking towards Yeovil for elements of character.
- **Loss of Semi-Rural Setting:** This is not a Reserved Matter and the decision to allow development at Mudford Road was approved at the outline planning stage of the process. Bloor Homes has however arranged dwellings to filter down to a 'feathered edge' at the northern end of the Phase 1 parcel.
- **Loss of Outlook and Residential Amenity:** The proposals reflect the green infrastructure off-set to existing dwellings put in place at the outline planning stage (as part of the approved Parameter Plan). The substantial off-set distances would not give rise to a residential amenity issue during occupation and during construction Planning conditions imposed at the Outline stage require a Construction Management Plan to be approved.
- **Impact on Wildlife and Biodiversity:** At the Outline Planning Permission stage the applicant voluntarily offered to deliver a 20% biodiversity net gain, which is double the statutory requirement. This will be delivered on site and Phase 1 exceeds this, demonstrating that biodiversity is being addressed from the outset.
- **Traffic congestion on the A359:** This is a matter that was determined at the Outline Planning stage of the process, including off-site highway works along Mudford Road. These works are approved in full and this Phase 1 reserved Matter does not seek to alter that approval.
- **Local Infrastructure Capacity:** The capacity of local infrastructure is not a matter for determination at the Reserved Matters stage. The S106 Agreement that accompanies the Outline Planning Permission specifies where local infrastructure will need support and this is delivered either through proportionate financial contributions toward their improvement through Somerset Council or through on-site delivery such as children's play space and affordable housing type, amount and tenure.
- **Engagement at the Outline Stage:** Bloor Homes was not the applicant at the outline planning stage and does not comment on engagement carried out by others. During the Reserved Matters stage, Bloor Homes has fully engagement, meeting Parish Councils on more than one occasion, meeting FOMAG, contacting Ward Councillors to provide information to support their own community consultation. Bloor Homes has fully engaged with Somerset Council including a full pre-application process and presentation to their Quality Review Panel. Details have also been provided via a Bloor Homes site-specific website.
- **Carbon Footprint:** The proposals address the requirements of the Outline Planning Permission and will be constructed in accordance with the latest Building Regulations, including Part L (conservation of fuel and power) which sets energy and performance standards for new dwellings. This includes a

fabric first approach to sustainable construction and energy performance as well as the inclusion of sustainable energy generation such as Solar Panels.

- **Affordable Housing Appearance:** The proposed affordable housing appearance is tenure blind, such that almost identical house types appear in both the market and affordable categories. Where there are minor variations, this is to address either Registered Provider requirements or the specific location of a dwelling within the scheme led by the character area rationale developed by Pegasus. The type and size of the affordable housing is fixed by the S106 Agreement and the proposals are made in accordance with this document.
- **Construction Management:** concerns are raised about construction management, contractor parking, HGV routing and working hours. This is addressed through the discharge of a planning condition rather than Reserved Matters. Bloor Homes is part of the Considerate Constructor scheme and has already engaged with Mudford Parish Council and is seeking to engage with The Key Sixth Form Centre.

In summary, Bloor Homes has reviewed all comments received via the Council's planning portal, discussed many with both Mudford Parish Council and FOMAG and where relevant to the Reserved Matters process, they have either been explained or addressed. It is concluded that the proposals are capable of being granted Reserved Matter approval as revised and we would be please to engage with any further dialogue with consultees should it arise.

I look forward to receiving confirmation that the above revisions to the application pack has been received by the Council and would welcome confirmation that the second consultation phase has commenced.

Your sincerely,

Colin

Colin Danks MRTPI

Director

on behalf of Copperfield L&P Ltd

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E



**26/69 FINANCE: To approve the Cashbook/Bank Reconciliation to 30th April 2026
(Appendix 1).**

MUDFORD PARISH COUNCIL 2026-27								
Receipts and Payments Summary for the year ending 31st March 2027								
	Last Year	This Year	Transfer from Reserves	Budget	Remaining including transfers from Reserves	Remaining based on initial budget	Remaining % based on initial budget	Variance
	2025-26	2026-27	during 26-27	2026-27	2026-27	2026-27	2026-27	between years
RECEIPTS								
Precept	£ 46,467.00	£ 27,541.00						-£ 18,926.00
Deposit Interest	£ 1,422.11	£ 30.76						-£ 1,391.35
Cemetery Fees	£ 7,800.00	£ 450.00						-£ 7,350.00
Grants	£ 5,500.00	£ -						-£ 5,500.00
CIL	£ -	£ 87.93						
Other	£ 5,150.00	£ 500.00						-£ 4,650.00
VAT repayment	£ 5,526.77	£ -						-£ 5,526.77
TOTAL RECEIPTS	£ 71,865.88	£ 28,609.69						-£ 43,256.19
PAYMENTS								
Operations								
Salaries	£ 10,252.17	£ 723.60		£ 11,500.00		£ 10,776.40	94%	-£ 9,528.57
Admin	£ 3,863.55	£ 797.00		£ 3,492.00		£ 2,695.00	77%	-£ 3,066.55
Subscriptions	£ 853.72	£ -		£ 960.00		£ 960.00	100%	-£ 853.72
Insurance	£ 1,391.32	£ -		£ 1,800.00		£ 1,800.00	100%	-£ 1,391.32
Training	£ 800.00	£ -		£ 520.00		£ 520.00	100%	-£ 800.00
Audits	£ 610.00	£ -		£ 700.00		£ 700.00	100%	-£ 610.00
Parish Maintenance								
Grounds Maintenance Contract	£ 4,956.44	£ -		£ 5,243.00		£ 5,243.00	100%	-£ 4,956.44
Hedges and Trees	£ 1,685.00	£ -		£ 3,500.00		£ 3,500.00	100%	-£ 1,685.00
Cemetery	£ 666.77	£ -	£ 300.00	£ 500.00		£ 500.00	100%	-£ 666.77
Play Area/Inspections	£ 913.82	£ -		£ 3,455.00		£ 3,455.00	100%	-£ 913.82
General Parish Maint/Drains/Flood	£ 5,497.40	£ -		£ 6,412.00		£ 6,412.00	100%	-£ 5,497.40
25-26 Projects and Grants								
Grants	£ 4,778.17	£ -		£ 7,000.00		£ 7,000.00	100%	-£ 4,778.17
Parish Projects	£ 70.00	£ -	£ 500.00	£ 8,000.00		£ 8,000.00	100%	-£ 70.00
Up Mudford Challenge	£ 16,205.63	£ 15,200.00	£ 24,794.37	£ 5,000.00	£ 14,594.37	-£ 10,200.00	N/A	-£ 1,005.63
Land North of Mudford Rd	£ -			£ 2,000.00				
VAT incurred	£ 5,774.04	£ 3,040.00						-£ 2,734.04
Budget additions (To Reserves)				£ 6,000.00				
TOTAL PAYMENTS	£ 58,318.03	£ 19,760.60						
s137 sub-total		£ -						
Exc of Recpt over Paymts	£ 13,547.85	£ 8,849.09						
plus balances b/fwd	£ 102,688.24	£ 116,236.09						
Balances c/fwd	£ 116,236.09	£ 125,085.18						
Reconciliation with bank accounts at 30th April 2026								
Unity Trust Current Account	£ 10,067.05							
Unity Trust Savings Account	£ 44,967.93							
Redwood Bank 95 day notice	£ 30,000.00							
Redwood Bank 1 yr Bond	£ 30,000.00							
Redwood Bank 35 day notice	£ 10,050.20							
Less Outstanding payments	£ -							
Add Outstanding lodgements	£ -							
Total balances at bank	£ 125,085.18							

28th May 2026

26/72 Finance FY 2025-2026:

- i. To approve the 2025-2026 year-end Cashbook/Bank Reconciliation.
- ii. To note the Budget Summary.
- iii. To review council's expenditure under s 137 of the Local Government Act 1972.

MUDFORD PARISH COUNCIL 2025-26								
Receipts and Payments Summary for the year ending 31st March 2026								
	Last Year	This Year	Transfer from Reserves	Budget	Remaining including transfers from Reserves	Remaining based on initial budget	Remaining % based on initial budget	Variance
	2024-25	2025-26	during 25-26	2025-26	2025-26	2025-26	2025-26	between years
RECEIPTS								
Precept	£ 58,100.00	£ 46,467.00						£ 11,633.00
Deposit Interest	£ 2,662.84	£ 1,422.11						£ 1,240.73
Cemetery Fees	£ 2,380.00	£ 7,800.00						£ 5,420.00
Grants	£ -	£ 5,500.00						£ 5,500.00
Other	£ 35.00	£ 5,150.00						£ 5,115.00
VAT repayment	£ 8,349.53	£ 5,526.77						£ 2,822.76
TOTAL RECEIPTS	£ 71,527.37	£ 71,865.88						£ 338.51
PAYMENTS								
Operations								
Salaries	£ 9,504.51	£ 10,252.17		£ 11,000.00		£ 747.83	7%	£ 747.66
Admin	£ 4,018.58	£ 3,863.55		£ 5,233.00		£ 1,369.45	26%	£ 155.03
Subscriptions	£ 663.08	£ 853.72		£ 724.00		£ 129.72	-18%	£ 190.64
Insurance	£ 921.28	£ 1,391.32		£ 1,000.00		£ 391.32	-39%	£ 470.04
Training	£ 380.00	£ 800.00		£ 1,345.00		£ 545.00	41%	£ 420.00
Audits	£ 557.63	£ 610.00		£ 650.00		£ 40.00	6%	£ 52.37
Parish Maintenance								
Grounds Maintenance Contract	£ 4,125.42	£ 4,956.44		£ 6,500.00		£ 1,543.56	24%	£ 831.02
Hedges and Trees	£ 2,676.27	£ 1,685.00		£ 4,210.00		£ 2,525.00	60%	£ 991.27
Cemetery	£ 5,963.18	£ 666.77		£ 2,080.00		£ 1,413.23	68%	£ 5,296.41
Play Area/Inspections	£ 941.64	£ 913.82		£ 935.00		£ 21.18	2%	£ 27.82
General Parish Maint/Drains/Flood	£ 1,503.00	£ 5,497.40	£ 2,117.00	£ 2,540.00	£ 840.40	£ 2,957.40	-116%	£ 3,994.40
25-26 Projects and Grants								
Grants	£ 1,885.00	£ 4,778.17		£ 5,300.00		£ 521.83	10%	£ 2,893.17
Parish Projects	£ 1,164.60	£ 70.00		£ 600.00		£ 530.00	88%	£ 1,094.60
Up Mudford Challenge	£ 26,398.50	£ 16,205.63	£ 20,000.00	£ -	£ 3,794.37	£ 16,205.63	N/A	£ 10,192.87
VAT incurred	£ 8,204.45	£ 5,774.04						£ 2,430.41
Budget additions (To Reserves)				£ 4,350.00				
TOTAL PAYMENTS	£ 68,907.14	£ 58,318.03						
s137 sub-total		£ 4,103.78						
Exc of Recpt over Paymts	£ 2,620.23	£ 13,547.85						
plus balances b/fwd	£ 100,068.01	£ 102,688.24						
Balances c/fwd	£ 102,688.24	£ 116,236.09						
Reconciliation with bank accounts at 31st March 2026								
Unity Trust Current Account	£ 21,248.72							
Unity Trust Savings Account	£ 24,967.93							
Redwood Bank 95 day notice	£ 30,000.00							
Redwood Bank 1 yr Bond	£ 30,000.00							
Redwood Bank 35 day notice	£ 10,019.44							
Less Outstanding payments	£ -							
Add Outstanding lodgements	£ -							
Total balances at bank	£ 116,236.09							

26/73 INTERNAL AUDIT: To receive the Annual Internal Audit Report and consider any recommendations.

**Report to Mudford Parish Council
Meeting date: 28th May 2026
Internal Audit
Prepared by: Petra Galloway (Clerk)**

Introduction

The internal audit was carried out by PATAS in April 2026. Some recommendations were made, including improving website accessibility. However, the clerk checked other councils' websites (including Somerset Council's website) using the same tool as the auditor, and all failed to meet the requirement. The clerk queried this with the auditor, and the auditor's response was:"

"Further to your email I have identified a less harsh compliance assessment: [Scan Results – CompliaScan](#)

Your site still needs work but this is a better score! I am going to change to this checker as the last one seems a bit harsh and may be looking to sell something, although it came directly from Wave, which most companies use as a basic review."

The clerk also raised this with the website provider and was advised that the photos appeared to be causing the issues. However, this has since been rectified, and the accessibility has not improved. The clerk will follow up.

Petra Galloway
Clerk to the Council
Mudford Parish Council

14th April 2026

Dear Petra,

INTERNAL AUDIT 2026

Parish & Town Auditing Services have been appointed to undertake the internal audits at Mudford Parish Council. The annual internal audit for 2025/26 financial year was completed on 14th April 2026.

I can confirm that I am independent of the Parish Council.

As stated in the Letter of Engagement letter, the scope of our work is limited to completing the audit testing and enquiries we deem necessary to complete the internal audit section of the Annual Report for Local Councils in England. We do not provide assurance over or accept responsibility for areas of work not included in this scope, unless specifically agreed with the Council during the financial year. In providing internal audit services we are not conducting a financial statement audit in accordance with standards and guidelines issued by the Smaller Authorities Proper Practices Panel and our procedures are not designed to provide assurance over the reliability and quality of your financial statements. This will be undertaken by the Council's appointed External Auditor.

We are required by the Annual Internal Audit Report included in the Annual Governance and Accountability Return (AGAR) to review controls in place at the Council against predefined control assertions. These controls are included in the following report.

The Audit has identified a number of recommendations to help update and improve the Council's current procedures. The audit has found no areas of concern and the Council's procedures and controls are generally working well.

Thank you for all the information you have provided to enable the audit to be undertaken.

Yours sincerely,



Paul Russell, Internal Auditor

INTERIM INTERNAL AUDIT

Outlined below is an overview of the 10 Assertions within the Practitioners Guide 2025. Each of these are dealt with under the relevant Governance sections contained in Section 1 of the AGAR:

AGS Assertion 1 — Financial management and preparation of accounts

- Accounting Records and supporting documents:
- Bank reconciliation:
- Budget setting:
- Investments:
- Reserves:
- General Reserves:
- Earmarked and other reserves:

AGS Assertion 2 — Internal control

- Standing Orders and Financial Regulations:
- Safe and efficient arrangements to safeguard public money:
- Employment:
- VAT
- Fixed assets and equipment:
- Loans and long-term liabilities:

AGS Assertion 3 — Compliance with laws, regulations and proper practices

- Acting with its powers:

AGS Assertion 4 — Exercise of public rights

AGS Assertion 5 — Risk management

AGS Assertion 6 — Internal audit

AGS Assertion 7 — Reports from auditors

AGS Assertion 8 — Significant events

AGS Assertion 9 — Trust funds (local councils only)

AGS Assertion 10 — Digital and data compliance

The following headings are based on Section 1 – Annual Governance Statement.

A. Appropriate accounting records have been properly kept throughout the financial year.

The Parish Clerk has been appointed as the RFO (LGA1972 s151). This is clearly stated on the website ([Staff – Mudford Parish Council](#))

The roll over figure is £102,688 (Box 7).

The Council maintains its accounts using a spreadsheet. A sample of the financial transactions between 1st April and 31st March 2026 has been undertaken. The following checks were carried out:

- A review of the cashbook against the bank statements and invoices paid;
- A sample of Payments have been checked against the bank statements to verify accuracy;
- Expenditure incurred is appropriate.

There is a proper process in place to ensure that financial information is correctly recorded and reported to Council as part of its governance procedures. Procedures are included in the Financial Regulations, the Scheme of Delegation Policy and the Internal Controls Policy. All three policies are available on the Council website.

A list of invoices for payment is presented to Full Council for payment as part of the agenda and is uploaded onto the website as part of the meeting papers. Approvals are minuted in the Council minutes and payment is via online banking. All payments are authorised by two Councillors.

The Council has a Risk Management Strategy in place ([25 365 Risk Management Policy March 26](#)) and a Risk Assessment ([Risk Management Scheme 2026-2027](#))

Bank reconciliations are prepared monthly, presented to Full Council as part of the agenda papers (also uploaded onto the website for transparency) and signed off by Council.

There is appropriate segregation in place and a robust process to enable the detection and identification of potential fraud.

The year end bank reconciliation has been completed. This was referenced back to the bank statements. The final balance held by the Council amounts to £116,236.09 as at 31st March 2026

The Council has met this control objective.

B. This authority complied with its financial regulations, payments were supported by invoices, all expenditure was approved and VAT was appropriately accounted for.

Tenders and Contracts are governed by Financial Regulations. All contracts being tendered should be published on the Parish Council's website as well as the Find a Tender portal where required.

The following quotations and tenders were undertaken in the 2025/26 financial year:

- Insurance
- Grounds maintenance
- Litter bin emptying
- Tree surgery
- Small repairs (Recreation Ground)
- Swings

Standing Orders were updated on 29th May 2025. Financial Regulations were updated on 29th May 2025. Currently the limits between the two documents match.

The invoices procedure is as follows:

- On receipt they are reviewed for accuracy;
- Coded to correct cost centre;
- Invoices are printed and filed. They are also compared against cashbook, payment schedule and bank statement by an appointed councillor;
- Payment schedule presented at each meeting for approval;
- Payments ratified at each meeting;
- Invoices are kept in secure storage.

There is appropriate segregation in place.

A VAT claim has been submitted twice during the year. The first VAT claim for £4,742.75 (April to November 2025) was received on 29/12/2025 and the second of £784.02 (December 2025 to February 2026) was received on 26/03/2026.

The Council has a Corporate Card in place. This is paid off monthly and reported to Full Council.

The Council does not have GPC in place at present. The Clerk is undertaking CiLCA.

The Council has met this control objective.

C. This authority assessed the significant risks to achieving its objectives and reviewed the adequacy of arrangements to manage these.

The Council has a Risk Management Strategy in place ([25 365 Risk Management Policy March 26](#)) and a Risk Assessment ([Risk Management Scheme 2026-2027](#))

An Asset Register is in place and is published on the website. The value of assets meets Box 9 of the AGAR: £81,263.27. additions are clearly stated.

The Council is insured through Zurich. Policy number YLL-2720877373. Cover runs from 1st June 2025 to 31st May 2026.

A review of the insurance policy has been undertaken and Council is adequately insured. It includes a fidelity guarantee of £500,000.

The Council is responsible for the Mudford Play Ground. It undertakes an annual independent inspection and carries out weekly checks which are recorded. One item was recorded as moderate risk in the annual inspection. All other equipment is has low or very low risk outcomes.

The Council has adequate internal controls in place to ensure that it carries out its day-to-day business effectively and efficiently. There is an internal controls policy in place ([Internal Controls Policy – Mudford Parish Council](#))

The Council has met this control objective.

D. The precept or rates requirement resulted from an adequate budgetary process; progress against the budget was regularly monitored; and reserves were appropriate.

At its meeting held on 30th January 2025 Full Council formally approved the budget and the setting of a precept. (Minute 24/218)

RESOLVED: Proposed by Cllr Bowring, seconded by Cllr Brown, the BUDGET of £46,467.00 for Financial Year 2025-2026 was unanimously APPROVED.

It has been confirmed that a precept of £46,467 was requested. (MHCLG Parish Code E3301P198)

Budget monitoring is undertaken at each Full Council meeting. The budget monitoring report is uploaded onto the website as part of the financial papers. The Council reviews its income and expenditure against the budget.

The Council has set up Earmarked Reserves and these are reviewed annually and minuted. The General Reserve at year end stood at £22,202.86 with Earmarked Reserves of £94,033.23 allocated to specific projects. Earmarked Reserves are clearly explained.

The Council has an adequate General Reserve to meet the current recommendations in place, with specific allocated EMRs also in place.

The Council had the following Bank Statement Balances as at 31st March 2026:

ACCOUNT	AMOUNT
Unity Trust Bank Current Account	£21,248.72
Unity Trust Bank Instant Access Savings Account	£24,967.93
Redwood Bank 95 days notice account	£30,000.00
Redwood Bank 1 Year Bond	£30,000.00
Redwood Bank 35 days notice account	£10,019.44
TOTAL	£116,236.09

The Council has met this control objective.

E. Expected income was fully received, based on correct prices, properly recorded and promptly banked; and VAT was appropriately accounted for.

The Council has no aged debtors.

Mudford Parish Council does not have any allotments.

The Council is a burial authority and is responsible for Mudford Cemetery. It has a specific page on its website for the Cemetery ([Mudford Cemetery – Mudford Parish Council](#)) which includes a copy of the current regulations and various forms relating to burials and memorials. A number of burials have taken place during the year and a Register of Burials is maintained.

The Council does not hire out any venues.

The Council does not have any leases in place.

Council's other income for 2025/26 included bank interest, grant funding, a donation and a refund.

The Council has met this control objective.

F. Cash payments were properly supported by receipts, all cash expenditure was approved and VAT appropriately accounted for.

The Council does not operate a petty cash system and did not receive any cash payments during the financial year.

The Council has met this control objective.

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.

The Clerk has a contract in place. A copy of this contract has been reviewed. It is based on the NALC template contract of employment.

Members do not receive a members' allowance.

A sample of staff salaries has been checked and confirmed. Salaries paid during the year have been reviewed. Gross pay is calculated in accordance with the relevant NJC scale.

Tax codes are included on the payslips and deductions properly calculated.

Payroll is undertaken by an external contractor.

Pay slips have been reviewed and it has been confirmed that tax is properly deducted.

No pension contributions have been made.

National Insurance contributions have been deducted when required.

A test sample was undertaken and it was confirmed that the correct net pay was paid to the employee with tax and NI contributions correctly deducted and paid to the respective agencies.

The Council has met this control objective.

H. Asset and investments registers were complete and accurate and properly maintained.

An Asset Register is in place and has been reviewed. Asset purchase cost is recorded and additional information is included where appropriate.

The current Asset Register includes both disposals and additions as well as insurance value of relevant items and replacement values.

A comparison of the insurance schedule against the asset register has been undertaken. Council has adequate insurance cover in place.

Council has no long-term investments in place.

Council has no loans in place.

The Council has met this control objective.

I. Periodic bank account reconciliations were properly carried out during the year.

Bank reconciliations are prepared monthly and are signed off by Full Council. Copies of the signed bank reconciliations have been provided and reviewed.

The Council has met this control objective.

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. Accounts are maintained on a receipts and payments basis.

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”).

Not covered.

The Council has met this control objective.

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.

The following information should be published on the Parish Council's website under the Smaller Authorities Transparency Code ([SI/SR Template](#))

Expenditure exceeding £100

Local authorities must publish details of each individual item of expenditure that exceeds £100. [Published as part of the agenda finance papers and at year end under Payments report.](#)

End of year accounts

Annual publication no later than 1 July in the year immediately following the accounting year to which it relates. [Published](#)

Annual governance statement

Annual publication no later than 1 July in the year immediately following the accounting year to which it relates. [Published](#)

Internal audit report

Annual publication no later than 1 July in the year immediately following the accounting year to which it relates. [Published](#)

List of councillor or member responsibilities

Annual publication of councillor or member responsibilities no later than 1 July in the year immediately following the accounting year to which it relates. [Published](#)

Location of public land and building assets

Annual publication no later than 1 July in the year immediately following the accounting year to which it relates. Parish councils and port health authorities to publish details of all public land and building assets – either in its full asset and liabilities register or as an edited version. [Published](#)

Minutes, agendas and papers of formal meetings

Publication of draft minutes from all formal meetings not later than one month after the meeting has taken place. Publication of meeting agendas and associated meeting papers not later than three clear days before the meeting to which they relate is taking place. [Published](#)

The Council has met this control objective.

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*).

The publication requirements were met. The Notice states 3rd June to 14th July 2025. This meets the statutory 30 day requirement.

The Council formally minuted the dates of the public notice at the meeting where the AGAR was approved on 29th May 2025.

The Council has met this control objective.

N. The authority has complied with the publication requirements for 2024/25 AGAR.

Publication Requirements Under the Accounts and Audit Regulations 2015, Authorities must publish the following information on the authority website/webpage: Before 1 July 2025 authorities must publish:

- Notice of the period for the exercise of public rights and a declaration that the accounting statements are as yet unaudited: [Published](#)
- Section 1 - Annual Governance Statement 2024/25, approved and signed, page 4: [Published](#)
- Section 2 - Accounting Statements 2024/25, approved and signed, page 5: [Published](#)

It is recommended as best practice, to avoid any potential confusion by local electors and interested parties, that you also publish the Annual Internal Audit Report. [Published](#).

The Council has met this control objective.

O. The authority has complied with laws, regulations & proper practices relating to digital and data compliance.

Council has a .gov.uk email addresses for its Clerk/RFO and its Councillors. Council meets best practice advice by having a .gov.uk domain for its website and email account.

The Council has adopted an IT policy as required. ([Information Technology \(IT\) Policy – Mudford Parish Council](#))

The Council has an Accessibility Statement published on its website. ([Accessibility Statement – Mudford Parish Council](#)).

Note that since September 2020, all parish and Parish councils must have a website that complies with Website Content Accessibility Guidelines (WCAG). As from October 2024 that rating level changed from WCAG2.1 AA to WCAG2.2AA so that it meets Accessibility Guidelines as set in the Public Sector Bodies Accessibility regulations.

It has been confirmed that Mudford Parish Council website does not comply with WCAG 2.2 AA. It only achieves 61% in the accessibility test and the minimum is 70% [Accessibility Test | See if Your Website is ADA-Compliant](#)

Accessibility has been reviewed and the parish council section of the website scores 9.5 out of 10.

Recommend that Council contacts its web provider to ensure it meets the accessibility requirement.

Data Protection requirements:

- Data Protection Officer – Parish Clerk
- Data Audit: Completed and provided
- Training for staff and Councillors: To be undertaken
- Data Protection Policy: In place [Data Protection Policy – Mudford Parish Council](#)
- Secure data to protect it from Data Breaches: [Data Breach Policy – Mudford Parish Council](#)

The Council has the following Data Protection Policies in place:

- Privacy Notices for various services
- Document Retention Policy
- Subject Access Request Policy

Council will need to ensure that the following requirements are met (Noted that this is currently being actioned):

- Organise GDPR training for staff and councillors;
- Ensure that both hard copy and electronic data have relevant protections in place. For hard copy records this will be identified by the audit. For electronic data it is recommended that your IT provider outlines what protections are in place, how often data is backed up and how it is stored. Ensure that all computers have some level of virus protection.

A Freedom of Information Policy is in place: [Freedom of Information Policy Adopted 25th July 2024](#) and

The Council meets the Smaller Councils Transparency Code as required.

The Council meets this control objective.

P. (For local councils only) Trust funds (including charitable) – The council met its responsibilities as a trustee.

The Council is not a sole trustee.

Annual Internal Audit Report 2025/26

Mudford Parish Council

<https://mudford-pc.gov.uk/> PUBLICLY AVAILABLE WEBSITE/WEBPAGE ADDRESS

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

14/04/2026

Paul Russell

Signature of person who carried out the internal audit



Date

14/04/2026

*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).

MUDFORD PARISH COUNCIL

Statement of internal controls and annual review of effectiveness of internal controls for year ending 31st March 2026.

The Accounts & Audit Regulations 2015 aims to strengthen governance and accountability through requirements related to internal control and internal audit. Whilst the Parish Council has reviewed the effectiveness of the internal audit (independence, competence, proportionate and scope), it has a requirement levied on it to ensure that its financial management is adequate and effective and that it has a sound system of internal control. The framework of accountability is risk-based i.e. level of control and management must be appropriate to the risk involved. The Council must determine the most appropriate method of internal control. It should ensure that internal control tests are proportionate and relevant and should not show undue interference in the RFO's day to day management of financial affairs.

Purpose of Internal Controls

Internal control is designed to reduce financial risk to the Council; the system of internal control is designed to ensure that the Council's activities are carried out properly and as intended. Internal controls are set up by the Clerk / RFO but it also falls to Council Members to ensure that they have a degree of control and understanding of those controls. Controls will include the checking of routine financial procedures; the examination of financial comparisons; the recording of assets and liabilities; the identification of risk and to evaluate the likelihood of those risks being realised and the impact should they be realised, and to manage them efficiently, effectively and economically.

Annual Review of Internal Controls

As part of its internal control, the Council agrees that overall it has conducted an annual review of the system of internal control via the following tests.

CONTROL TEST	COMMENTS
Ensuring an up-to-date Register of Assets	Reviewed in May 2025 and March 2026. Asset Register held in accordance with Proper Practices.
Maintenance arrangement for physical assets	Review carried out by the clerk in March 2026. All assets under insurance.
Annual review of risk & the adequacy of insurance cover	Carried out in March 2025 and 2025 (Risk Management Scheme) and April 2025 and April 2026 (Insurance) by Clerk/RFO and reported to full Council.
Awareness of Standing Orders & Financial Regulations	Reviewed and deemed to be fit for purpose and adhered to.
Adoption of Financial & Standing Orders	Both documents were reviewed in May 2025 and amended throughout the year as required.
Regular bank reconciliation, independently reviewed	Reviews carried out by RFO and verified by the Council monthly. Signed by two councillors at each ordinary meeting.
Regular scrutiny of financial records and proper arrangements for the approval of expenditure	Expenditure approved at each meeting. Council operates with 2 signatory authorisations. One appointed councillor verifies cashbook against invoices and bank statements.
Recording in the minutes or appendices the precise powers under which expenditure is being approved	Powers minuted with every new project. Day to day powers reported within the 2026-2027 budget. Annual reporting of all expenditure. Payments from previous month appendixes to the minutes.
Payments supported by invoices, authorised and minuted	Signatories verify prior to release of payments via the internet banking system.
Scrutiny of internet bank payments including authorisation procedures	Two councillors authorise all payments – invoices and check against invoices and payment schedule.
Payments made under section 137 of the 1972 LGA ("The Free Resource")	Reviewed at each annual parish council meeting. Separate accounting record kept.

Regular scrutiny of income records to ensure income correctly received, recorded and banked	Income (when received) reported.
Scrutiny to ensure precept recorded in the cashbook agrees to notification	Verified by two councillors.
CIL reporting to Somerset Council in accordance with legislation	The RFO will ensure that reports are submitted to Somerset Council in accordance with the prescribed timescales.
Contracts of employment for staff, annually reviewed Updating records to record changes in relevant legislation PAYE/NIC properly operated by Council as an employer	Yes – verification is carried out once payslips are submitted for payment at each relevant meeting. PAYE/NIC is calculated independently by an external company.
VAT correctly accounted for, payments identified, recorded and reclaimed in the cashbook	The VAT claims for 2025-2026 were received in full. All VAT invoices are addressed to the Parish Council. The RFO maintains VAT records to show the VAT that is reclaimable for each year.
Regular financial reports	Monthly - bank reconciliations (except when there is no meeting) and details of expenditure and income received.
Budget setting process in accordance with Proper Practices	Full Council considered the draft budget in October and November 2025 with final approval of budget in January 2026 once the tax base was known. Same process was carried out for budget 2025-2026.
Regular budget monitoring statements	Monthly budget to actual reports submitted.
Minutes properly numbered and paginated with a master copy kept for safekeeping	All minutes signed by Chair at each scheduled meeting in accordance with the LGA 1972. All pages are paginated.
Procedures in place for recording and monitoring Members' Interests and Gifts of Hospitality	At each and every meeting.
Adoption of Codes of Conduct for Members	Reviewed Code of Conduct (Model document by NALC) adopted by full Council.
Declaration of Acceptance of Office	Full Council when elected; Chair at each and every ACM.
Internal Controls Policy	In place and to be reviewed at least annually.
Internal Auditor	Appointed in May 2025 and to be appointed in May 2026, internal audit carried out and recommendations implemented as agreed by the council.
External Audit	PKF Littlejohn

Period covered by review of Internal Controls: 01.04.2025 - 31.03.2026.

Date of review of system of Internal Controls: 22nd April 2026 to be presented to the council on 28th May 2026.

Review of effectiveness of Internal Controls

The Council has responsibility for conducting an annual review of the effectiveness of the system of internal controls. The review is informed by the work and any issues identified by the Clerk to the Council / RFO who has responsibility for the development and maintenance of the internal control environment and managing risks and the Internal Auditor who reviews the Council's system of internal controls and who makes a written report to the Council. Regulation 6 of the Accounts and Audit Regulations 2015, imposes a duty on local councils to ensure "that the financial management of the body is adequate and effective and that the body has a sound system of internal control." Local councils are required, at least once a year, to conduct, in accordance with proper practices, a review of the effectiveness of its system of internal control.

The Council has reviewed the document at its meeting held on 28th May 2026.

26/78 To appoint an internal auditor for 2026-2027 and delegate the clerk to sign the letter of engagement.

**Report to Mudford Parish Council
Meeting date: 28th May 2026
Internal Auditor
Prepared by: Petra Galloway (Clerk)**

Introduction

This report sets out the considerations for the appointment of an internal auditor and provides the clerk's recommendations to assist the council in making a decision.

Clerk's recommendation

The clerk recommends that the council appoints Paul Russell (PATAS) to carry out the internal audit for FY 2026–2027, to be undertaken in April 2027 at a cost of **£295**.

Budget line

Audit (Internal Audit)

Legal Power

Account and Audit Regulations 2025 s5(1) and LGA 1972 s111

Research findings

PATAS has carried out internal audits twice, in April 2025 and April 2026, and the clerk/RFO has been satisfied with the level of detail provided. The auditor is independent of the council. The clerk sought recommendations from other councils prior to their appointment in 2025, and these were very positive.

26/79 To review the Asset Register and confirm the arrangement of insurance cover in respect of all insurable risks.

Background

The Asset Register was reviewed in March 2026, and the insurance cover (three-year LTA with Zurich Municipal) was reviewed in April 2026. The policy will renew on 1st June 2026, and the invoice has been paid on 5th May 2026. The insured value has been updated accordingly in the Asset Register – see the register below on page 2.

30th April 2026:

26/19 To review the current insurance cover under the three-year Long Term Agreement (LTA) with Zurich Municipal, and to consider and agree the renewal cost and the new policy schedule.

The council agreed a three-year Long-Term Agreement (LTA) with Zurich Municipal in April 2025 (Minute 25/19) at a cost of £1,391.31, with the policy term running from 1st June 2025 to 31st May 2026. The insurance is now due for renewal, with a renewal cost of £1,428.71.

RESOLVED: The council reviewed the current insurance cover and agreed the new policy schedule and renewal cost.

MUDFORD PARISH COUNCIL - Register of Fixed Assets - May 2026						
ITEM DETAILS	VALUE		POLICY	Addition/Removal in Financial Year *	Location, installation dates & any serial numbers	Checked by Clerk Mar-26
	Historical Cost (if known)	Replacement value (estimate)	Insurance value 26-27			
Cemetery Chapel	£ 18,614.81	£ 75,000.00	£ 78,750.00		Mudford Cemetery	Y
Computer and office equipment (inc. General equipment)	£ 651.87	£ 1,000.00	£ 1,050.00		HP 5CG8516PSO - laptop (£529 paid 03/2019), 2 Filing cabinets (VH) - 1st £72.87 paid 06/2019 2nd purchased £50 27/09/24	Y
PLAYGROUND EQUIPMENT						
Youth Shelter	£ 2,995.00	£ 6,500.00			Recreation Ground (Installed 2005)	Y
Play Area Outdoor Gym Equipment, Safety Surfacing and Fencing	£ 15,924.00	£ 20,000.00			Recreation Ground (Installed 12/2018, paid 03/2019) Gym equipment: 6 items	Y
Skate Park Equipment	£ 10,030.60	£ 45,000.00			Recreation Ground (5 items, Installed 2005)	Y
Children Play Area	£ Unknown	£ 35,000.00			Recreation Ground (Installed 2005)	
Picnic benches and memorial bench	£ 1,359.10	£ 2,000.00			Rec field (2 installed 2012 - £899.10) Memorial bench (£460 - paid 27/02/20) One bench in the playground (cost unknown)	Y
Total Playground Equipment	£ 30,308.70	£ 108,500.00	£ 113,925.00			
Sports equipment (goal post, basketball hoop)	£ 8,135.00	£ 8,135.00	£ 8,541.75		Recreation Ground (Installed 2005) Two basketball posts and a goal post.	Y
STREET FURNITURE						
Bollards	£ 376.25	£ 500.00			Recreation Ground 6 in total (£376.25 paid 29/08/2019)	
Seating benches (2)	£ 1,232.00	£ 1,500.00			Main Street	
Speed signs (2016)	£ 7,010.00	£ 7,000.00			Main street 1 at top and 1 at bottom of village	Y
Highway 'gates' (x4)	£ 3,404.36	£ 4,000.00			Main Street 2 at top of village, 2 at bottom of village	Y
Unknown Tommy figure (x 2)	£ 313.50	£ 400.00			Stored in VH (313.50 paid 29/10/2021)	Y
Bins	£ 519.78	£ 900.00			1 in Cemetery (£191.14 paid 31/08/22), 4 others: 2 in playing field and 2 on A359 - in front of Cemetery and Mudford Sock lay-by (cost in 2000 £328.64)	Y
Noticeboards (x3)	£ 3,017.00	£ 5,500.00			VH (£752 - paid 08/06/22) Hales Meadow (£2,265 paid 03/10/23) Primrose Lane cost unknown	Y
Fingerposts (5)	£ Unknown	£ 1,500.00			All around village	Y
Bus Shelter	£ 3,845.00	£ 4,500.00			Main Street (£3,845 paid 30/01/2024)	Y
Telephone box	£ 376.49	£ 3,200.00			Box likely donated - Refurbishment parts (windows, signs) paid £376.49 26/05/2021, Main street	
Signs	£ 649.40	£ 1,100.00		Added in 2025-2026	6 in total: 1 on the cemetery fence (1 stored in the VH), 2 on the play area fence, 2 on the post at the skatepark paid on 07/08/2025 and 01/09/2025 total of £649.40	Y
Total Street Furniture	£ 20,743.78	£ 30,100.00	£ 31,550.00			
GATES & FENCES						
Withy Bed Gate	£ 406.60	£ 700.00	£ 735.00		Withy Bed (£406.60 paid 20/06/24)	Y
DEFIBRILLATORS						
Defibrillator, cabinet (x2) & airtag (x1).	£ 2,400.51	£ 5,000.00	£ 5,250.00		VH (£1,650.51 - paid 13/03/23) Milton House (£750 - paid 27/12/23)	Y
Land - Basis of Valuation: Nominal Valuation						
Cemetery	£ 1.00				Top of village	
The Withy Bed	£ 1.00				Bottom of village	
Village Hall	nil	nil	nil		PC is Custodian Trustee, VH is run by registered charity no 292596	
TOTAL	£ 81,263.27					
Items' values added without VAT						
Insurer - Zurich Municipal						
* This column was created in 2025-2026						

26/80 Bin collection of parish council's owned bins:

- i. To note that 3 quotes were requested for the weekly collection of parish council's street bins
- ii. To receive Somerset Council's quote.
- iii. To agree actions to be taken, including the acceptance of the quote.

Report to Mudford Parish Council
Meeting date: 28th May 2026
Bin collections
Prepared by: Petra Galloway (Clerk)

Introduction

This report presents the research findings and cost implications for the collection of the Parish Council's owned bins and provides the Clerk's recommendations to support the Council in reaching a decision.

Clerk's recommendation

The Clerk recommends accepting Somerset Council's quote (same as last year) - £2,366 + VAT for the weekly collection of seven bins.

Legal power

Litter Act 1983, s5 and s6

Budget Line

General Parish Maintenance

Research findings

Background

Last year, Somerset Council (SC) announced that it would no longer cover the cost of emptying street bins that are owned or provided by Parish Councils. A quote was received and accepted in April 2025.

The Clerk contacted Better Waste and Biffa in February 2026; however, neither company collects street bins. The Clerk also contacted Yeovil Without Parish Council, but they own only one bin, which is emptied by their ground's person.

The Clerk requested a quote from SC in February and was advised that it would be provided in March, with costs likely to remain the same as in 2025–2026. SC provided the quote in May 2026.

Details of the quote

Mudford Parish Council

We are pleased to submit the following quotation for your consideration.

Description	VAT	Amount
Litter bin x 5@ £6.50 emptied once a week Location: A359 Village Car Park f/path to field 90 metres in field on the left, Hales Meadow entrance to field on the left, A359 Mudford Rd on left in layby after Sock Hill, A359 Mudford Rd in front of Cemetery, Mudford Rd in Cemetery Dog bin x 2@ £6.50 emptied once a week Location: A359 Village Car Park f/path to field 30 metres in field on the left, Hales Meadow entrance to field on the left	20%	£2,366.00

Subtotal	£2,366.00
Taxable	£2,366.00
VAT @ 20%	£473.20
Other	£0.00
TOTAL Due	<hr/> £2,839.20

The above quotation is subject to the attached terms and conditions of business. Please ensure that you read the terms and conditions fully and that you agree to them before you accept this quotation.

I trust that we have interpreted your requirements accurately. Should you wish to accept this quotation on the terms and conditions set out, please detach, complete fully and return the acceptance slip to the address at the bottom of this letter or via e-mail. Please contact me should you require any further review. This quotation will remain fixed for a period of 30 days following which costs detailed may be subject to review.

26/81 To note that the accountant's quote for payroll services, as agreed in motion 25/358 (26th March 2026), omitted the annual charge of £80 + VAT for completion of the end-of-year process. To consider accepting the amended quote.

Background

The council agreed to use Pinnacle Accountancy Services for employee payroll (please see the resolution below). However, the clerk has since identified that the accountant omitted the end-of-year process from the original quote, which increases the annual fee to £260 (£15 × 12 + £80, plus VAT). The accountant was very apologetic for the omission and has provided an updated quote for the council's consideration. This fee remains lower than the other two quotes presented in March 2026.

Clerk's recommendation

The clerk recommends accepting the amended quote of £260 + VAT for FY 2026–2027 (to be debited to admin budget – payroll services - £300 available).

In March 2026 the council agreed

25/358 Payroll services:

- i. To note that 3 quotes were requested for the provision of payroll services of the council employee(s).
- ii. To receive 3 quotes.
- iii. To agree actions to be taken.

RESOLVED: The council noted and received the 3 quotes and agreed to accept quote 3 for £15 + VAT per month from Pinnacle Accountancy Services Ltd. The council agreed the wording of the contract agreement and for the clerk to sign it. The cost will be debited to the Admin budget.

Legal power: Local Government Act 1972, section 111

ACTION: Clerk

Amended quote:

I am writing to provide you with an amended quote for our services for the forthcoming payroll year.

To provide:

- Monthly payroll processing
- Production of payslips
- PAYE calculation and completion of records
- Year-end payroll activities (P60, P45 where required)
- Pension contributions processing (if applicable)
- Compliance with HMRC statutory requirements

Our fee, for up to two employees, will be £15.00 per month plus VAT (invoiced quarterly), plus an annual charge of £80 (plus VAT) to complete the year end process.

If we provide additional services or the number of employees increases, we will provide an estimate of our additional fees upon request.

I trust the quote will meet with the Council's approval.

Governance and Resources Committee's Recommendations to Mudford Parish Council

28th May 2026

Recommendations – Policies and GDPR Training

The committee reports that it met on Thursday 14th May 2026 and reviewed core governance policies, data protection arrangements, and newly drafted policies.

The committee recommends that the council:

- Adopts the reviewed policies and documents which include the core policies and data protection policies (as included on today's agenda).
- Reviews the Internal Controls Policy in June or July, once the Scribe Accounting Software is fully in use, so this can be reflected in the policy.
- Approves the replacement of the existing Data Protection Policy and Privacy Notice with one consolidated Data Protection Policy.
- Adopts a new Disciplinary Procedure.
- Adopts a new Expenses Policy and Expenses Claim Form.
- Ensures that all Councillors undertake GDPR training in order to comply with Assertion 10, with the exception of Cllr Brown, who has already completed the training.

The committee recommends the following changes:

26/82 Core policies:

- i. Standing Orders – changes: p.6 (time), p. 10 – delete review of HR policies –, p.12 (clerk included), p.15 couple of paragraphs deleted (omitted in the last change but it was already deleted in the latest NALC model SO), p.19-20 changes from Council to Committee.
- ii. Financial Regulations – no changes are required at this stage.
- iii. Code of Conduct – no changes are required at this stage.
- iv. Scheme of Delegation – very minor changes in red.
- v. Complaints Policy – no changes are required at this stage.
- vi. Communications Policy – minor changes in red.
- vii. Health and Safety Policy – no changes are required at this stage.
- viii. Publication Scheme - minor changes in red.

26/87 HR policies:

- ii. Grievance Policy – non functioning links removed.
- vi. Sickness absence policy – Statutory Sick Pay (page 2) changed to comply with the new legislation – SPP is now payable from 1st day of sickness.

26/86 Data Protection policies:

- i. Accessibility Statement – no changes are required at this stage.
- ii. Cemetery Privacy Notice - just one sentence added at the end.
- iii. Data Breach Policy – no changes are required at this stage.
- iv. Data Protection Policy – new policy. The old one was a NALC template but only related to council employees and not the public. Hence, the privacy notices etc. also needed to be adopted. It was changed to include the public, contractors, etc. Information about the Data Breach and SAR policies is included in the policy.
- v. Freedom of Information Policy – The old policy basically spoke about publication scheme (which is a separate document) and acted like this policy is the publication scheme. Some minor changes in red to make it clear they work together but are not the same document.
- vi. Privacy Policy for Website Users – just one sentence added at the beginning.

26/88 Disciplinary Procedure and Expenses Policy (including expenses claim form)

- Disciplinary Procedure: A new document that the PC did not have. Based on ACAS advice.
- The old expenses policy was insufficient – this is a new policy (NALC model) and new form drafted by the clerk.

26/89 Document Retention and Disposal

The old document was insufficient. This is a new document (SLCC's model document) – please note: it comes in two parts.

**MUDFORD PARISH COUNCIL
GOVERNANCE AND RESOURCES COMMITTEE
TERMS OF REFERENCE**

These Terms of Reference were adopted by the council at its meeting held on 28th May 2026.

Constitution and purpose

The Governance and Resources Committee is constituted as a Standing Committee of Mudford Parish Council and authorised by the council to manage any activity within its Terms of Reference.

The Governance and Resources Committee shall have responsibility for oversight of the council's governance framework, resources, staffing and policy compliance.

The committee shall operate within the legal framework set by statute, national guidance and council policy, and support the operational independence of the Parish Clerk.

Membership and quorum

1. The committee shall comprise of four members, including at least three councillors, one of whom shall be appointed as the chair of the committee by the full council.
2. A quorum shall consist of three committee members, all of whom must be councillors.
3. Non-councillors may be appointed as members of the committee but shall not have voting rights.
4. Members shall be appointed at the Annual Parish Council Meeting.
5. All members must observe Code of Conduct.

Meetings

1. The committee will meet as necessary and at least twice a year. The Standing Orders apply to all meetings.
2. All meetings will have an agenda and minutes will be taken and be presented for approval at the next committee meeting.
3. All meetings should be open to the public, although the public and press may be excluded when sensitive matters are under discussion.
4. The Parish Clerk should attend and prepare agenda and minutes for meetings.

Scope of Governance

1. To promote understanding and observance of the council's Code of Conduct, with a view to ensuring that all interactions between members of the council, officers, employees, volunteers, contractors, members of the public and any other people with whom contact is made are conducted with respect and courtesy.
2. To ensure that the council has policies and procedures in place to meet its human resources and health and safety and all other statutory responsibilities.
3. To conduct an annual review of the council's Code of Conduct, human resources, health and safety, finance, cemetery and other policies and procedures and recommend amendments and additions to the full council in advance of the Annual Parish Council Meeting.
4. To oversee corporate governance arrangements, including internal controls, risk management and audit responses.
5. To respond to consultative document from Government and other bodies.
6. To ensure that health and safety, data protection legislation and best practice are adhered to across the council's function.

Scope of Resources

1. To provide strategic oversight of the council's staffing structure, training programmes and human resource needs.
2. To support the Parish Clerk in ensuring the effective recruitment, retention, and development of staff to meet the council's objectives.
3. To receive reports and recommendations from the Parish Clerk on staffing matters, including regrading, pay levels and structural changes. Recruitment to all roles below the Parish Clerk, where no changes to the job description are proposed, will be undertaken by the Parish Clerk with members of the committee sitting on the interview panel.
4. To decide, with the Parish Clerk and any other staff concerned, any issues relating to staffing levels and re-grading, pay levels and staffing structures.
5. To monitor Parish Clerk's and councillor training programmes and their respective budgets.
6. To manage the recruitment of Parish Clerk and/or RFO, including the preparation of job descriptions, person specifications, job evaluations, remuneration levels and employee contracts, shortlisting and organising interviews, and making recommendations to the full council.
7. To conduct the Parish Clerk annual appraisal, set performance objectives, and support professional development.
8. To manage Parish Clerk's sickness absence and leave requests.
9. To oversee the dismissal process of Parish Clerk.

10. To make recommendations to the council concerning any changes to the salary, hours of work and pension arrangements of Parish Clerk.
11. To appraise the performance of the Parish Clerk. The appraisal of any additional Parish Council employees will be carried out by the Parish Clerk.
12. To comply with and have due regard to existing policies relating to staffing matters which include (but are not limited to): i. Standing Orders ii. Financial Regulations. iii. Job Descriptions and National Joint Council (NJC) contracts. iv. ACAS guidelines and procedures for grievances or disciplinary matters v. Implementing NJC changes as notified by SALC.
13. To act as point of contact for formal complaints made by or against the Parish Clerk. To follow up complaints relating to staff and undertake disciplinary and grievance procedures, as necessary, and report back to the full council.
14. The Governance and Resources Committee may appoint a sub-committee with its own Terms of Reference and membership, as agreed by the committee. The committee may delegate authority to the sub-committee to deal with specified matters. Meetings of the sub-committee will not be open to the public.

Reporting

The Chair of the Committee shall report back to the full council with recommendations.

Review

Annually at the Annual Meeting of the Parish Council.

26/83 Community Plan Steering Group:

- i. To receive the minutes of the last meeting of the Community Plan Steering Group.
- ii. To receive the report of the chairman of the group and consider group's recommendations.
- iii. To review and agree the Terms of Reference including delegation of arrangements for the Community Plan Steering Group and its meeting dates.
- iv. To appoint members of the group.

The last meeting of the committee was scheduled for 18th May 2026; however, only the chair of the committee and the clerk attended, and the meeting was therefore adjourned. The previous meeting was held in April, and the council received the draft minutes and the committee's recommendations from that meeting at its meeting held on 30th April 2026 (motion 26/28).

The chair of the committee, the chair of the council, a village hall committee member, and the clerk discussed the draft community survey with the survey provider, and the final wording will be agreed by the clerk, as delegated by the council on 30th April 2026.

The committee will oversee the distribution of the survey and support parishioners in completing it as required. The clerk will prepare the necessary risk assessments. Survey support sessions for parishioners will likely be held in the last week of June in the village hall and potentially at Milton House (subject to confirmation).

Mudford Parish Council

Community Plan Steering Group – Terms of Reference

1. Purpose

The Steering Group is established by Mudford Parish Council to support the development and delivery of the Community Survey and Plan. Its primary role is to gather information, engage with the community, and prepare materials for consideration by the Parish Council. The group does not have decision-making powers (it is an advisory committee); all recommendations and findings will be presented to the Parish Council for discussion and approval.

2. Objectives

- To design and plan a community survey that reflects local priorities and concerns.
- To collect and collate relevant data and feedback from residents.
- To liaise with local groups and stakeholders to ensure broad representation.
- To report findings and recommendations to Mudford Parish Council.

3. Membership

The Steering Group shall consist of:

- Cllrs Bartlett and Edgeworth
- Chair of the Three Villages Flood Group (3VFG)
- Chair of the Village Hall Committee
- Speed Watch Representative
- St Mary's Church rector
- L. Weir

Additional members may be co-opted with the approval of the Parish Council if specific expertise or representation is required.

All members have voting rights. The quorum is 3 members.

4. Governance

- The group shall appoint a Chair from among its members to facilitate meetings.
- The Parish Clerk will provide administrative support and ensure records are kept.
- Meetings will be held as required and agreed by the group.
- Minutes of meetings will be shared with the Parish Council and made available to the public where appropriate.

5. Reporting and Accountability

- The Steering Group will report directly to Mudford Parish Council.
- All outputs, including survey drafts, data summaries, and recommendations, must be submitted to the Parish Council for approval.
- The group shall operate transparently and in accordance with Parish Council policies and procedures.

6. Duration

The Steering Group will remain in place until the completion of the community survey and presentation of final findings to the Parish Council, unless extended or dissolved by the Council.

These Terms of Reference were agreed by Mudford Parish Council on 28th May 2026.

Mudford Parish Council

Disciplinary Procedure

This procedure is based on Acas's Discipline and Grievance Guidance.

Step 1: A disciplinary procedure is a formal way for the council to deal with an employee's:

- 'misconduct' – this is unacceptable or inappropriate behaviour
- 'capability' – this is the ability to perform the job properly

Before starting a disciplinary procedure, Mudford Parish Council's Governance and Resources Committee should first see whether the problem can be resolved in an informal way. This can often be the quickest and easiest solution.

The Governance and Resources Committee ('the committee') should try solving the issue with the employee by:

- privately talking with them and any other staff involved
- listening to their point of view
- agreeing improvements to be made
- setting up a training or development plan, if it is a performance issue

Dealing with capability issues

Capability or performance is about an employee's ability to do the job. There are things the committee should do to help an employee improve if there are problems with their performance at work. These might include:

- mentoring or coaching
- training

The committee should try these things first before starting a formal disciplinary procedure.

What counts as misconduct

Misconduct is when an employee's inappropriate behaviour or action breaks the council's rules.

Some misconduct examples include:

- bullying
- harassment
- 'insubordination' – for example, refusing to do work
- being absent without permission – also called 'absent without leave' or 'AWOL'

If misconduct happens outside work

An employee could face disciplinary action for misconduct outside work.

For example, where an employee's behaviour in front of a parishioner reflects badly on the council.

It depends on how serious the misconduct is and whether it could affect council business. It is important the committee carries out a thorough investigation and can show the effect on the council.

When there is gross misconduct

Some acts count as 'gross misconduct' because they are very serious or have very serious effects.

If the committee finds there has been gross misconduct, it must still carry out an investigation and a fair disciplinary procedure. It might then decide on dismissal without notice or payment in lieu of notice.

Examples of gross misconduct at work could include:

- fraud
- physical violence
- 'gross negligence' – this means a serious lack of care to duties or other people
- serious insubordination – for example, refusing to follow policies or take reasonable orders from a supervisor

Step 2: Following a fair procedure

If the committee feels it needs to start a disciplinary procedure, it is important to tell the employee straight away.

This should be in writing, for example in a letter or an email. This should include:

- information about the alleged misconduct or poor performance
- possible consequences, for example a written warning

The employee should have this information in time to prepare for a disciplinary hearing. This is a meeting where the committee considers all the evidence before making a decision.

The committee must make sure it follows a full and fair procedure throughout.

This is for the protection of the employee, the committee and the council itself.

The importance of following a fair procedure

The Acas Code of Practice on disciplinary and grievance procedures is the minimum the committee will follow.

Carrying out an investigation

To follow a fair procedure, the committee must carry out an investigation. This is to get as much information as the committee reasonably can about the employee's alleged misconduct or poor performance.

Although the Acas Code is not the law, if a disciplinary case reaches an employment tribunal, judges will take into consideration whether the committee has followed the Acas Code in a fair way.

The Acas Code mainly applies to those legally classed as an employee. But to keep good working relationships, the committee should follow the same fair procedure for all workers.

Training for councils and managers

To learn more about the Acas Code and how to follow a formal procedure, the committee can book Acas training on discipline and grievance.

If anything similar has happened before

The committee should check whether it has dealt with a similar situation before.

To ensure fair treatment, the committee must follow the procedure and policy in the same way for each disciplinary case.

It should gather evidence and make a decision based on what it knows about each case.

Keep talking

It is important throughout the procedure for the committee to keep talking with both the employee being disciplined and any other staff affected.

Clear, regular and confidential communication can help avoid misunderstandings, a drop in work morale, stress or other mental health problems, further action such as the employee raising a grievance, or legal action in the future.

The committee must keep all personal information confidential in line with data protection law.

Looking after employees' wellbeing and mental health

Going through a disciplinary procedure can be very stressful. It is important that the committee considers the wellbeing and mental health of its employees.

Looking after wellbeing and offering support can help prevent absence, mental health problems, or existing mental health problems getting worse.

For example, as well as regular communication, the committee could arrange meetings in a more private and comfortable location if this would help the employee.

If the employee raises a grievance

If the employee raises a grievance during the disciplinary procedure, the committee can pause the disciplinary and deal with the grievance first.

It might be appropriate to deal with both at the same time if the grievance and disciplinary cases are related.

If the employee wants to resign

The employee might want to resign or feel they have to leave when facing a disciplinary.

This could lead to the employee later claiming constructive dismissal at an employment tribunal. They can only do this if they have worked for the council for two years or more.

The committee should try and talk through any concerns with the employee. It should give them the chance to change their decision to resign.

Step 3 Carrying out a fair procedure

To follow a fair procedure, the committee must carry out an investigation. This is to get as much information as the committee reasonably can about the employee's alleged misconduct or poor performance.

Step 4 The hearing

Where the investigation shows the employee has a case to answer, the committee should invite them to a disciplinary hearing. This is a meeting where the committee hears all the evidence before making a decision.

Preparing for the hearing

The hearing should be held as soon as possible after the investigation, while giving reasonable time for the employee to prepare.

In good time before the hearing, the committee should put in writing to the employee the allegations, evidence, date, time and location of the hearing, the right to be accompanied and the possible outcomes.

The right to be accompanied

By law, an employee or worker has the right to be accompanied at a disciplinary hearing.

What happens in a disciplinary hearing

The hearing is the chance for both the committee and the employee to state their case.

At the end of the hearing, the committee should take time to consider the case carefully before making a decision and should confirm the outcome in writing.

Step 5 Deciding the outcome

After following a fair disciplinary procedure, the committee should decide on the best outcome based on the findings, what is fair and reasonable, and what the committee has done in similar cases before.

Dismissal

The committee might recommend to the council to dismiss the employee where appropriate. Dismissal of the clerk/RFO should only be agreed by the full council.

The council and the committee must follow a fair and reasonable disciplinary procedure before deciding on dismissal.

The employee's right of appeal

The council/committee should offer the employee the right of appeal.

Step 6 After the disciplinary

After a disciplinary procedure has finished, the committee may talk privately with staff directly involved while keeping the outcome confidential.

Keeping a record

The council/committee should keep a written record of all disciplinary cases in line with data protection law.

References after disciplinary action

By law, the council/committee does not have to provide a reference. When it does, it must be fair, accurate and consistent.

This procedure was adopted by the council at its meeting held on 28th May 2026.

Mudford Parish Council
EXPENSES POLICY

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General procedure	2
Homeworkers	3
Training	3
Travel	3
Overnight accommodation	4
Meals	5
Entertainment/gifts	5
Annual events	5
Expenses that will not be reimbursed	5
False claims	6

Purpose

This policy sets out the council's rules on how employees can claim for expenses incurred in the performance of their duties for the council. The purpose of this policy is to ensure that employees are properly reimbursed for legitimate business expenses and to ensure that these expenses are treated appropriately for tax purposes. It does not apply to councillors.

General procedure

The council will reimburse you for actual expenditure that is incurred wholly, necessarily and exclusively in connection with authorised duties that you undertake in the course of your employment. To claim for expenses, you must use the council's expenses claim form and set out the reasons why the expense was incurred on the claim form. If you are unsure whether an expense can be claimed, you must seek prior written authorisation from the Chair of Governance and Resources Committee or the clerk.

Expenses will not be paid unless supporting evidence is provided, together with a completed expense claim form. This should include original receipts or invoices with the date and time of the transaction (unless you are claiming for mileage). When claiming for travel expenses on public transport, you should enclose the tickets showing the departure point and destination of your journey, where possible. Credit and debit card statements will not be accepted. Where you are submitting a VAT receipt, you should set out:

- the name and VAT registration number of the retailer or service provider;
- the goods and services provided; and
- the amount of VAT payable.

Once completed and signed, you should submit your expense claim form to the clerk or Chair of Governance and resources Committee for approval. Once approved the claim form should be sent to the clerk/RFO for payment.

Expenses claims must be submitted within 30 days of the expense being incurred. If this is not practical, written approval for any extension will be required from the clerk or chair of the Governance and Resources Committee. The council reserves the right to withhold any payment where prior written approval has not been given.

The council may return an expense claim form to you without payment if it is completed incorrectly or lacks supporting evidence.

The council will pay claims for authorised expenses by BACS transfer into the same bank account into which your salary is paid.

In general, you should not incur expenses other than in the categories listed below. However, if you have claims for expenditure other than for those categories listed below, you should seek written approval from the clerk or Chair of the Governance and Resources Committee before incurring the expense. The council will accept email as written approval where it is required in this policy.

Any queries in relation to this policy should be directed to the clerk or Chair of the Governance and Resources Committee.

Homeworkers

If you are a Homeworker, your normal place of work as stated in your contract will be your home. The council will reimburse all reasonable expenses incurred by homeworkers in the course of their duties upon receipt of satisfactory claims.

The council will provide the following equipment necessary to enable homeworking employees to do their job.

- Laptop or personal computer

Alternatively, the council will agree with homeworkers a suitable sum to cover use of their own equipment.

The council will also pay the clerk/RFO for the costs associated with heating, lighting, etc. HMRC rules allow for some of these expenses to be paid tax-free (see HMRC guidance: www.gov.uk/expenses-and-benefits-homeworking/whats-exempt) at £26/month.

Training

When attending training courses all employees and be able to claim travel expenses for the difference in the usual home to work costs. Where the training takes place outside contracted daily hours, part-time employees should be paid on the basis as time spent on training is working time.

Some training can be very expensive and as a condition for funding training, the council requires full repayment of all costs incurred for any training course in excess of £100 should an employee not complete the training.

The council agrees to pay for the clerk's subscription to the Society of Local Council Clerks.

Travel

Employees and the Chair of the Governance and Resources Committee should consider whether or not travel is necessary or if there are more appropriate means (for example teleconferencing or video-conferencing).

Rail

You may claim for standard class rail fares only. Where possible, rail journeys should be booked well in advance to benefit from any discounts for early booking.

Use of your own car

It may be appropriate and cost-effective to use your own car when travelling on business, for example if you are travelling with other staff or councillors or, where there is limited public transport to your destination, or the journey time is significantly shorter than using public transport. Any use of your own car on business is subject to you:

- holding a full UK driving licence;
- ensuring that your car is roadworthy and fully registered; and

- holding comprehensive motor insurance that provides for business use.

Prior authorisation should be sought from the clerk or Chair of the Governance and Resources Committee before using your own car on business. The council accepts no liability for any accident, loss, damage or claim arising out of any journey that you make on business. The council will not pay for the cost of any insurance policy on your own car.

To claim for petrol expenditure, you should set out the distance of the journey undertaken on your expenses claim form. The council will pay you a mileage allowance of 45p per mile for mileage under 10,000 miles and 25p per mile for mileage over 10,000 miles, or such other rate as set out from time to time by HM Revenue and Customs. The council will pay for tolls, congestion charges and parking costs incurred, where applicable.

Use of bicycle or Motorcycle

If use of your bicycle or motorcycle is approved, you can claim a mileage allowance of 20p or 24p per mile respectively. Any use of your own motorcycle on business is subject the same requirements as a car (see above).

Taxis

Any use of taxis will require prior approval and only in limited circumstances. These are:

- where taking a taxi would result in a significantly shorter travel time than using public transport;
- where there are several employees travelling together; or
- where personal security and safety of employees is an issue, for example taxis may be permitted after 9.30pm.

You must obtain a receipt with details of the date, place of departure and destination of the journey.

Overnight accommodation

As a guideline for travel on council business you should book accommodation equivalent to three-star standard or less. You may book hotel accommodation of up to £120 maximum in a major city and £100 elsewhere. It is your responsibility to ensure that any hotel reservations are cancelled within the required cancellation period if they are no longer required.

Meals

If you are required to be away from home on council business, you may claim up to:

- £10 for breakfast (if this is not included in the hotel room rate);
- £15 for lunch; and
- £20 for dinner.

The maximum amounts above are inclusive of drinks. Alcohol cannot be reclaimed under any circumstances.

You should supply receipts and invoices for all hotel and meal expenses other than for the daily allowance, where no receipt is required.

Entertainment/gifts

The council has strict rules about offering or receiving both entertainment and gifts. Any gifts, rewards or entertainment offered to you should be reported immediately to the clerk or the Chair of the Governance and Resources Committee). As a general rule, small tokens of appreciation, for example flowers or a bottle of wine, may be retained by employees.

Annual events

The council may decide to hold a staff event, such as a Christmas meal or other celebration. Except where agreed to the contrary, attendance is not compulsory, and you will remain responsible for any expenses you incur.

Expenses that will not be reimbursed

The council will not reimburse you for:

- the cost of any travel between your home and usual place of work (except in exceptional circumstances for early morning/late night transport as set out above);
- the cost of any travel undertaken for personal reasons;
- the cost of any travel for your partner or spouse;
- any fines or penalties incurred while on council business for whatever reason, including penalties for not paying for a rail ticket in advance of boarding the train and penalties or fines associated with motoring offences, including speeding or parking fines, clamping or vehicle recovery charges;
- alcohol; and
- cash advances or withdrawals from an ATM machine.

You are required to pay for any travel costs incurred by your partner or spouse in the event that he or she accompanies you on business. Your spouse or partner must have adequate travel insurance for that journey.

False claims

If the council considers that any expenditure claimed was not legitimately incurred on behalf of the Council, it may request further details from you. The council will thoroughly investigate and check any expenses claim as it sees fit. It may withhold payment where insufficient supporting documents have been provided. Where payment has been made to you prior to the discovery that the claim was not legitimate or correct, it may deduct the value of that claim from your salary.

Any abuse of the council's expenses policy will not be tolerated. This includes, but is not limited to:

- false expenses claims;
- claims for expenses that were not legitimately incurred;
- claims for personal gain;
- claims for hospitality and/or gifts without them having been declared; and

- receipt by you of hospitality and/or gifts from contacts that may be perceived to influence your judgment.

The council will take disciplinary action where appropriate and, in certain circumstances, may treat a breach of this policy as gross misconduct, which may result in your summary dismissal. In addition, the council may report the matter to the police for investigation and criminal prosecution.

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

This policy was adopted by the council at its meeting held on 28th May 2026.

Mudford Parish Council

Document Retention and Disposal Procedure

Introduction

The council accumulates a vast amount of information and data during the course of its everyday activities. This includes data generated internally in addition to information obtained from individuals and external organisations. This information is recorded in various different types of documents.

Records created and maintained by the council are an important asset and as such measures need to be undertaken to safeguard this information. Properly managed records provide authentic and reliable evidence of the council's transactions and are necessary to ensure it can demonstrate accountability.

Documents may be retained in either hard copy form or in electronic forms. For the purpose of this procedure, 'document' and 'record' refers to both hard copy and electronic records.

It is imperative that documents are retained for an adequate period of time. If documents are destroyed prematurely the council and individual officers concerned could face prosecution for not complying with legislation and it could cause operational difficulties, reputational damage, and difficulty in defending any claim brought against the council.

In contrast to the above the council should not retain documents longer than is necessary. Timely disposal should be undertaken to ensure compliance with the General Data Protection Regulation so that personal information is not retained longer than necessary. This will also ensure the most efficient use of limited storage space.

Scope and objectives of the procedure

The aim of this document is to provide a working framework to determine which documents are:

- retained – and for how long
- disposed of – and if so by what method

There are some records that do not need to be kept at all or that are routinely destroyed in the course of business. This usually applies to information that is duplicated, unimportant or only of a short-term value. Unimportant records of information include:

- 'With compliments' slips
- catalogues and trade journals
- non-acceptance of invitations
- trivial electronic mail messages that are not related to council business
- requests for information such as maps, plans, or advertising material
- out of date distribution lists.

Duplicated and superseded material such as stationery, manuals, drafts, forms, address books, and reference copies of annual reports may be destroyed.

Records should not be destroyed if the information can be used as evidence to prove that something has happened. If destroyed the disposal needs to be disposed of under the General Data Protection Regulation.

Roles and responsibilities for document retention and disposal

Councils are responsible for determining whether to retain or dispose of documents and should undertake a review of documentation at least on an annual basis to ensure that any unnecessary documentation being held is disposed of under the General Data Protection Regulation.

Councils should ensure that all employees are aware of the retention/disposal schedule.

Document retention protocol

Councils should have in place an adequate system for documenting the activities of their service. This system should take into account the legislative and regulatory environments to which they work.

Records of each activity should be complete and accurate enough to allow employees and their successors to undertake appropriate actions in the context of their responsibilities to:

- facilitate an audit or examination of the business by anyone so authorised
- protect the legal and other rights of the council, its clients, and any other persons affected by its actions
- verify individual consent to record, manage, and record disposal of their personal data
- provide authenticity of the records so that the evidence derived from them is shown to be credible and authoritative,

To facilitate this the following principles should be adopted:

- records created and maintained should be arranged in a record-keeping system that will enable quick and easy retrieval of information under the General Data Protection Regulation
- documents that are no longer required for operational purposes but need retaining should be placed at the records office.

The retention schedules in Appendix A: List of Documents for Retention or Disposal provide guidance on the recommended minimum retention periods for specific classes of documents and records. These schedules have been compiled from recommended best practice from the Public Records Office, the Records Management Society of Great Britain, and in accordance with relevant legislation.

Whenever there is a possibility of litigation, the records and information that are likely to be affected should not be amended or disposed of until the threat of litigation has been removed.

Document disposal protocol

Documents should only be disposed of if reviewed in accordance with the following questions:

- Is retention required to fulfil statutory or other regulatory requirements?
- Is retention required to meet the operational needs of the service?
- Is retention required to evidence events in the case of dispute?
- Is retention required because the document or record is of historic interest or intrinsic value?

When documents are scheduled for disposal, the method of disposal should be appropriate to the nature and sensitivity of the documents concerned. A record of the disposal will be kept to comply with the General Data Protection Regulation.

Documents can be disposed of by any of the following methods:

- non-confidential records: place in wastepaper bin for disposal
- confidential records or records giving personal information: shred documents
- deletion of computer records
- transmission of records to an external body such as the County Records Office

The following principles should be followed when disposing of records:

- all records containing personal or confidential information should be destroyed at the end of the retention period. Failure to do so could lead to the council being prosecuted under the General Data Protection Regulation, the Freedom of Information Act or cause reputational damage

- where computer records are deleted steps should be taken to ensure that data is 'virtually impossible to retrieve' as advised by the Information Commissioner
- where documents are of historical interest it may be appropriate that they are transmitted to the County Records office
- back-up copies of documents should also be destroyed (including electronic or photographed documents unless specific provisions exist for their disposal).

Records should be maintained of appropriate disposals. These records should contain the following information:

- the name of the document destroyed
- the date the document was destroyed
- the method of disposal

Data Protection Act 2018 – obligation to dispose of certain data

The Data Protection Act 2018 ('Fifth Principle') requires that personal information must not be retained longer than is necessary for the purpose for which it was originally obtained. Section 1 of the Data Protection Act defines personal information as:

Data that relates to a living individual who can be identified:

- a. from the data; or
- b. from those data and other information which is in the possession of, or is likely to come into the possession of the data controller.

It includes any expression of opinion about the individual and any indication of the intentions of the council or other person in respect of the individual.

The Data Protection Act provides an exemption for information about identifiable living individuals that is held for research, statistical, or historical purposes to be held indefinitely provided that the specific requirements are met.

Councils are responsible for ensuring that they comply with the principles under the General Data Protection Regulation namely:

- personal data is processed fairly and lawfully and, in particular, shall not be processed unless specific conditions are met
- personal data shall only be obtained for specific purposes and processed in a compatible manner
- personal data shall be adequate, relevant, but not excessive
- personal data shall be accurate and up to date

- personal data shall not be kept for longer than is necessary
- personal data shall be processed in accordance with the rights of the data subject
- personal data shall be kept secure

External storage providers or archivists that are holding council documents must also comply with the above principles of the General Data Protection Regulation.

Scanning of documents

In general, once a document has been scanned on to a document image system the original becomes redundant. There is no specific legislation covering the format for which local government records are retained following electronic storage, except for those prescribed by HM Revenue and Customs.

As a general rule hard copies of scanned documents should be retained for three months after scanning.

Original documents required for VAT and tax purposes should be retained for six years unless a shorter period has been agreed with HM Revenue and Customs.

The original, signed AGAR should also be retained in perpetuity – as should all minutes of meetings. These documents should be deposited with the County Archives when possible.

Review of document retention

It is planned to review, update and, where appropriate, amend this document on a regular basis (at least every three years in accordance with the Code of Practice on the Management of Records issued by the Lord Chancellor).

This document has been compiled from various sources of recommended best practice and with reference to the following documents and publications:

- *Local Council Administration*, Charles Arnold-Baker, 14th edition, Chapter 11
- The National Association of Local Councils (NALC) – *Local Council Documents and Records*, August 2022
- NALC – *Freedom of Information*, April 2021
- [Lord Chancellor's Code of Practice on the Management of Records issued under Section 46 of the Freedom of Information Act 2000](#)

List of documents

The full list of the council's documents and the procedures for retention or disposal can be found in Appendix A: List of Documents for Retention and Disposal. This is updated regularly in accordance with any changes to legal requirements.

This policy was adapted from SLCC's (Society of Local Council Clerks) document, and the copyright remains with SLCC.

Mudford Parish Council

Mudford Parish Council Appendix A: List of documents for retention or disposal

Document	Minimum Retention Period	Reason	Disposal
Minutes	Indefinite	Archive	Original signed paper copies of council minutes of meetings must be kept indefinitely in safe storage. At regular intervals of not more than five years they should be archived and deposited with the Higher Authority
Agendas	Five years	Management	Bin (shred confidential waste)
Accident/incident reports	20 years	Potential claims	Confidential waste. A list will be kept of those documents disposed of to meet the requirements of the GDPR
Scales of fees and charges	Six years	Management	Bin
Receipt and payment accounts	Indefinite	Archive	N/A
Receipt books of all kinds	Six years	VAT	Bin
Bank statements including deposit/savings accounts	Last completed audit year	Audit	Confidential waste
Bank paying-in books	Last completed audit year	Audit	Confidential waste
Cheque book stubs	Last completed audit year	Audit	Confidential waste

Document	Minimum Retention Period	Reason	Disposal
Quotations and tenders	Six years	Limitation Act 1980 (as amended)	Confidential waste. A list will be kept of those documents disposed of to meet the requirements of the GDPR
Paid invoices	Six years	VAT	Confidential waste
Paid cheques	Six years	Limitation Act 1980 (as amended)	Confidential waste
VAT records	Six years generally but 20 years for VAT on rents	VAT	Confidential waste
Petty cash, postage, and telephone books	Six years	Tax, VAT, Limitation Act 1980 (as amended)	Confidential waste
Timesheets	Last completed audit year Three years	Audit (requirement) Personal injury (best practice)	Bin
Wages books/payroll	12 years	Superannuation	Confidential waste
Insurance policies	While valid (but see next two items below)	Management	Bin
Insurance company names and policy numbers	Indefinite	Management	N/A

Document	Minimum Retention Period	Reason	Disposal
Certificates for insurance against liability for employees	40 years from date on which insurance commenced or was renewed	The Employers' Liability (Compulsory Insurance) Regulations 1998 (SI 2753) Management	Bin
Play area equipment inspection reports	21 years		
Investments	Indefinite	Audit, management	N/A
Title deeds, leases, agreements, Contracts	Indefinite	Audit, management	N/A
Members' allowances register	Six years	Tax, Limitation Act 1980 (as amended)	Confidential waste. A list will be kept of those documents disposed of to meet the requirements of the GDPR
Information from other bodies e.g. circulars from county associations, the National Association of Local Councils (NALC), principal authorities	Retained for as long as it is useful and relevant		Bin

Document	Minimum Retention Period	Reason	Disposal
Local/historical information	Indefinite – to be securely kept for benefit of the parish	Councils may acquire records of local interest and accept gifts or records of general and local interest in order to promote the use for such records (defined as materials in written or other form setting out facts or events or otherwise recording information)	N/A

Document	Minimum Retention Period	Reason	Disposal
Magazines and journals	<p>Council may wish to keep its own publications</p> <p>For others retain for as long as they are useful and relevant</p>	<p>The Legal Deposit Libraries Act 2003 (the 2003 Act) requires a local council which after 1 February 2004 has published works in print (this includes a pamphlet, magazine or newspaper, a map, plan, chart or table) to deliver, at its own expense, a copy of them to the British Library Board (which manages and controls the British Library). Printed works as defined by the 2003 Act published by a local council therefore constitute materials which the British Library holds</p>	Bin if applicable
Record-keeping			

Document	Minimum Retention Period	Reason	Disposal
<p>To ensure records are easily accessible it is necessary to comply with the following:</p> <ul style="list-style-type: none"> • A list of files stored in cabinets will be kept • Electronic files will be saved using relevant file names 	<p>The electronic files will be backed up in a cloud-based programme as appropriate.</p>	<p>Management</p>	<p>Documentation no longer required will be disposed of, ensuring any confidential documents are destroyed as confidential waste</p> <p>A list will be kept of those documents disposed of to meet the requirements of the GDPR</p>
<p>General correspondence</p>	<p>Unless it relates to specific categories outlined in the policy, correspondence, both paper and electronic, should be kept. Records should be kept for as long as they are needed for reference or accountability purposes, to comply with regulatory requirements or to protect legal and other rights and interests.</p>	<p>Management</p>	<p>Bin (shred confidential waste)</p> <p>A list will be kept of those documents disposed of to meet the requirements of the GDPR.</p>

Document	Minimum Retention Period	Reason	Disposal
Correspondence relating to staff	If related to Audit, see relevant sections above. Should be kept securely and personal data in relation to staff should not be kept for longer than is necessary for the purpose it was held. Likely time limits for tribunal claims between 3–6 months. Recommend this period be for three years	After an employment relationship has ended, a council may need to retain and access staff records for former staff for the purpose of giving references, payment of tax, national insurance contributions, and pensions, and in respect of any related legal claims made against the council	Confidential waste A list will be kept of those documents disposed of to meet the requirements of the GDPR
<p>Documents from legal matters, negligence, and other torts</p> <p>Most legal proceedings are governed by the Limitation Act 1980 (as amended). The 1980 Act provides that legal claims may not be commenced after a specified period. Where the limitation periods are longer than other periods specified, the documentation should be kept for the longer period specified. Some types of legal proceedings may fall within two or more categories. If in doubt, keep for the longest of the three limitation periods.</p>			
Negligence	Six years		Confidential waste. A list will be kept of those documents disposed of to meet the requirements of the GDPR
Defamation	One year		Confidential waste. A list will be kept of those documents disposed of to meet the requirements of the GDPR

Document	Minimum Retention Period	Reason	Disposal
Contract	Six years		Confidential waste. A list will be kept of those documents disposed of to meet the requirements of the GDPR
Leases	12 years		Confidential waste
Sums recoverable by statute	Six years		Confidential waste
Personal injury	Three years		Confidential waste
To recover land	12 years		Confidential waste
Rent	Six years		Confidential waste
Breach of trust	None		Confidential waste
Trust deeds	Indefinite		N/A
For Halls, centres, recreation grounds			
<ul style="list-style-type: none"> • Application to hire • Invoices 	Six years	VAT	Confidential waste
Record of tickets issued			A list will be kept of those documents disposed of to meet the requirements of the GDPR
Lettings diaries	Electronic files linked to accounts	VAT	N/A
Terms and conditions	Six years	Management	Bin
Event monitoring forms	Six years unless required for claims, insurance or legal purposes	Management	Bin. A list will be kept of those documents disposed of to meet the requirements of the GDPR
For allotments			

Document	Minimum Retention Period	Reason	Disposal
Register and plans	Indefinite	Audit, management	N/A
Minutes	Indefinite	Audit, management	N/A
Legal papers	Indefinite	Audit, management	N/A
For burial grounds			
<ul style="list-style-type: none"> • Register of fees collected • Register of burials • Register of purchased graves • Register/plan of grave spaces • Register of memorials • Applications for interment • Applications for right to erect memorials • Disposal certificates • Copy certificates of grant of exclusive right of burial 	Indefinite	Archives, Local Authorities Cemeteries Order 1977 (SI 204)	N/A
Planning papers			
Applications	One year	Management	Bin
Appeals	One year unless significant development	Management	Bin
Trees	One year	Management	Bin
Local development plans	Retained as long as in force	Reference	Bin
Local plans	Retained as long as in force	Reference	Bin

Document	Minimum Retention Period	Reason	Disposal
Town/neighbourhood plans	Indefinite – final adopted plans	Historical purposes	N/A
CCTV			
Daily notes	Daily	Data protection	Confidential waste
Radio rotas	One week	Management	Confidential waste
Work rotas	One month	Management	Confidential waste
Observation sheets	Three years	Data protection	Confidential waste
Stats	Three years	Data protection	Confidential waste
Signing in sheets	Three years	Management	Confidential waste
Review requests	Three years	Data protection	Confidential waste
Discs – master and working	For as long as required	Data protection	Confidential waste
Internal Operations Procedure Manual	Destroy on renewal Review annually	Management	Confidential waste
Code of Practice	Destroy on renewal Review annually	Management	Confidential waste
Photographs/digital prints	31 days	Data protection	Confidential waste

This document is based on a Society of Local Council Clerks (SLCC) document, and the copyright remains with SLCC.

26/90 To determine the time and place of ordinary meetings of the council up to and including the next annual meeting of the council.

Thursdays, Mudford Village Hall at 19:00

Suggested dates:

25th June 2026

30th July 2026

27th August 2026

24th September 2026

29th October 2026

26th November 2026

No meeting in December

14th January 2027

25th February 2027

25th March 2027

29th April 2027

27th May 2027 – Annual Parish Council Meeting

26/91 To agree a statement to be sent to NHS Somerset Integrated Care Board (ICB) and Somerset Foundation Trust (SFT) regarding the imminent closure of the Hyper Acute Stroke Unit (HASU) at Yeovil District Hospital.

Dear Sir/Madam,

Mudford Parish Council writes to make representations regarding the proposed closure of the Hyper Acute Stroke Unit (HASU) at Yeovil District Hospital.

The Council strongly disagrees with the decision to close this facility. Stroke treatment is extremely time critical, and the evidence presented indicates that patients from our area will face significantly longer journey times if required to travel to Musgrove Park Hospital or Dorset County Hospital. This raises serious concerns about patient outcomes.

We understand that over 500 patients each year are currently taken to Yeovil as their nearest HASU, and that the proposed changes could add, on average, around 24 minutes to travel times. The data shared also suggests that performance against the national three-hour treatment standard is already below target and is likely to worsen considerably if the closure goes ahead.

The Council is not satisfied that sufficient mitigation measures are in place. Proposed improvements to in-hospital processes appear uncertain, have not yet been implemented locally, and there is no clear evidence they will offset the additional travel time. There is also a lack of clarity around arrangements at receiving hospitals and the future of pilot schemes such as pre-hospital video triage.

In addition, there is a concern that patients who attend Yeovil District Hospital directly will face further delays if they then need to be transferred elsewhere.

For these reasons, Mudford Parish Council urges the Integrated Care Board to reconsider this decision. At the very least, the Council requests that the closure is postponed until robust, proven measures are in place to ensure that patient outcomes will not be adversely affected.

The Council would welcome further engagement on this matter.

Yours faithfully,

Petra Galloway
Parish Clerk/RFO
Mudford Parish Council