



CRANLEIGH PARISH COUNCIL

NAME	DAVID HARRISON
<p>Please use the space below to outline your reasons for seeking co-option to Cranleigh Parish Council.</p> <p>I am 67 years old and moved to Cranleigh 6 years ago from Heathhead. My wife and I now live on the Guildford Road. We have actively involved ourselves in the area since moving, having joined the local USA and volunteering at Cranleigh Arts Centre and the local National Trust site at Winkworth.</p> <p>As the area around Cranleigh becomes ever more popular, this inevitably brings extra pressures to bear around planning and infrastructure and it is important to protect the beautiful area we live in as well as supporting this growth moving forwards. I feel my background and experience working with parish councillors on planning applications and transport management can help me support the local community and I would love the opportunity to do so.</p> <p>Before retiring last year, I worked for many years in Project management. Since retiring I have continued to pursue passions in cycling and music. I have 5 grown up daughters and they and their families all love Cranleigh and the surrounding Surrey Hills.</p> <p>Please note that this form will be included as a background paper with the agenda for the Council meeting at which your co-option is considered and will be accessible on the Parish Council's website.</p>	

Cranleigh Villages Group Survey

To
establish the Health and Wellbeing needs/gaps in our area

To assist
in implementing health creation/illness prevention in our
community

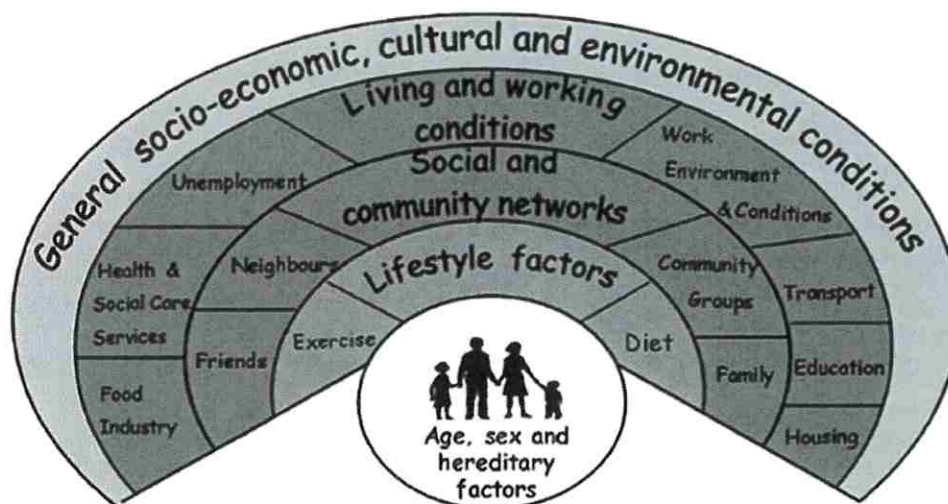
To assist collaboration
of all parties involved (NHS, Surrey CC, voluntary and social care groups,
local people...) to address those priorities and any barriers to achieving them

To empower our residents to optimize their own
and others' health and wellbeing

* Indicates required question

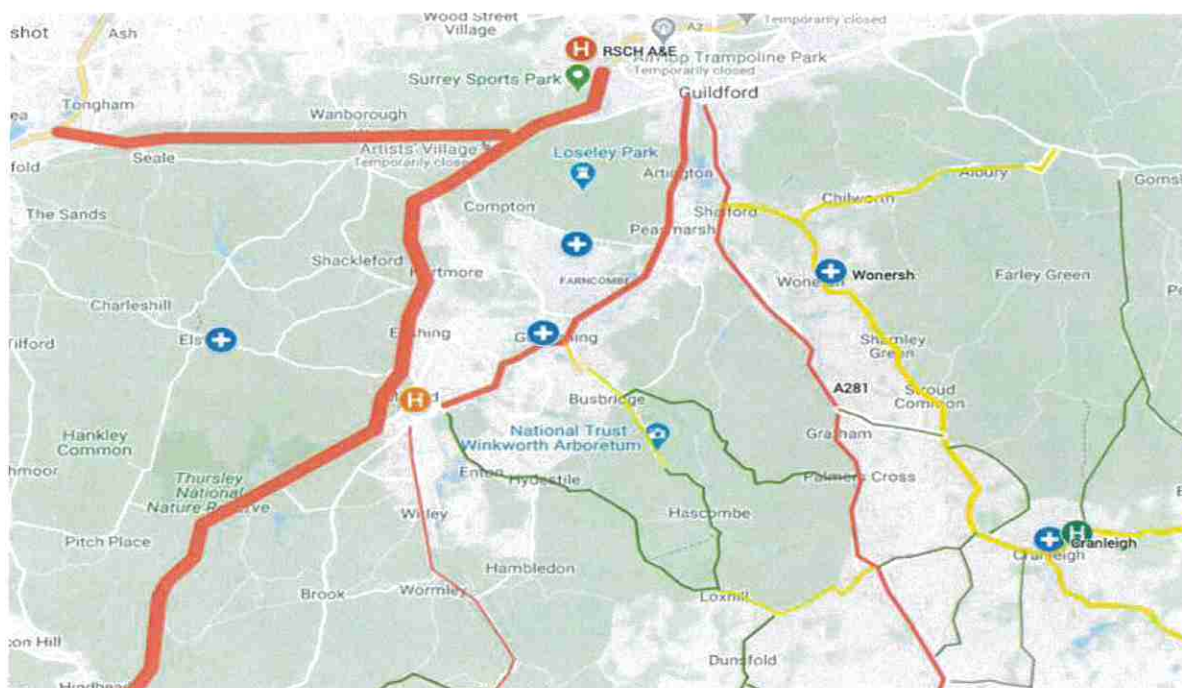
For reference

Health and Wellbeing Considerations



Adapted from: Dahlgren and Whitehead (with permission)^[3]

Cranleigh & Villages: Illustration of transport & geographical disadvantage



For reference: Travel times from Cranleigh to access Hospital health care

Destination	By Car		Comments
	Peak	Off Peak	
Cranleigh to RSCH A&E	45-55 mins	35-45 mins	Main route to Guildford is via "B" roads to the A281- the only "A" route accessible from Cranleigh area.
Cranleigh to Haslemere MIU Time	40-45 mins	29-34 mins	Routes via Chiddingfold and other cross country are isolated, narrow, unlit; especially difficult in winter
Cranleigh to Milford Hosp Time	30-35	24-29 mins	The route includes single track roads with no lighting; alternative via Guildford and Godalming much longer

Destination	By Public Transport		Comment
	Peak	Off Peak	
Cranleigh to RSCH A&E Time	60-90 mins	60 mins	Timings exclude waiting times for connecting bus.
Cranleigh to Haslemere MIU Time	85 mins	58 mins	See Bus route comment below
Cranleigh to Milford Hosp Time	65 Mins	65 mins	See bus route comments below

1. 1. Your Details

Mark only one oval.

- ☐ Female
- ☐ Male
- ☐ Prefer Not To Say
- ☐ Other

2. 2. Your Age

Mark only one oval.

- ☐ 0-14
- ☐ 15-24
- ☐ 25-64
- ☐ 65+

3. 3. How long have you lived in Cranleigh and Villages?

Mark only one oval.

- ☐ Under 1 year
- ☐ 1-5 years
- ☐ 6-10 years
- ☐ Over 10 years

4. 4. Where do you live?

Mark only one oval.

- ☐ Alfold
- ☐ Cranleigh
- ☐ Dunsfold
- ☐ Ewhurst
- ☐ Other

5. 5. Support for which age group matters most to you?

Mark only one oval.

- ☐ Early life
- ☐ Mid life
- ☐ Later life
- ☐ All age groups

6. 6. What are the benefits of living here? (Cranleigh and Villages)? Please check *
all that apply

Check all that apply.

- ☐ Access to green spaces
- ☐ Close to family
- ☐ Good schools
- ☐ Leisure facilities
- ☐ Sense of community
- ☐ Other: _____

7. if you chose "other", please give brief details

8. 7. What are the challenges living here? Please check all that apply

Check all that apply.

- ☐ Access to emergency health services
- ☐ Access to health facilities
- ☐ Internet and wifi coverage
- ☐ Lack of community meeting spaces
- ☐ Loneliness
- ☐ Public transport
- ☐ Other: _____

9. If you chose "other" please give brief details below

10. 8. Which of these challenges are the most important to you personally?

Check all that apply.

- ☐ Access to emergency health services
- ☐ Access to health facilities
- ☐ Internet and wifi coverage
- ☐ Lack of community meeting spaces
- ☐ Loneliness
- ☐ Public Transport
- ☐ Other: _____

11. If you chose "other" please give brief details

12. 9. Which of these challenges are the most important to the wider community?

Check all that apply.

- ☐ Access to emergency health services
- ☐ Access to health facilities
- ☐ Internet and wifi coverage
- ☐ Lack of community meeting spaces
- ☐ Loneliness
- ☐ Public Transport
- ☐ Other: _____

13. 10. What do you currently do to support your health and Wellbeing? Please check all that apply

Check all that apply.

- ☐ Culture eg Art, History Society
- ☐ Cycling/Horseriding
- ☐ Exercise class
- ☐ Friendship groups
- ☐ Hobbies/Crafting
- ☐ Learning/Studying
- ☐ Social group eg Age Uk/ Scouts
- ☐ Sports Clubs
- ☐ Volunteering
- ☐ Walking/Running
- ☐ Other: _____

14. If you chose "other", please give brief details

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Google Forms

Carrying out a Community Asset Plan Analysis of your Village

- The values of communities and their groups in supporting people and promoting physical and mental wellbeing, while tackling some of the challenges we face (loneliness and isolation and inequalities) are essential.
- The potential for communities to collaborate with and enhance services from statutory health service by addressing holistic health and wellbeing is endless.

A Community Asset Plan Analysis (CAPA) will need to be carried out by each relevant Parish Council. This helps by collating information which could help influence planning and decision making for the future. You will end up with a snapshot of what your village has now and what is needed in the future to improve lives of people who live there.

From your analysis, identify key actions needed and areas for focus, prioritise in terms of urgent, important, quick wins and long-term plans. Engagement with the community and community-based groups is critical.

This is not a prescriptive template but may serve to guide analysis of what is available and what is needed in your village.

(Village) Facilities, Venues, Challenges and Vision for future.

Date **Community Asset Plan Analysis undertaken:** dd/mm/yyyy (it can only ever be a snapshot in time – date is critical)

Strengths (examples)	Weaknesses (examples)
<ul style="list-style-type: none"> • Buildings <ul style="list-style-type: none"> ◦ e.g. Village Hall – activities through the week or ad hoc ◦ Sports and/or Social Clubs – activities and facilities for local people • Day Nurseries/Centres • Places of faith – support groups offered via such places • Shops, Pubs, Cafés, petrol stations, restaurants, Post Offices • Social and Cultural <ul style="list-style-type: none"> ◦ e.g. arts centres, arts groups, Community cafes, groups, book clubs, frequency, access, pre-school groups, youth groups, luncheon clubs. Men's sheds • Sports and fitness <ul style="list-style-type: none"> ◦ walking groups, gardening, allotments ◦ exercise classes, yoga, Pilates • Social Media and Parish Magazines • Veterinary Practices and doggy day care facilities 	<ul style="list-style-type: none"> • Access to services • Any shortage of activities for particular population groups • Communication e.g. wifi coverage, access to local information, Parish Council information • Education <ul style="list-style-type: none"> ◦ Schools and colleges, other learning groups • Geographical Layout - any inhibiting factors <ul style="list-style-type: none"> ◦ e.g. access to medical care, access to transport, age-related activity youth clubs, nurseries, stay & play sessions), minority group related activity • Population issues • Transport <ul style="list-style-type: none"> ◦ Bus routes ◦ Cycle routes ◦ Car ownership ◦ Access to rail networks ◦ Safe walking
Opportunities (examples)	Threats (examples)
<ul style="list-style-type: none"> • Access to information • Projects - in progress or for discussion with your local Community. Examples: <ul style="list-style-type: none"> ◦ All age-related needs – e.g. young people, young families, small children, older people, working age adults ◦ Library facilities ◦ Wellbeing ◦ Community transport ◦ Secure dog field ◦ Infrastructure projects ◦ Access to funding 	<ul style="list-style-type: none"> • Community Safety • Engagement with Heath Providers/Social Prescribers – in the face of high demand and conflicting priorities • Housing, waste water management, road systems, transport, telecommunications and internet <ul style="list-style-type: none"> ◦ Flooding ◦ Sewage • Infrastructure • Public Transport

CRANLEIGH PARISH COUNCIL – STANDING COMMITTEES AND OBSERVERS ON OUTSIDE BODIES 2024/25				
Parish Council	Finance Committee (Max. 7)	Planning Committee (Max. 12)	Personnel Committee (Max. 5)	Property & Asset Committee (Max. 12)
Claire Bennett	Trevor Cobby	Claire Bennett	Rosemary Burbridge**	Rosemary Burbridge
Rosemary Burbridge	Dave Nicholas**	Rosemary Burbridge**	Hannah Nicholson	Trevor Cobby**
Trevor Cobby	Marc Scully	Dave Nicholas	Marc Scully	Alan Morrison
Alan Morrison	Rowena Tyler	Hannah Nicholson	Rowena Tyler	Dave Nicholas*
Dave Nicholas	Liz Townsend	Marc Scully	Mark West*	Marc Scully
Hannah Nicholson	Clive Walker*	Rowena Tyler*		Clive Walker*
Marc Scully*	Mark West	Clive Walker		
Liz Townsend				
Rowena Tyler				
Clive Walker**				
Mark West				
* Chairman				
** Vice Chairman				
Subject Access Request				
				Dave Nicholas**
				Marc Scully
				Liz Townsend
				Rowena Tyler
				Clive Walker*

PARISH COUNCIL OBSERVERS		Observer	Reserve
Chamber of Commerce	BID rep	M Scully	
Climate Change Lead		M West	
Cranleigh Arts Centre		M Scully	
Cranleigh Brick and Tile Liaison Group		D Nicholas	
Cranleigh Community Fund		R Burbridge	
Cranleigh Health and Wellbeing		M Scully	
Cranleigh Heritage Trust		R Burbridge	
Cranleigh Library		E Townsend, R Tyler	
Cranleigh Networking Group		M Scully	
Cranleigh Vallendar Club		D Nicholas	
Cranleigh Neighbourhood Watch		H Nicholson	
Dementia Friendly Cranleigh		D Nicholas	
Destination Cranleigh		A Morrison	
Dunsfold Advisory Group		Vacancy	
Gatwick - CAGNE		C Walker	Rowena Tyler
High Street SCC Working Party		D Nicholas, C Walker	
Internal Audit		R Burbridge, H Nicholson	
Knowle Park		C Walker	Rowena Tyler
Leisure Centre		R Burbridge	
Older Persons Network		T Cobby	
Remembrance Day		R Burbridge	
Rowleys		M Scully, C Walker	
SALC		Clerk	
Surrey Police		R Burbridge, C Walker	
Town and Parish Council meeting (Waverley)	1 Cllr plus Clerk to attend	T Cobby, M Scully	
VJ Day		D Nicholas	
Waverley Cycle Forum		R Burbridge	
Wey & Arun Canal		B Bell, R Burbridge, H Nicholson, A Morrison, M Scully, E Townsend, R Tyler	
Youth Council		B Bell	
Youth Lead		R Burbridge	
Henry Smith Charity - 2 Councillors + 3 independent members		Brian Cheesman	Cathy Gould
		C Walker	
		Roy Gasper	

If you cannot attend a meeting please ensure that you alert either the deputy or the office so that Parish Council Representation is ensured.



Key Features

Business Current Account

Important information



For Businesses. For Communities. For Good.

www.unity.co.uk

Business Current Account

This document explains the key features of our Business Current Account and provides general information about this product.

Unity offers one Business Current Account with three pricing tariffs which are determined based upon the value of account turnover.

All accounts are subject to our decision criteria and we reserve the right to decline any Business Current Account application.

Important Information:

- Tier 3 accounts will be allocated a Relationship Manager.
- Access to a UK based customer service centre.
- No debit card available.
- We do not provide financial advice to our customers and you are not entitled to rely on us for advice or recommendations.
- We offer a Tier 0 account within our business current account range with limited facilities, that is free and reserved specifically for loan servicing only.

Summary:

- Manage your account online with 24/7 access with single, dual and triple authorisation of payments available using Online Banking.
- Personal customer service from our dedicated team who take the time to get to know your organisation.
- Access to the Unity Corporate MultiPay Card, which is Unity's charge card solution. This allows you to monitor cardholder spend and set transactional limits.
- Pay in cash and cheques on the high-street at NatWest (England and Wales), RBS (Scotland) or Ulster Bank (Northern Ireland), or cash only at the Post Office.
- Predictable, transparent monthly fees.
- Access to payment services such as BACS, Accepting Card Payments, International Payments and Bulk Faster Payments.
- Plan for the future with access to our range of Savings Accounts.

Key Features – Account overview

Terminology	Summary Definition
Account Name	Business Current Account
Credit Interest	0.00%
Debit Interest and overdrafts	Arranged overdrafts* are available on request and subject to eligibility criteria. The unarranged overdraft rate is a nominal rate of 25%, with an EAR** of 28.39%.
Transactional fees and charges	The Business Current Account has a fee of £6 per month. Transactional fees vary based upon your annual account turnover and tariff. See page 5 for more detail.
Frequency of charging	All account fees are charged monthly based on the previous month's transactions. Customers using Tier 2 and Tier 3 tariffs will also receive a monthly pre-notification of all Transactional fees and charges.
Opening an account	All accounts must be opened online using Unity's application form and an initial deposit of £500 (by electronic payment) is required.

* Not available with the T0 Loan Servicing Account

** Equivalent Annual Rate: This is equivalent to the rate of interest you'll pay if you're overdrawn for a year. You'll pay interest on the amount you're overdrawn by, and on the interest that builds up from being overdrawn.

Terminology	Summary Definition
Eligibility Criteria	UK based organisation and standard screening checks apply.
Cancellation period	<p>If you change your mind after you have opened the account and decide you don't want it, you can close your account and have your money returned, as well as any account fees you have paid and interest you have earned provided that you tell us you want to close your account within 14 days of the later of the date you opened your account, or when you received the <u>General Terms and Conditions</u>. If you cancel or switch your account after this time, you won't be refunded any account fees.</p>
Closing account	<p>You can close your account at any time. To close your account please email us at <u>us@unity.co.uk</u> attaching a scanned instruction signed in accordance with the account mandate or write to us at: Unity Trust Bank PO Box 7193 Planetary Road Willenhall WV1 9DG. See <u>General Terms and Conditions</u> for more information.</p>

Key Features – Account Fees

We offer one Business Current Account where pricing is set dependant upon account turnover*.

Fee Description	Loan Servicing	Turnover below £100k*	Turnover between £100k & £2 million*	Turnover above £2 million*
	Tier 0	Tier 1	Tier 2	Tier 3
Account Fee	Free	£6 per month	£6 per month	£6 per month

Transactional Fees**

Not applicable	Not applicable	15p per individual transaction	Individual transaction cost negotiated across 3 transaction types**:
			1. Automated payments
			2. Faster payments
			3. Manual transactions

Other fees and charges**

See Standard Service Tariff	See Standard Service Tariff	See Standard Service Tariff	See Standard Service Tariff
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Relationship Manager

Yes	No	No	Yes
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Solely for loan servicing, day to day banking unavailable.

Account Restrictions

Turnover does not exceed £100k	Turnover does not exceed £2m	Turnover does not fall below £2m
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*Turnover is the total value of payments received into your account, excluding internal transfers, in a 12-month period.

**More information available at www.unity.co.uk/terms-and-conditions.

Key Features – Payment Services*

Receiving Payments	
Terminology	Summary Definition
Cash	A credit slip is required and cash can be deposited at any Post Office, NatWest (England and Wales), RBS (Scotland) or Ulster Bank (Northern Ireland). Please contact us to register for this service.
Cheque	A credit slip is required and cheques can be deposited at any NatWest or RBS branch.
Credit slips	Paying in books are available on request and will be typically sent to you within 10 working days.
Foreign Currency	Unity has one International Bank Account Number (IBAN) for all Unity accounts. You must specify this on all payments we will then route your funds to your specific account.
Faster Payments	Charged in accordance with your standard sales tariff.
BACS	Unity supports the receipt of BACS payments. Funds are credited to your account as soon as available.
CHAPS	Unity supports the receipt of CHAPS payments. Funds are credited to your account as soon as available.
Accepting Card Payments	Unity has partnered with Elavon to help customers accept card payments. For more information visit www.unity.co.uk/accepting-card-payments .

*These features are not applicable for Loan Servicing accounts.

For more information on fees and charges related to Unity's payment services please visit www.unity.co.uk/terms-and-conditions

Making Payments	
Terminology	Summary Definition
Cheque	Cheque books are available on request and will be typically sent to you within 10 working days.
Debit Card	Business Current Accounts do not have a debit card. Unity offers a Corporate MultiPay Charge Card. See www.unity.co.uk/corporate-multi-pay-card for more information.
Foreign Currency	Unity uses Western Union as its International Payments provider.
Faster Payments	<p>Charged in accordance with your standard sales tariff. Unity has 3 Faster Payment windows where payments are received each day. Cut off times are 10.00am, 12.00pm and 3.00pm. (payments after 15.00pm will be sent the following working day).</p> <p>Unity supports direct to BACS services and BACS Bureau services.</p> <ul style="list-style-type: none"> • Direct to BACS is supported by NatWest. For more information please contact us at 0345 140 1000. • Bureau services are available using Unity e-Payments. For more information please visit www.unity.co.uk/business-e-payments.
BACS	
CHAPS	Unity supports CHAPS payments, all payments are issued on written request. Payments are released immediately.

*These features are not applicable for Loan Servicing accounts.

For more information on fees and charges related to Unity's payment services please visit www.unity.co.uk/terms-and-conditions

Key Features – Using your account

Receiving Payments

Internet Banking

Unity has a suite of digital functionality to satisfy your day to day banking needs. You can view all current and savings accounts, send us secure messages, view digital statements, make single and bulk faster payments, and manage standing orders and Direct Debits. You can also subscribe to BACS services. Please note that there is no mobile app available on this account.

Customer Service Centre

All customers can access our Birmingham-based contact centre. Please call us on 0345 140 1000.

Relationship Manager

Available for accounts that have an annual turnover of more than £2,000,000 (Tier 3).

Clearing time-scales

The table below highlights typical clearing times, click to view our [Terms and Conditions](#) and [Standard Service Tariff](#).

	NatWest/RBS	Ulster Bank	Post Office
Receive cash deposits	Yes	Yes	Yes
Cash deposit clearing	Deposit day +2	Deposit day +2	Deposit day +2
Cash withdrawals	Yes	Yes	No
Coin provision	No	No	Yes
Cheque Clearing	Yes	Yes	No

General Information



This information is available to you at any time on our website.
Please read this important information carefully and retain it for future reference.

Further information

All Business Current Accounts are subject to **status and Terms and Conditions apply.**

Unity adheres to the Lending Standards Board's Standards of Lending Practice which set the benchmark for good lending practice in the UK, outlining the way registered firms are expected to deal with their customers throughout the entire product life cycle.

The protections of the Standards of Lending Practice for business customers apply to businesses which at the point of lending:

- Have an annual turnover of up to £25 million in its last financial year (exclusive of VAT and other turnover related taxes), and;
- Does not have a complex ownership structure (for example, businesses with overseas, multiple or layered ownership structures).

More information can be obtained at www.lendingstandardsboard.org.uk

Go Paperless!

You can choose to receive online statements and we'll notify you by email or SMS when they're available. **Contact us** to switch to paperless statements.

Financial difficulties

If you would like more information about managing your finances, please speak to your Relationship Manager or call us on 0345 140 1000.

You can also find more information about financial difficulties in the Services section of our website – www.unity.co.uk/debt-counselling or by calling Business Debit Line on 0800 197 6026.

Start your application today by visiting www.unity.co.uk

How and where to complain

If you are not satisfied with any aspect of our service or products, you can tell us about your concerns. To find out how, please read our **dedicated complaints page**.

Contact us: ☎ Call us: 0345 140 1000 ✉ Email us: us@unity.co.uk 🌐 Visit us: www.unity.co.uk

Business Current Account

– Important Information

Switcher Guarantee

The Current Account Switch Service allows you to switch your current account from one bank or building society to another in a simple, reliable and stress-free way. It will only take seven working days. As your new current-account provider we offer the following guarantee.

For more information visit www.unity.co.uk/content/uploads/Current-Account-Switch-Guarantee.pdf



FSCS Compensation Scheme

It's good to know that your deposits are protected. If eligible, your deposits with Unity Trust Bank are protected up to a total of £85,000 by the Financial Services Compensation Scheme, the UK's deposit guarantee scheme.

For more information and to find out if you're eligible please visit www.unity.co.uk/fscs



Our Commitments to our business customers

As a lender we have committed to follow the Standards of Lending Practice for business customers. By adhering to the Standards, we are demonstrating a commitment to ensuring that our customers are treated fairly.

- We will lend responsibly and treat your business fairly and reasonably at all times.
- We will ensure that all information we provide about our products and how they work is clear and understandable so that you can decide what is best for your business' needs.
- We will provide clear, upfront information on the documents required to support an application. Taking account of this will help to ensure that we can deal with your application efficiently.
- If we are unable to approve your application, we will explain why and provide a referral, where appropriate, to alternative sources of finance.
- If your application is declined you have the right to appeal the decision.

- We will set out any requirements/conditions we may have to support any borrowing in a clear, understandable way.
- We will confirm the conditions of your business borrowing in writing and highlight any covenants or material conditions attached to it.
- We will clearly set out the type and frequency of information we will require to monitor the business' performance.
- If your business experiences difficulties, we will seek to understand the overall circumstances to try and identify suitable and pragmatic solutions. Where appropriate, we will provide details of free debt advice.



What we ask of you:

That, prior to making an application you double check what information we will need to process an application. If you are unsure or have any questions, please contact us.

Yes ☐

That all information you provide to us during our relationship is accurate and timely.

Yes ☐

We ask you to think carefully about whether the business can afford the product applied for and to be open in your dealings with us.

Yes ☐

To make sure that you understand the terms and conditions associated with your product.

Yes ☐

That you seek professional advice, where this is appropriate for the needs of your business and the type of product you are applying for.

Yes ☐

That the business maintains any commitments it has to us, for example providing information which we may reasonably request to monitor performance.

Yes ☐

Take care of any security information to help prevent fraud and protect your account(s).

Yes ☐

Tell us as soon as possible if someone is misusing confidential information.

Yes ☐

Carefully check your business' account statements/records to make sure they are accurate. If anything isn't right, please get in touch with us.

Yes ☐

Please let us know if

Your contact details change or there is a change in how your business is run for example, ownership/directorships etc, so we can keep our records up to date;

Yes ☐

Your business may be about to experience, or is experiencing difficulties. The sooner you do this, the more likely it is we'll be able to find a way to help you

Yes ☐



You can download our Key Features at: unity.co.uk

Unity Trust Bank is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Unity Trust Bank is entered in the Financial Services Register under number 204570. Registered Office: Four Brindleyplace, Birmingham, B1 2JB. Registered in England and Wales no. 1713124. Calls are recorded and may be monitored for security, training and quality purposes.

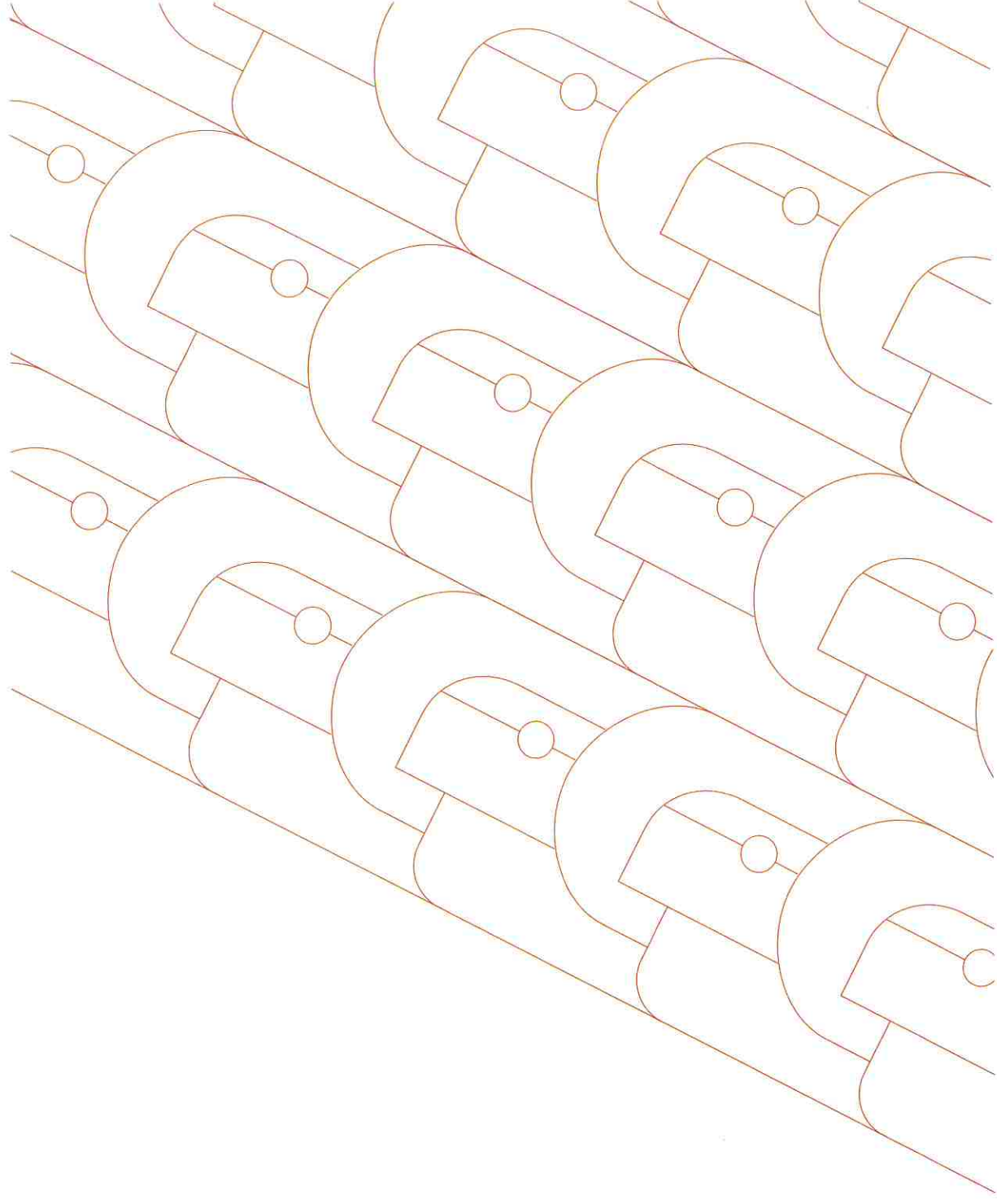
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For Businesses. For Communities. For Good.

www.unity.co.uk



Not-for-profit Brochure



Make your funding work as hard as you do

Join UK charities and organisations using the Insignis platform to earn more interest on their savings.

"The platform is straightforward to use and any queries we had were answered quickly and professionally."

Gavin Black
Head of Finance
Scottish Sports Future

With a single application, your organisation can access a wide selection of competitive savings accounts from our carefully chosen banks and building societies.

Broadening your access to deposit accounts can help you reduce risk and generate more interest on your savings, providing additional funding to support the communities you serve.

Eligible deposits are covered by FSCS protection.

V1 April 2025 | Insignis is a trading name of Insignis Asset Management Limited (Company number 09477376). Insignis Asset Management Limited is authorised and regulated by the Financial Conduct Authority (813442) for the provision of payment services.



Access thousands of savings accounts with one application

Optimise returns

Insignis offers access to exclusive rates from the banks and building societies that form a part of our panel. In 2024, our clients earned a total of £195m in interest from deposits placed across the wide range of savings accounts on our platform. Clients increased their returns while ensuring access to their funds in line with their liquidity needs.

Reduce bank risk

Enhance FSCS coverage and increase bank diversification by spreading your company's reserves across multiple banks and building societies.


Save time

Insignis saves time by streamlining the onboarding process. You only need to go through onboarding once, eliminating the need to repeatedly fill in multiple application forms for each savings account.

Effortlessly track and manage cash reserves

1

Complete an Insignis Application Form to open a Charity Account.

INSIGNIS 

Application Form

Charity Name:

Charity Address:

Charity Number:

2

Deposit cash and choose from our selection of savings accounts.

6 Month Fixed Term

5.15%

Easy Access


4.80%

1 Year Fixed Term

5.15%

3

Place, withdraw and re-invest funds.

INSIGNIS 


Portfolio

Bank A

£85,000

Easy Access

Rate: 4.43%


 Protected

Bank B

£85,000

95 days notice

Rate: 4.77%


 Protected

Bank C

£85,000

1 Year Fixed

Rate: 4.75%

 Protected

The rates shown are for illustrative purposes only and do not represent actual or guaranteed client rates.

View your organisation's cash assets in one platform

Portfolio

INSIGNIS

TOTAL

£415,830

TOTAL FUNDS PLACED

£540,000

HUB

£75,830

Place Funds from Hub

INTEREST RATE

4.42%

My Deposits

BANKS

shawbrook

nationwide

Investec

Close Brothers Savings

AMOUNT

£85,000

£85,000

£85,000

£85,000

RATE

4.22%

4.40%

4.45%

4.61%

PRODUCT

Easy Access

3 Month Fixed (Term)

95 Days Notice

1 Year Fixed (Term)

Terms & Conditions

AVAILABLE

Now

10-July-2025

10-Apr-2026

Terms & Conditions

Withdraw

Add Funds

Give Notice

Add Funds

Rates shown are for illustrative purposes only and do not represent actual or guaranteed client rates. Rates are subject to change and may vary depending on client type, product availability, and minimum and maximum deposit sizes.

Choose from a selection of 45+ banks and building societies

Goldman
Sachs



Investec

nationwide

Sainsbury's
Bank

unity trust
bank

Aldermore



ARBUTHNOT LATHAM
Private Bankers
SINCE 1833

BBVA

Cambridge &
Counties Bank
Built on understanding

Charter
Savings Bank

بنك الإمارات دبي الوطني
Emirates NBD

GB BANK

Hampden & Co.
BANKERS

HTB

Monmouthshire
Building Society

OakNorth

Recognise
Bank

Santander
International

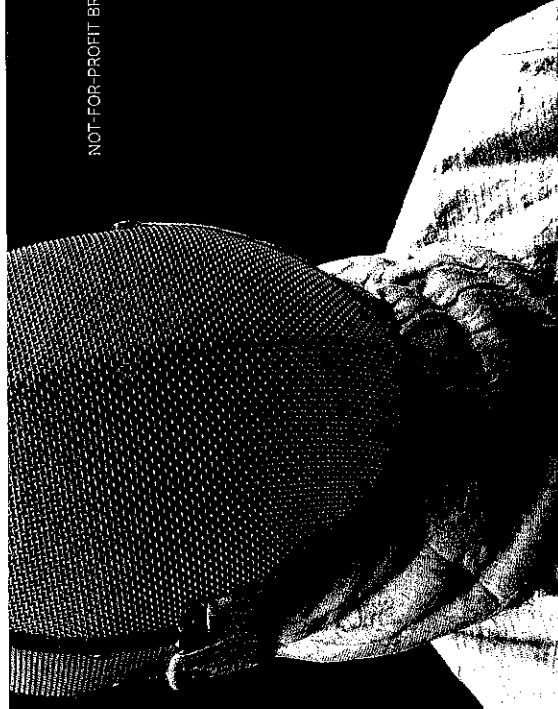
SBI UK

Teachers
Building Society

THE CAMBRIDGE
Building Society

UNITED TRUST BANK

How we keep you protected (and support risk management)



FCA authorised

Insignis is authorised and regulated by the Financial Conduct Authority (FCA) for the provision of payment services.

As a Payment Initiation Service Provider (PISP) we can only initiate payments from your nominated account under explicit instruction from an authorised representative such as a director or signatory.

As an Account Information Service Provider (AISP) we can access and consolidate financial data from your various savings accounts, with your consent, to provide a comprehensive view of your cash holdings.

Security

Dual authorisation adds an extra layer of security by requiring two approvals for transactions, reducing the risk of fraud and errors. This control helps organisations strengthen oversight and ensure compliance with internal financial policies.

Beneficial ownership

Funds are held in your organisation's name and can only be transferred from and to your linked account. Insignis acts as a trustee under a bare trust structure which means that you retain full beneficial ownership of your deposits and any interest earned at all times.

What our members say about us

EDUCATION

CHARITIES

CREDIT UNIONS

"Before Insignis we spent a great deal of time filling in endless forms, getting together the right signatories, and researching where to place our funds, during which time the markets might well have moved. Signing up with Insignis has removed all of that, and we are now able to place funds in a matter of minutes, with no additional forms to complete. We have access to the best rates and choose only from institutions that meet our investment policy."

Lisa Hughes
COO
The River Learning Trust

"The Insignis platform was easy to set up and is simple to use. It reduces risk by providing opportunity to spread funds over multiple FSCS protected banks, without the need to go through time-consuming account opening processes for each bank. There are a lot of banks available offering easy access, notice, and fixed term products helping us to maximise the rate of interest, meaning more money going back into teaching and learning."

Mike Hobbs
Finance Director
St Thomas Aquinas Catholic Multi Academy Trust

"Opening an account with Insignis was simple and straightforward! The platform is easy to operate. I now have the latest bank rates at hand and have increased my FSCS protection! I would highly recommend Insignis to anyone in the education sector looking for a simple way to access and manage a range of bank accounts without the hassle of visiting multiple banks and filling in endless forms."

Kathryn Pillar
Bursar
Twyford School

What our members say about us

EDUCATION

CHARITIES

CREDIT UNIONS

"Helpful Hounds Assistance Dogs was delighted with the service and terms that we received from Insignis when setting up our savings accounts. The personal help and information we received when making our choice of providers was invaluable. Added to that, the method of applying for accounts using a single form, together with the ease of transferring the money made the whole process straightforward."

Peter Rufus
CEO
Helpful Hounds Assistance Dogs

"From the moment we were in touch with Insignis, the process was made easy from start to finish, and the platform is very user friendly. Insignis employees are on hand and very approachable to talk you through the process and answer any queries in a timely manner."

Anne Hardaker
Head of Finance
Harrogate Neighbours Housing Association Ltd.

"We were holding large cash reserves and, rather than open lots of separate bank accounts, our auditors recommended using a cash platform. From our initial enquiry to day-to-day use, we have found Insignis to be helpful and attentive. The platform is straightforward to use and any queries we have are answered quickly and professionally. We are delighted to be using Insignis and have no hesitation to recommend them to other charities."

Gavin Black
Head of Finance
Scottish Sports Future

What our members say about us

EDUCATION

CHARITIES

CREDIT UNIONS

"I looked at several cash management platforms before settling on Insignis. It was clear that they were easy to work with, very responsive and had done some research on credit union needs. We can quickly and easily spread our risk, investing our excess funds for maximum return without the hassle of dealing with multiple banks and deposit takers."

Mike Barry
Operations Manager
First Rate Credit Union

"Using Insignis simplifies the whole KYC process when starting a new relationship with a bank. Plus, it gives us access to enhanced rates and to some banks that do not deal directly with credit unions. The platform is simple to use and intuitive."

Steve Allen
CEO
Hillingdon Credit Union

"We find Insignis so easy to work with. As a small credit union, we would spend a disproportionate amount of time seeking the best rates and then having to complete all the paperwork necessary to open accounts. Now our Treasurer can access all the information and once approved by the Board, the investments are straightforward to make."

Jackie Simpson
General Manager
Westcountry Savings and Loans

Key benefits of Insignis

Access to competitive rates

Choose from a wide range of charity savings accounts, with competitive and exclusive interest rates from our extensive panel of banks and building societies.

Risk reduction

Diversify your organisation's cash across multiple deposit-takers to reduce concentration risk and optimise FSCS protection (where eligible).

Multi-currency accounts

Hold deposits in GBP, USD, and EUR to earn interest while reducing foreign exchange costs.

Streamlined reporting

Consolidate all interest earned across your accounts into one clear, easy-to-use report—making tax reporting and compliance simpler.

Personalised support from our UK-based team

Our dedicated client managers are here to support you, from onboarding to managing maturities. Our team will provide reminders when your fixed-term products approach maturity.



NOT-FOR-PROFIT BROCHURE

How our fees work

Fees are calculated daily as a percentage of total deposits held on the platform and are collected monthly in arrears at the end of each month.

There are no setup, administration, or transaction fees, regardless of deposit size. As an intermediary financial service, our fees are exempt from VAT.

The full savings rates offered by our deposit-takers are passed directly to you without deductions.

Platform Fees

From	To	Platform Fee
£250,000	£499,999	0.25%
£500,000	£1,999,999	0.20%
£2,000,000	£9,999,999	0.15%
£10,000,000	No maximum	0.10%

How Insignis became the home of cash savings

Founded by former investment bankers Paul Richards and Giles Hutson, Insignis has helped clients grow cash savings since 2017.

As a founder-owned business, Insignis operates with independence. We work closely with banks and financial partners to deliver value for our clients. With offices in London and Cambridge, Insignis has grown into a dynamic team of specialists passionate about reshaping the savings market.

As we continue to expand, we remain committed to transforming how savings are managed by making them more accessible, more transparent, and easier to oversee.



PAUL RICHARDS

GILES HUTSON

Wealth & Asset Management AWARDS 2025
SHORTLISTED

2025 Wealth & Asset Management Awards
Shortlisted for WealthTech Firm of the Year

fintech AWARDS London

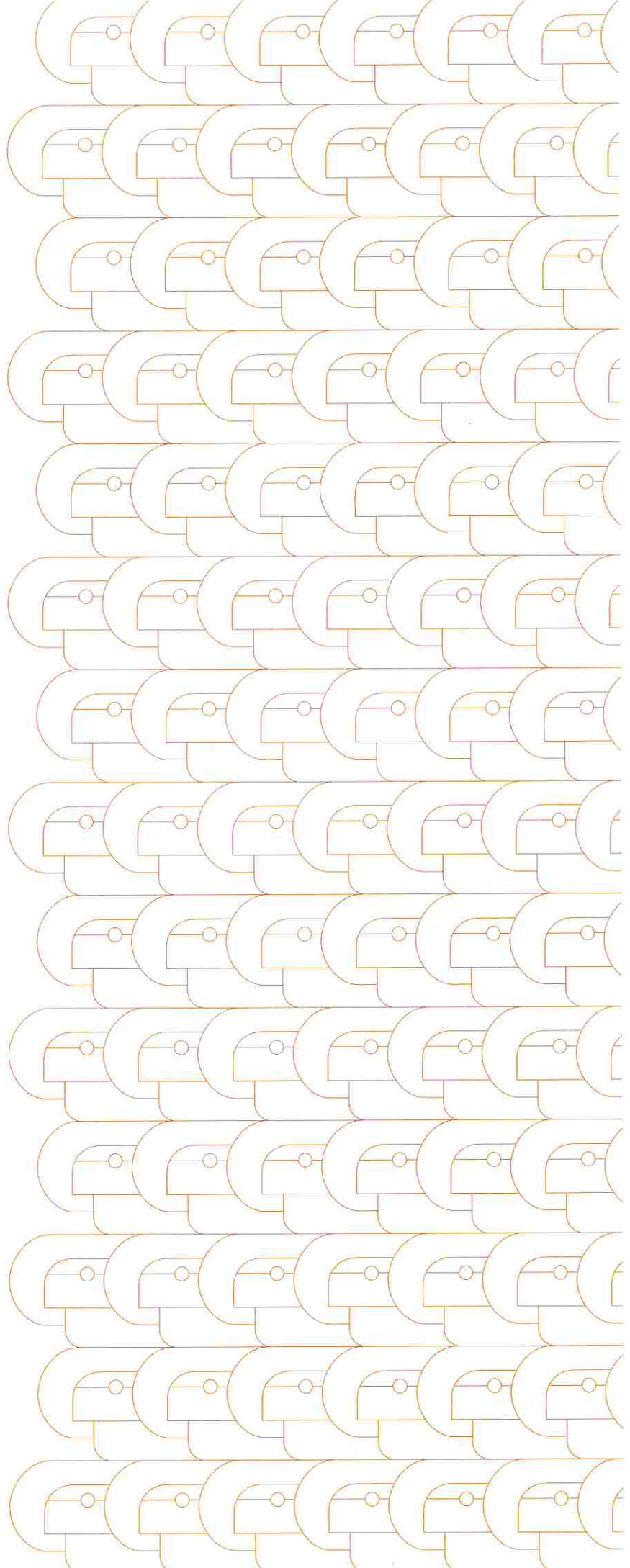
2024 Fintech Awards London
Highly Commended Fintech Company of the Year

PAM AWARDS

2022 Pam Awards
Digital Wealth Proposition

WINNER

2021 Savings Champion
Best Cash Savings Platform



Cranleigh Parish Council

Notice of conclusion of audit

Annual Governance & Accountability Return for the year ended 31 March 2025

Sections 20(2) and 25 of the Local Audit and Accountability Act 2014

Section 16 of the Accounts and Audit Regulations 2015 (SI 2015/234)

	Notes
<p>1. The audit of accounts for Cranleigh Parish Council for the year ended 31 March 2025 has been completed and the accounts have been published.</p>	<p>This notice and Sections 1, 2 & 3 of the AGAR must be published by 30 September. This must include publication on the smaller authority's website. The smaller authority must decide how long to publish the Notice for; the AGAR and external auditor report must be publicly available for 5 years.</p>
<p>2. The Annual Governance & Accountability Return including the auditor's certificate and opinion is available for inspection and copying by any local government elector of the area of Cranleigh Parish Council on application to:</p> <p>(a) <u>MRS B.M. BELL PARISH CLERK</u> <u>CRANLEIGH PARISH COUNCIL</u> <u>COUNCIL OFFICE VILLAGE WAY</u> <u>CRANLEIGH SURREY GU6 8AF</u></p> <p>(b) <u>MONDAY TO FRIDAY</u> <u>9.30AM - 12.30PM</u></p>	<p>(a) Insert the name, position and address of the person to whom local government electors should apply to inspect the AGAR</p> <p>(b) Insert the hours during which inspection rights may be exercised</p>
<p>3. Copies will be provided to any local government elector of the area on payment of <u>£0.30</u>(c) for each copy of the Annual Governance & Accountability Return.</p>	<p>(c) Insert a reasonable sum for copying costs</p>
<p>Announcement made by: (d) <u>MRS B.M. BELL - PARISH CLERK</u></p>	<p>(d) Insert the name and position of person placing the notice</p>
<p>Date of announcement: (e) <u>30/07/25</u></p>	<p>(e) Insert the date of placing of the notice</p>

Section 1 – Annual Governance Statement 2024/25

We acknowledge as the members of:

CRANLEIGH PARISH COUNCIL

our responsibility for ensuring that there is a sound system of internal control, including arrangements for the preparation of the Accounting Statements. We confirm, to the best of our knowledge and belief, with respect to the Accounting Statements for the year ended 31 March 2025, that:

	Agreed		‘Yes’ means that this authority:
	Yes	No*	
1. We have put in place arrangements for effective financial management during the year, and for the preparation of the accounting statements.	✓		prepared its accounting statements in accordance with the Accounts and Audit Regulations.
2. We maintained an adequate system of internal control including measures designed to prevent and detect fraud and corruption and reviewed its effectiveness.	✓		made proper arrangements and accepted responsibility for safeguarding the public money and resources in its charge.
3. We took all reasonable steps to assure ourselves that there are no matters of actual or potential non-compliance with laws, regulations and Proper Practices that could have a significant financial effect on the ability of this authority to conduct its business or manage its finances.	✓		has only done what it has the legal power to do and has complied with Proper Practices in doing so.
4. We provided proper opportunity during the year for the exercise of electors’ rights in accordance with the requirements of the Accounts and Audit Regulations.	✓		during the year gave all persons interested the opportunity to inspect and ask questions about this authority’s accounts.
5. We carried out an assessment of the risks facing this authority and took appropriate steps to manage those risks, including the introduction of internal controls and/or external insurance cover where required.	✓		considered and documented the financial and other risks it faces and dealt with them properly.
6. We maintained throughout the year an adequate and effective system of internal audit of the accounting records and control systems.	✓		arranged for a competent person, independent of the financial controls and procedures, to give an objective view on whether internal controls meet the needs of this smaller authority.
7. We took appropriate action on all matters raised in reports from internal and external audit.	✓		responded to matters brought to its attention by internal and external audit.
8. We considered whether any litigation, liabilities or commitments, events or transactions, occurring either during or after the year-end, have a financial impact on this authority and, where appropriate, have included them in the accounting statements.	✓		disclosed everything it should have about its business activity during the year including events taking place after the year end if relevant.
9. (For local councils only) Trust funds including charitable. In our capacity as the sole managing trustee we discharged our accountability responsibilities for the fund(s)/assets, including financial reporting and, if required, independent examination or audit.	Yes	No	N/A
	✓		has met all of its responsibilities where, as a body corporate, it is a sole managing trustee of a local trust or trusts.

*Please provide explanations to the external auditor on a separate sheet for each ‘No’ response and describe how the authority will address the weaknesses identified. These sheets must be published with the Annual Governance Statement.

This Annual Governance Statement was approved at a meeting of the authority on:

15/05/2025

and recorded as minute reference:

14/7

Signed by the Chair and Clerk of the meeting where approval was given:

Chair

Clerk

www.cranleigh-pc.gov.uk

Section 2 – Accounting Statements 2024/25 for

CRANLEIGH PARISH COUNCIL

	Year ending		Notes and guidance
	31 March 2024 £	31 March 2025 £	
1. Balances brought forward	550,072	490,429	Total balances and reserves at the beginning of the year as recorded in the financial records. Value must agree to Box 7 of previous year.
2. (+) Precept or Rates and Levies	487,004	539,388	Total amount of precept (or for IDBs rates and levies) received or receivable in the year. Exclude any grants received.
3. (+) Total other receipts	167,174	516,058	Total income or receipts as recorded in the cashbook less the precept or rates/levies received (line 2). Include any grants received.
4. (-) Staff costs	251,328	275,760	Total expenditure or payments made to and on behalf of all employees. Include gross salaries and wages, employers NI contributions, employers pension contributions, gratuities and severance payments.
5. (-) Loan interest/capital repayments	0	0	Total expenditure or payments of capital and interest made during the year on the authority's borrowings (if any).
6. (-) All other payments	462,493	875,908	Total expenditure or payments as recorded in the cashbook less staff costs (line 4) and loan interest/capital repayments (line 5).
7. (=) Balances carried forward	490,429	394,207	Total balances and reserves at the end of the year. Must equal (1+2+3) - (4+5+6).

8. Total value of cash and short term investments	496,077	376,690	The sum of all current and deposit bank accounts, cash holdings and short term investments held as at 31 March – To agree with bank reconciliation.
9. Total fixed assets plus long term investments and assets	2,337,488	2,721,676	The value of all the property the authority owns – it is made up of all its fixed assets and long term investments as at 31 March.
10. Total borrowings	0	0	The outstanding capital balance as at 31 March of all loans from third parties (including PWLB).

For Local Councils Only	Yes	No	N/A	
11a. Disclosure note re Trust funds (including charitable)	✓			The Council, as a body corporate, acts as sole trustee and is responsible for managing Trust funds or assets.
11b. Disclosure note re Trust funds (including charitable)	✓			The figures in the accounting statements above exclude any Trust transactions.

I certify that for the year ended 31 March 2025 the Accounting Statements in this Annual Governance and Accountability Return have been prepared on either a receipts and payments or income and expenditure basis following the guidance in Governance and Accountability for Smaller Authorities – a Practitioners' Guide to Proper Practices and present fairly the financial position of this authority.

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

Date

15/05/2025

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

15/05/2025

as recorded in minute reference:

14/8

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

Section 3 – External Auditor’s Report and Certificate 2024/25

In respect of **Cranleigh Parish Council – SU0025**

1 Respective responsibilities of the auditor and the authority

Our responsibility as auditors to complete a **limited assurance review** is set out by the National Audit Office (NAO). A limited assurance review is **not a full statutory audit**, it does not constitute an audit carried out in accordance with International Standards on Auditing (UK & Ireland) and hence it **does not** provide the same level of assurance that such an audit would. The UK Government has determined that a lower level of assurance than that provided by a full statutory audit is appropriate for those local public bodies with the lowest levels of spending.

Under a limited assurance review, the auditor is responsible for reviewing Sections 1 and 2 of the Annual Governance and Accountability Return in accordance with NAO Auditor Guidance Note 02 (AGN 02) as issued by the NAO on behalf of the Comptroller and Auditor General. AGN 02 is available from the NAO website – <https://www.nao.org.uk/code-audit-practice/guidance-and-information-for-auditors/>

This authority is responsible for ensuring that its financial management is adequate and effective and that it has a sound system of internal control. The authority prepares an Annual Governance and Accountability Return in accordance with *Proper Practices* which:

- summarises the accounting records for the year ended 31 March 2025; and
- confirms and provides assurance on those matters that are relevant to our duties and responsibilities as external auditors.

2 External auditor’s limited assurance opinion 2024/25

On the basis of our review of Sections 1 and 2 of the Annual Governance and Accountability Return (AGAR), in our opinion the information in Sections 1 and 2 of the AGAR is in accordance with Proper Practices and no other matters have come to our attention giving cause for concern that relevant legislation and regulatory requirements have not been met.

Other matters not affecting our opinion which we draw to the attention of the authority:

None

3 External auditor certificate 2024/25

We certify that we have completed our review of Sections 1 and 2 of the Annual Governance and Accountability Return, and discharged our responsibilities under the Local Audit and Accountability Act 2014, for the year ended 31 March 2025.

External Auditor Name

PKF LITTLEJOHN LLP

External Auditor Signature

PKF Littlejohn LLP

Date

25/07/2025

Neighbourhood CIL							
Date	Amount	Received*	Spend By	Spent	Date	Balance	
01/04/20 - 30/09/20	£1,970.27	10/05/2021	31/03/2026	£1,485.00	20/08/2024	£485.27	
				£485.27	22/04/2025	£0.00	
01/10/20 - 31/03/21	£16,907.44	23/04/2021	31/03/2026	£144.73	22/04/2025	£16,762.71	
				£1,176.00	16/06/2025	£15,586.71	
01/04/21 - 30/09/21	£26,002.58	08/11/2021	30/09/2026				
01/10/21 - 31/03/22	£345.28	09/05/2022	31/03/2027				
01/04/22 - 30/09/22	£12,031.40	24/10/2022	30/09/2027				
01/10/22 - 31/03/23	£10,480.50	20/04/2023	31/03/2028				
01/04/23 - 30/09/23	£10,639.71	27/10/2023	30/09/2028				
01/10/23 - 31/03/24	£0.00						
01/04/24 - 30/09/24	£68.07	30/10/2024	30/09/2029				
01/10/24 - 31/03/25	£21,894.77						
	£100,340.02						

CRANLEIGH PARISH COUNCIL FINANCIAL REGULATIONS

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These Financial Regulations were adopted by the council at its meeting held on 18 September 2025.

1. General

- 1.1. These Financial Regulations govern the financial management of the council and may only be amended or varied by resolution of the council. They are one of the council's governing documents and shall be observed in conjunction with the council's Standing Orders.
- 1.2. Councillors are expected to follow these regulations and not to entice employees to breach them. Failure to follow these regulations brings the office of councillor into disrepute.
- 1.3. Wilful breach of these regulations by an employee may result in disciplinary proceedings.
- 1.4. In these Financial Regulations:
 - 'Accounts and Audit Regulations' means the regulations issued under Sections 32, 43(2) and 46 of the Local Audit and Accountability Act 2014, or any superseding legislation, and then in force, unless otherwise specified.
 - "Approve" refers to an online action, allowing an electronic transaction to take place.
 - "Authorise" refers to a decision by the council, or a committee or an officer, to allow something to happen.
 - 'Proper practices' means those set out in *The Practitioners' Guide*
 - *Practitioners' Guide* refers to the guide issued by the Joint Panel on Accountability and Governance (JPAG) and published by NALC in England or Governance and Accountability for Local Councils in Wales – A Practitioners Guide jointly published by One Voice Wales and the Society of Local Council Clerks in Wales.
 - 'Must' and **bold text** refer to a statutory obligation the council cannot change.
 - 'Shall' refers to a non-statutory instruction by the council to its members and staff.
- 1.5. The Responsible Financial Officer (RFO) holds a statutory office, appointed by the council. The Clerk has been appointed as RFO and these regulations apply accordingly. The Clerk/RFO;
 - acts under the policy direction of the council;
 - administers the council's financial affairs in accordance with all Acts, Regulations and proper practices;
 - determines on behalf of the council its accounting records and control systems;
 - ensures the accounting control systems are observed;
 - ensures the accounting records are kept up to date;
 - seeks economy, efficiency and effectiveness in the use of council resources; and
 - produces financial management information as required by the council.

1.6. The council must not delegate any decision regarding:

- **setting the final budget or the precept (council tax requirement);**
- **the outcome of a review of the effectiveness of its internal controls**
- **approving accounting statements;**
- **approving an annual governance statement;**
- **borrowing;**
- **declaring eligibility for the General Power of Competence; and**
- **addressing recommendations from the internal or external auditors**

1.7. In addition, the council shall:

- **determine and regularly review the bank mandate for all council bank accounts;**
- **authorise any grant or single commitment in excess of £5,000; and**

2. Risk management and internal control

2.1. The council must ensure that it has a sound system of internal control, which delivers effective financial, operational and risk management.

2.2. The Clerk shall prepare, for approval by the council, a risk management policy covering all activities of the council. This policy and consequential risk management arrangements shall be reviewed by the council at least annually.

2.3. When considering any new activity, the Clerk shall prepare a draft risk assessment including risk management proposals for consideration by the council.

2.4. At least once a year, the council must review the effectiveness of its system of internal control, before approving the Annual Governance Statement.

2.5. The accounting control systems determined by the RFO must include measures to:

- **ensure that risk is appropriately managed;**
- **ensure the prompt, accurate recording of financial transactions;**
- **prevent and detect inaccuracy or fraud; and**
- **allow the reconstitution of any lost records;**
- **identify the duties of officers dealing with transactions and**
- **ensure division of responsibilities.**

2.6. At least once a month, and at each financial year end, a member other than the Chair or a cheque signatory shall be appointed to verify bank reconciliations (for all accounts) produced by the RFO. The member shall sign and date the reconciliations and the original bank statements (or similar document) as evidence of this. This activity, including any exceptions, shall be reported to and noted by the council.

- 2.7. Regular back-up copies shall be made of the records on any council computer and stored either online or in a separate location from the computer. The council shall put measures in place to ensure that the ability to access any council computer is not lost if an employee leaves or is incapacitated for any reason.

3. Accounts and audit

- 3.1. All accounting procedures and financial records of the council shall be determined by the RFO in accordance with the Accounts and Audit Regulations.
- 3.2. **The accounting records determined by the RFO must be sufficient to explain the council's transactions and to disclose its financial position with reasonably accuracy at any time. In particular, they must contain:**
- **day-to-day entries of all sums of money received and expended by the council and the matters to which they relate;**
 - **a record of the assets and liabilities of the council;**
- 3.3. The accounting records shall be designed to facilitate the efficient preparation of the accounting statements in the Annual Governance and Accountability Return.
- 3.4. The RFO shall complete and certify the annual Accounting Statements of the council contained in the Annual Governance and Accountability Return in accordance with proper practices, as soon as practicable after the end of the financial year. Having certified the Accounting Statements, the RFO shall submit them (with any related documents) to the council, within the timescales required by the Accounts and Audit Regulations.
- 3.5. **The council must ensure that there is an adequate and effective system of internal audit of its accounting records and internal control system in accordance with proper practices.**
- 3.6. **Any officer or member of the council must make available such documents and records as the internal or external auditor consider necessary for the purpose of the audit** and shall, as directed by the council, supply the RFO, internal auditor, or external auditor with such information and explanation as the council considers necessary.
- 3.7. The internal auditor shall be appointed by the council and shall carry out their work to evaluate the effectiveness of the council's risk management, control and governance processes in accordance with proper practices specified in the Practitioners' Guide.
- 3.8. The council shall ensure that the internal auditor:
- is competent and independent of the financial operations of the council;
 - reports to council in writing, or in person, on a regular basis with a minimum of one written report during each financial year;
 - can demonstrate competence, objectivity and independence, free from any actual or perceived conflicts of interest, including those arising from family relationships; and

- has no involvement in the management or control of the council

3.9. Internal or external auditors may not under any circumstances:

- perform any operational duties for the council;
- initiate or approve accounting transactions;
- provide financial, legal or other advice including in relation to any future transactions; or
- direct the activities of any council employee, except to the extent that such employees have been appropriately assigned to assist the internal auditor.

3.10. For the avoidance of doubt, in relation to internal audit the terms 'independent' and 'independence' shall have the same meaning as described in The Practitioners Guide.

3.11. The RFO shall make arrangements for the exercise of electors' rights in relation to the accounts, including the opportunity to inspect the accounts, books, and vouchers and display or publish any notices and documents required by the Local Audit and Accountability Act 2014, or any superseding legislation, and the Accounts and Audit Regulations.

3.12. The RFO shall, without undue delay, bring to the attention of all councillors any correspondence or report from internal or external auditors.

4. Budget and precept

4.1. **Before setting a precept, the council must calculate its council tax requirement for each financial year by preparing and approving a budget, in accordance with The Local Government Finance Act 1992 or succeeding legislation.**

4.2. Budgets for salaries and wages, including employer contributions shall be reviewed by the council at least annually in October for the following financial year and the final version shall be evidenced by a hard copy schedule signed by the Clerk and the Chair of the Council. The RFO will inform committees of any salary implications before they consider their draft their budgets.

4.3. No later than October each year, the RFO shall prepare a draft budget with detailed estimates of all income and expenditure for the following financial year along with a forecast for the following three financial years, taking account of the lifespan of assets and cost implications of repair or replacement.

4.4. Unspent budgets for completed projects shall not be carried forward to a subsequent year. Unspent funds for partially completed projects may only be carried forward (by placing them in an earmarked reserve) with the formal approval of the full council.

4.5. Each committee shall review its draft budget and submit any proposed amendments to the council not later than the end of November each year.

- 4.6. The draft budget with any committee proposals and three-year forecast, including any recommendations for the use or accumulation of reserves, shall be considered by the council.
- 4.7. Having considered the proposed budget and three-year forecast, the council shall determine its council tax requirement by setting a budget. The council shall set a precept for this amount no later than the end of January for the ensuing financial year.
- 4.8. **Any member with council tax unpaid for more than two months is prohibited from voting on the budget or precept by Section 106 of the Local Government Finance Act 1992 and must disclose at the start of the meeting that Section 106 applies to them.**
- 4.9. The RFO shall **issue the precept to the billing authority no later than the end of February** and supply each member with a copy of the agreed annual budget.
- 4.10. The agreed budget provides a basis for monitoring progress during the year by comparing actual spending and income against what was planned.
- 4.11. Any addition to, or withdrawal from, any earmarked reserve shall be agreed by the council.

5. Procurement

- 5.1. **Members and officers are responsible for obtaining value for money at all times.** Any officer procuring goods, services or works should ensure, as far as practicable, that the best available terms are obtained, usually by obtaining prices from several suppliers.
- 5.2. The RFO should verify the lawful nature of any proposed purchase before it is made and in the case of new or infrequent purchases, should ensure that the legal power being used is reported to the meeting at which the order is authorised and also recorded in the minutes.
- 5.3. Every contract shall comply with the council's Standing Orders and these Financial Regulations and no exceptions shall be made, except in an emergency.
- 5.4. **For a contract for the supply of goods, services or works where the estimated value will exceed the thresholds set by Parliament, the full requirements of The Procurement Act 2023 and The Procurement Regulations 2024 or any superseding legislation ("the Legislation"), must be followed in respect of the tendering, award and notification of that contract.**
- 5.5. Where the estimated value is below the Government threshold, the council shall (with the exception of items listed in paragraph 5.12) obtain prices as follows:
- 5.6. For contracts estimated to exceed £30,000 including VAT, the Clerk shall advertise an open invitation for tenders in compliance with any relevant provisions of the Legislation. Tenders shall be invited in accordance with Appendix 1.

- 5.7. **For contracts estimated to be over £30,000 including VAT, the council must comply with any requirements of the Legislation regarding the publication of invitations and notices.**
- 5.8. For contracts greater than £3,000 excluding VAT the Clerk shall seek at least 3 fixed-price quotes;
- 5.9. where the value is between £500 and £3,000 excluding VAT, the Clerk shall try to obtain 3 estimates which might include evidence of online prices, or recent prices from regular suppliers.
- 5.10. For smaller purchases, the clerk shall seek to achieve value for money.
- 5.11. **Contracts must not be split to avoid compliance with these rules.**
- 5.12. The requirement to obtain competitive prices in these regulations need not apply to contracts that relate to items (i) to (iv) below:
- i. specialist services, such as legal professionals acting in disputes;
 - ii. repairs to, or parts for, existing machinery or equipment;
 - iii. works, goods or services that constitute an extension of an existing contract;
 - iv. goods or services that are only available from one supplier or are sold at a fixed price.
 - ~~v. The Council will have access to a list of pre-approved contractors (preferred suppliers) which can be used to supply routine services or can be contacted to provide essential maintenance and servicing or emergency services.~~
- 5.13. When applications are made to waive this financial regulation to enable a price to be negotiated without competition, the reason should be set out in a recommendation to the council. Avoidance of competition is not a valid reason.
- 5.14. The council shall not be obliged to accept the lowest or any tender, quote or estimate.
- 5.15. Individual purchases within an agreed budget for that type of expenditure may be authorised by:
- the Clerk, under delegated authority, for any items below £5,000 excluding VAT.
 - the council for all items over £5,000;
- Such authorisation must be supported by a minute (in the case of council or committee decisions) or other auditable evidence trail.
- 5.16. No individual member, or informal group of members may issue an official order or make any contract on behalf of the council.
- 5.17. No expenditure may be authorised that will exceed the budget for that type of expenditure other than by resolution of the council except in an emergency.
- 5.18. In cases of serious risk to the delivery of council services or to public safety on council premises, the clerk may authorise expenditure of up to £5,000 excluding VAT on repair, replacement or other work that in their judgement is necessary, whether or not there is any budget for such expenditure. The Clerk shall report such

action to the Chair as soon as possible and to the council as soon as practicable thereafter.

- 5.19. No expenditure shall be authorised, no contract entered into or tender accepted in relation to any major project, unless the council is satisfied that the necessary funds are available and that where a loan is required, Government borrowing approval has been obtained first.
- 5.20. An official order or letter shall be issued for all work, goods and services a formal contract is to be prepared or an official order would be inappropriate. Copies of orders shall be retained, along with evidence of receipt of goods.
- 5.21. Any ordering system can be misused and access to them shall be controlled by the Clerk.

6. Banking and payments

- 6.1. The council's banking arrangements, including the bank mandate, shall be made by the RFO and authorised by the council; banking arrangements shall not be delegated to a committee. The council has resolved to bank with Lloyds and CCLA. The arrangements shall be reviewed annually for security and efficiency.
- 6.2. The council must have safe and efficient arrangements for making payments, to safeguard against the possibility of fraud or error. Wherever possible, more than one person should be involved in any payment, for example by dual online authorisation or dual cheque signing. Even where a purchase has been authorised, the payment must also be authorised and only authorised payments shall be approved or signed to allow the funds to leave the council's bank.
- 6.3. All invoices for payment should be examined for arithmetical accuracy, analysed to the appropriate expenditure heading and verified to confirm that the work, goods or services were received, checked and represent expenditure previously authorised by the council before being certified by the RFO. Where the certification of invoices is done as a batch, this shall include a statement by the RFO that all invoices listed have been 'examined, verified and certified' by the RFO.
- 6.4. Personal payments (including salaries, wages, expenses and any payment made in relation to the termination of employment) may be summarised to avoid disclosing any personal information.
- 6.5. All payments shall be made by online banking, in accordance with a resolution of the council, unless the council resolves to use a different payment method.
- 6.6. For each financial year the RFO may draw up a schedule of regular payments due in relation to a continuing contract or obligation (such as Salaries, PAYE, National Insurance, pension contributions, rent, rates, regular maintenance contracts and similar items), which the council may authorise in advance for the year.
- 6.7. A copy of this schedule of regular payments shall be signed by two members on each and every occasion when payment is made - to reduce the risk of duplicate payments.

6.8. The Clerk/RFO shall have delegated authority to authorise payments only in the following circumstances:

- i. any payments of up to £5,000 excluding VAT, within an agreed budget.
- ii. payments of up to £5,000 excluding VAT in cases of serious risk to the delivery of council services or to public safety on council premises.
- iii. any payment necessary to avoid a charge under the Late Payment of Commercial Debts (Interest) Act 1998 or to comply with contractual terms, where the due date for payment is before the next scheduled meeting of the council, where the Clerk certify that there is no dispute or other reason to delay payment, provided that a list of such payments shall be submitted to the next appropriate meeting of council.
- iv. Fund transfers within the councils banking arrangements up to the sum of £10,000, provided that a list of such payments shall be submitted to the next appropriate meeting of council.

6.9. The RFO shall present a schedule of payments requiring authorisation, forming part of the agenda for the meeting, together with the relevant invoices, to the council. The council shall review the schedule for compliance and, having satisfied itself, shall authorise payment by resolution. The authorised schedule shall be initialled immediately below the last item by the person chairing the meeting. A detailed list of all payments shall be disclosed within or as an attachment to the minutes of that meeting.

7. Electronic payments

- 7.1. Where internet banking arrangements are made with any bank, the RFO shall be appointed as the Service Administrator. The bank mandate agreed by the council shall identify six councillors who will be authorised to approve transactions on those accounts and a minimum of two people will be involved in any online approval process. The Clerk may be an authorised signatory, but no signatory should be involved in approving any payment to themselves.
- 7.2. All authorised signatories shall have access to view the council's bank accounts online.
- 7.3. No employee or councillor shall disclose any PIN or password, relevant to the council or its banking, to anyone not authorised in writing by the council or a duly delegated committee.
- 7.4. The Service Administrator shall set up all items due for payment online. A list of payments for approval, together with copies of the relevant invoices, shall be made available to two authorised signatories.
- 7.5. In the prolonged absence of the Service Administrator an authorised signatory shall set up any payments due before the return of the Service Administrator.
- 7.6. Two councillors who are authorised signatories shall check the payment details against the invoices before approving each payment using the online banking system.

- 7.7. Evidence shall be retained showing which members approved the payment online and a printout of the transaction confirming that the payment has been made shall be appended to the invoice for audit purposes.
- 7.8. A full list of all payments made in a month shall be provided to the next council meeting and appended to the minutes.
- 7.9. With the approval of the council in each case, regular payments (such as gas, electricity, telephone, broadband, water, National Non-Domestic Rates, refuse collection, pension contributions and HMRC payments) may be made by variable direct debit, provided that the instructions are signed by two authorised members. The approval of the use of each variable direct debit shall be reviewed by the council at least every two years.
- 7.10. Payment may be made by BACS or CHAPS by resolution of the council provided that each payment is approved online by two authorised bank signatories, evidence is retained and any payments are reported to the council at the next meeting. The approval of the use of BACS or CHAPS shall be renewed by resolution of the council at least every two years.
- 7.11. If thought appropriate by the council, regular payments of fixed sums may be made by banker's standing order, provided that the instructions are signed by two members, evidence of this is retained and any payments are reported to council when made. The approval of the use of a banker's standing order shall be reviewed by the council at least every two years.
- 7.12. Account details for suppliers may only be changed upon written notification by the supplier verified by two of the Clerk and a member. This is a potential area for fraud and the individuals involved should ensure that any change is genuine. Data held should be checked with suppliers every two years.
- 7.13. Members and officers shall ensure that any computer used for the council's financial business has adequate security, with anti-virus, anti-spyware and firewall software installed and regularly updated.
- 7.14. Remembered password facilities should not be used on any computer used for council banking.

8. Cheque payments

- 8.1. Cheques or orders for payment in accordance in accordance with a resolution or delegated decision shall be signed by two members and countersigned by the Clerk.
- 8.2. A signatory having a family or business relationship with the beneficiary of a payment shall not, under normal circumstances, be a signatory to that payment.
- 8.3. To indicate agreement of the details on the cheque with the counterfoil and the invoice or similar documentation, the signatories shall also initial the cheque counterfoil and invoice.

8.4. Cheques or orders for payment shall not normally be presented for signature other than at, or immediately before or after a council. Any signatures obtained away from council meetings shall be reported to the council at the next convenient meeting.

9. Payment cards

~~9.1. Any Debit Card issued for use will be specifically restricted to [the Clerk and the RFO] and will also be restricted to a single transaction maximum value of [£500] unless authorised by council or finance committee in writing before any order is placed.~~

~~9.2. A pre-paid debit card may be issued to employees with varying limits. These limits will be set by [the council]. Transactions and purchases made will be reported to [the council] and authority for topping-up shall be at the discretion of [the council].~~

~~9.3. Any corporate credit card or trade card account opened by the council will be specifically restricted to use by the Clerk {and RFO} {specify other officers} and any balance shall be paid in full each month.~~

9.4. Personal credit or debit cards of members or staff shall not be used except for expenses of up to £500 including VAT, incurred in accordance with council policy.

10. Petty Cash

10.1. All cash received must be banked intact. The RFO shall maintain a petty cash float of £250 and may provide petty cash to officers for the purpose of defraying operational and other expenses.

- a) Vouchers for payments made from petty cash shall be kept, along with receipts to substantiate every payment.
- b) Cash income received must not be paid into the petty cash float but must be separately banked, as provided elsewhere in these regulations.
- c) Payments to maintain the petty cash float shall be shown separately on any schedule of payments presented for approval.

11. Payment of salaries and allowances

11.1. As an employer, the council must make arrangements to comply with the statutory requirements of PAYE legislation.

11.2. Councillors allowances (where paid) are also liable to deduction of tax under PAYE rules and must be taxed correctly before payment.

11.3. Salary rates shall be agreed by the council. No changes shall be made to any employee's gross pay, emoluments, or terms and conditions of employment without the prior consent of the council.

11.4. Payment of salaries shall be made, after deduction of tax, national insurance, pension contributions and any similar statutory or discretionary deductions, on the dates stipulated in employment contracts.

11.5. Deductions from salary shall be paid to the relevant bodies within the required timescales, provided that each payment is reported, as set out in these regulations above.

11.6. Each payment to employees of net salary and to the appropriate creditor of the statutory and discretionary deductions shall be recorded in a payroll control account

or other separate confidential record, with the total of such payments each calendar month reported in the cashbook. Payroll reports will be reviewed by two authorised signatories (rotated monthly) approving online payment every month to ensure that the correct payments have been made.

11.7. Any termination payments shall be supported by a report to the council, setting out a clear business case. Termination payments shall only be authorised by the full council.

11.8. Before employing interim staff, the council must consider a full business case.

12. Loans and investments

12.1. Any application for Government approval to borrow money and subsequent arrangements for a loan must be authorised by the full council and recorded in the minutes. All borrowing shall be in the name of the council, after obtaining any necessary approval.

12.2. Any financial arrangement which does not require formal borrowing approval from the Secretary of State (such as Hire Purchase, Leasing of tangible assets or loans to be repaid within the financial year) must be authorised by the full council, following a written report on the value for money of the proposed transaction.

12.3. The council shall consider the requirement for an Investment Strategy and Policy in accordance with Statutory Guidance on Local Government Investments, which must be written in accordance with relevant regulations, proper practices and guidance. Any Strategy and Policy shall be reviewed by the council at least annually.

12.4. All investment of money under the control of the council shall be in the name of the council.

12.5. All investment certificates and other documents relating thereto shall be retained in the custody of the RFO.

12.6. Payments in respect of short term or long-term investments, including transfers between bank accounts held in the same bank, shall be made in accordance with these regulations.

13. Income

13.1. The collection of all sums due to the council shall be the responsibility of and under the supervision of the RFO.

13.2. The council will review all fees and charges for work done, services provided, or goods sold at least annually as part of the budget-setting process, following a report of the Clerk. The RFO shall be responsible for the collection of all amounts due to the council.

13.3. Any sums found to be irrecoverable and any bad debts shall be reported to the council by the RFO and shall be written off in the year. The council's approval shall be shown in the accounting records.

13.4. All sums received on behalf of the council shall be deposited intact with the council's bankers, with such frequency as the RFO considers necessary. The origin of each receipt shall clearly be recorded on the paying-in slip or other record.

13.5. Personal cheques shall not be cashed out of money held on behalf of the council.

13.6. The RFO shall ensure that VAT is correctly recorded in the council's accounting software and that any VAT Return required is submitted from the software by the due date.

~~13.7. Where significant sums of cash are regularly received by the council, the RFO shall ensure that more than one person is present when the cash is counted in the first instance, that there is a reconciliation to some form of control record such as ticket issues, and that appropriate care is taken for the security and safety of individuals banking such cash.~~

~~13.8. Any income that is the property of a charitable trust shall be paid into a charitable bank account. Instructions for the payment of funds due from the charitable trust to the council (to meet expenditure already incurred by the authority) will be given by the Managing Trustees of the charity meeting separately from any council meeting.~~

14. Payments under contracts for building or other construction works

14.1. Where contracts provide for payment by instalments the RFO shall maintain a record of all such payments, which shall be made within the time specified in the contract based on signed certificates from the architect or other consultant engaged to supervise the works.

14.2. Any variation of, addition to or omission from a contract must be authorised by the Clerk to the contractor in writing, with the council being informed where the final cost is likely to exceed the contract sum by 5% or more, or likely to exceed the budget available.

15. Stores and equipment

15.1. The officer in charge of each section shall be responsible for the care and custody of stores and equipment in that section.

15.2. Delivery notes shall be obtained in respect of all goods received into store or otherwise delivered and goods must be checked as to order and quality at the time delivery is made.

15.3. Stocks shall be kept at the minimum levels consistent with operational requirements.

15.4. The RFO shall be responsible for periodic checks of stocks and stores, at least annually.

16. Assets, properties and estates

16.1. The Clerk shall make arrangements for the safe custody of all title deeds and Land Registry Certificates of properties held by the council.

16.2. The RFO shall ensure that an appropriate and accurate Register of Assets and Investments is kept up to date, with a record of all properties held by the council,

their location, extent, plan, reference, purchase details, nature of the interest, tenancies granted, rents payable and purpose for which held, in accordance with Accounts and Audit Regulations.

16.3. The continued existence of tangible assets shown in the Register shall be verified at least annually, possibly in conjunction with a health and safety inspection of assets.

16.4. No interest in land shall be purchased or otherwise acquired, sold, leased or otherwise disposed of without the authority of the council, together with any other consents required by law. In each case a written report shall be provided to council in respect of valuation and surveyed condition of the property (including matters such as planning permissions and covenants) together with a proper business case (including an adequate level of consultation with the electorate where required by law).

16.5 No tangible moveable property shall be purchased or otherwise acquired, sold, leased or otherwise disposed of, without the authority of the council, together with any other consents required by law, except where the estimated value of any one item does not exceed £2,000. In each case a written report shall be provided to council with a full business case.

17. Insurance

17.1. The RFO shall keep a record of all insurances effected by the council and the property and risks covered, reviewing these annually before the renewal date in conjunction with the council's review of risk management.

17.2. The Clerk shall give prompt notification of all new risks, properties or vehicles which require to be insured and of any alterations affecting existing insurances.

17.3. The RFO shall be notified of any loss, liability, damage or event likely to lead to a claim, and shall report these to the council at the next available meeting. The RFO shall negotiate all claims on the council's insurers.

17.4. All appropriate members and employees of the council shall be included in a suitable form of security or fidelity guarantee insurance which shall cover the maximum risk exposure as determined annually by the council.

18. Charities

18.1. Where the council is sole managing trustee of a charitable body the Clerk/RFO shall ensure that separate accounts are kept of the funds held on charitable trusts and separate financial reports made in such form as shall be appropriate, in accordance with Charity Law and legislation, or as determined by the Charity Commission. The Clerk/RFO shall arrange for any audit or independent examination as may be required by Charity Law or any Governing Document.

19. Suspension and revision of Financial Regulations

19.1. The council shall review these Financial Regulations annually and following any change of clerk or RFO. The Clerk shall monitor changes in legislation or proper practices and advise the council of any need to amend these Financial Regulations.

- 19.2. The council may, by resolution duly notified prior to the relevant meeting of council, suspend any part of these Financial Regulations, provided that reasons for the suspension are recorded and that an assessment of the risks arising has been presented to all members. Suspension does not disapply any legislation or permit the council to act unlawfully.
- 19.3. The council may temporarily amend these Financial Regulations by a duly notified resolution, to cope with periods of absence, local government reorganisation, national restrictions or other exceptional circumstances.

Appendix 1 - Tender process

- 1) Any invitation to tender shall state the general nature of the intended contract and the Clerk shall obtain the necessary technical assistance to prepare a specification in appropriate cases.
- 2) The invitation shall in addition state that tenders must be addressed to the Clerk in the ordinary course of post, unless an electronic tendering process has been agreed by the council.
- 3) Where a postal process is used, each tendering firm shall be supplied with a specifically marked envelope in which the tender is to be sealed and remain sealed until the prescribed date for opening tenders for that contract. All sealed tenders shall be opened at the same time on the prescribed date by the Clerk in the presence of at least one member of council.
- 4) Where an electronic tendering process is used, the council shall use a specific email address that will be monitored to ensure that nobody accesses any tender before the expiry of the deadline for submission.
- 5) Any invitation to tender issued under this regulation shall be subject to Standing Order 18 and shall refer to the terms of the Bribery Act 2010.
- 6) Where the council does not accept any tender, quote or estimate, the work is not allocated and the council requires further pricing, no person shall be permitted to submit a later tender, estimate or quote who was present when the original decision-making process was being undertaken.



GDPR-info
DATA PROTECTION SPECIALISM

Cranleigh Parish Council Data Protection Audit Report



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Introduction

Client

Cranleigh Parish Council is a local government authority serving the community of Cranleigh, Surrey. The Council is responsible for representing the interests of residents, delivering a range of local services, and managing community assets and public spaces. Operating within the framework of statutory duties and good governance, the Council aims to promote the wellbeing of the parish and ensure efficient, transparent, and accountable decision-making. In doing so, it processes personal data in line with its legal responsibilities under the UK General Data Protection Regulation (UK GDPR) and the Data Protection Act 2018, ensuring that all data handling practices are secure, lawful, and proportionate.

GDPR-Info

GDPR-Info Ltd was recently commissioned to undertake a data protection audit for Cranleigh Parish Council. The initial phase involved a gap analysis, based on GDPR-Info Ltd.'s credentials as an experienced provider of professional services in the field of data protection and information security across the public and third sectors. This report presents the findings of that audit and provides an assessment of the Council's current level of compliance with applicable data protection legislation.

GDPR-Info Ltd is not a licensed legal practitioner and, while the recommendations provided in this report are informed by over twenty-five years of practical expertise in data protection and privacy law, they should not be interpreted as formal legal advice.

Executive Summary

Part of this process was to carry out a Risk Assessment (Audit) to determine the levels of compliancy with the current data protection legislation (UK-GDPR & Data Protection Act 2018) & other data related legislation (PECR 2003 / e-privacy etc.) and identify areas of weakness which require addressing & to provide a framework of compliance for the future.

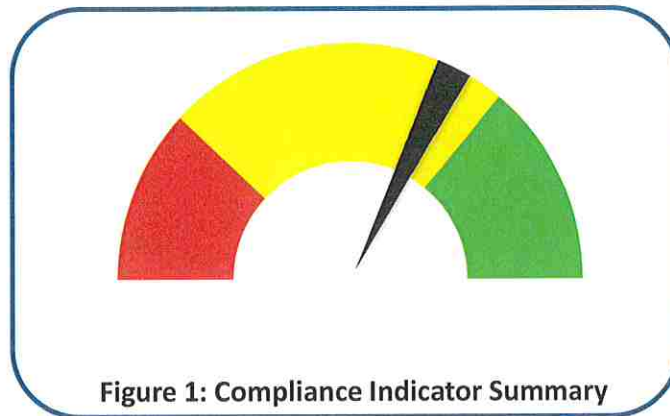
- Ensuring continuing policy documentation is in place and fit-for-purpose.
- Advising on various security matters to protect personal data
- Ensuring adequate training of staff is in place for their level of involvement
- Signposting reputable third-party suppliers where appropriate
- Provide an Audit to ensure continued compliance
- Offer you a helpline during office hours
- Notify you of changes in legislation

It is apparent that Cranleigh Parish Council does have a few issues in the way it handles data privacy & protection; however, once these concerns have been resolved, I feel that it will be **working within the guidelines of the current but ever-changing legislation.**

The general situation is illustrated by Figure 1: (overleaf)

Further on in the report, On each section is a small graphic which represents where we feel the organisation is in terms of IG compliancy, **Red** indicates that you are performing badly whilst **Green** would indicate a good performance in the area.

Data Protection Audit Report
Current Compliance Indicator



The initial 'Questionnaire' tables are a breakdown of the various subsections of current data protection legislation (**for guidance only**) and ease of viewing & compatibility with the various sections and whether these are applicable to the organisation and if there are areas which require looking at further. Denoted by a ☒ (compliant, in progress, not compliant & not applicable).

The comments corresponding to each of these risks in the 'Process Analysis' worksheets, which were completed at the time of the audit indicate any issues that require attention.

Logistics

The Assessment fieldwork was conducted face to face at the clients premises

Interviewees

The following personnel contributed to this assessment:

Name	Job title/role
Beverley Bell	Parish Clerk

GDPR-Info processes limited personal data provided by client staff and representatives for the sole purpose of Reporting on data gathered for this report. this data is not stored anywhere on our systems other than in this report and associated meeting records. it is retained until deletion is possible from both legal and contractual standpoints.

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Caveat

The matters arising in this report are only those that were brought to my attention during the assessment and are not necessarily a comprehensive statement of all areas requiring improvement. GDPR-Info takes all reasonable care to ensure that its gap analysis report is fair and accurate but cannot accept any liability to any person or organisation, including any third party, for any loss or damage suffered or costs incurred by it arising out of or in connection with the use of this report however such loss or damage is caused.

Assessment Scope

The focus of the assessment was **Staff / public data** as processed by Cranleigh Parish Council in the following business functions:

- Document Management
- Human Resources
- Public Data
- Platform
- Website

When auditing data protection compliance in a parish council setting, it is essential to consider the perceived culture within the organisation. Through discussions with the clerk & observations of day-to-day operations, I found that the culture at Cranleigh Parish Council reflects the shared values, beliefs, and norms that influence how senior officers and staff approach their responsibilities under data protection legislation. Understanding this culture—alongside the use of digital & manual systems and information management processes—provides valuable insight into how privacy and information security are prioritised and respected across the organisation.

By assessing the perceived culture, one can gauge the overall awareness of, and commitment to data protection practices among Council members, employees, and volunteers. This includes evaluating how privacy is communicated and embedded in daily workflows, whether data protection responsibilities are clearly defined, and how staff are supported through policies, procedures, and training. An effective data protection culture also involves a sense of accountability—where individuals understand their role, the importance of compliance, and the potential consequences of non-adherence.

Auditing cultural perceptions also includes examining the extent to which staff are engaged in data protection initiatives. It is important to assess whether the Council fosters open communication, encourages the reporting of concerns or breaches, and actively involves staff in the development and continuous improvement of data protection practices. Organisations that empower staff to take ownership of information governance are more likely to maintain resilience in the face of evolving risks and regulatory requirements.

During this audit, I observed a generally positive attitude towards protecting the confidentiality of residents' & employees personal data. This included an understanding of the councils' ethical duty to uphold privacy and a clear sense of respect and trust among colleagues—both of which are vital for maintaining robust information governance. Trust is a

Data Protection Audit Report

foundational component of any privacy-conscious organisation and supports a culture where confidentiality is upheld not only as a legal requirement but as a professional standard.

In summary, evaluating the perceived data protection culture within Cranleigh Parish Council offers a comprehensive view of how privacy is valued and operationalised. By exploring staff awareness, attitudes, and engagement, this audit identifies both strengths and opportunities for improvement. It supports the development of targeted recommendations aimed at strengthening the Council's data protection culture, aligning with legal obligations and the expectations of the public.

Critical Focus Areas

The gap analysis focused on the following ten critical focus areas of data protection legislation compliance

- 1: **Data Protection Governance** – the extent to which data protection accountability, responsibility, policies and procedures, performance measurement controls and reporting mechanisms to monitor compliance are in place and operating throughout the organisation.
2. **Risk management** – is privacy risk included in the risk register? What arrangements are in place for privacy risk management across the organisation? To what extent does the risk regime incorporate information-specific risks? Which risks to the rights and freedoms of natural persons are addressed?
- 3: **Ongoing data protection** – the extent to which an appropriately staffed, funded, and supported area can deliver realistic objectives.
4. **Data Protection Officer (DPO)** – While appointing a DPO is not a statutory requirement for parish councils under the UK GDPR, it is considered good practice to have access to dedicated data protection expertise. This may be through the appointment of a named DPO or by securing external professional support. The key consideration is whether appropriate guidance is available to ensure compliance with data protection obligations. It is also important to ensure the individual has the necessary knowledge, skills, and capacity to fulfil the role effectively in line with current legal and operational requirements.
5. **Roles and responsibilities** – the extent to which roles and responsibilities are defined and established throughout the organisation, including necessary training and awareness.
6. **Scope of compliance** – it is essential that the scope of compliance is clearly defined, taking account of all the data processing in which the organisation has a role, whether as a data controller or as a data processor, as well as any data sharing activities. To determine the scope of compliance, we also must identify all the databases that hold personal data.
7. **Process analysis** – it is essential to identify, for each process that involves personal data, the extent to which each of the data processing principles are established. The lawful basis for processing is a key area of consideration. Are there any processes for which a data protection impact assessment (DPIA) is mandatory, and for which processes might a DPIA help establish data protection by design and data protection by default?

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8. Personal Information Management System (PIMS) – a wide range of documentation is required to ensure that the organisation can demonstrate compliance with the requirements of current data protection legislation. The scale of the documentation should be appropriate to the size and complexity of the organisation. The PIMS should also address staff training and awareness.

9. Information security management system (ISMS) – the technical and organisational measures in place to ensure that there is adequate security of personal data held in hard copy or electronic form or processed through the organisation's systems. This includes a review of methodologies for testing security, and established cyber security certifications, standards and codes of practice.

10. Rights of data subjects – the organisation needs processes that will enable it to both facilitate and respond to data subjects exercising any or all their rights.

Key strengths found:

1. Initial perceptions are important. As a public body handling personal data relating to residents, staff, contractors, and councillors, it was anticipated that the Council would take the protection of physical infrastructure and personal data seriously. This expectation was largely met during early discussions, which demonstrated a foundational awareness of the importance of privacy and data protection across Council operations.
2. Governance and ethical leadership were evident through the approach of senior officers and councillors. There was a clear willingness to support compliance efforts, with an understanding that good governance in Information Governance (IG) and Data Protection requires structure, consistency, and the allocation of appropriate resources to ensure all staff and stakeholders understand their responsibilities.
3. There is a developing understanding of the requirements for compliance with current data protection legislation, including the UK GDPR and the Data Protection Act 2018. Importantly, there was an openness to adapting processes and policies to meet legal standards and embed data protection into day-to-day operations.
4. While appointing a Data Protection Officer (DPO) is not a statutory requirement for parish councils, Cranleigh Parish Council recognised the benefits of commissioning an external, independent audit. The involvement of a specialist advisor brings valuable expertise and impartial insight, helping the Council to benchmark its practices, identify areas for improvement, and enhance its overall data protection posture. This proactive approach supports transparency, builds public trust, and reinforces the Council's commitment to good governance.

Progress required for compliancy: Findings -Things to do!

1. Check recycle bins on the desktops on all PC's & Download & Documents for personal and non-council data & remove / empty regularly – weekly checks if not daily.

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2. Staff Spot checks on awareness of data protection policies and their location.
3. Passwords for PC access – make sure that they are minimum 12 characters.
4. Write & update any DPIA's – *including the Ring Doorbell*
5. Add & Update the Record of Processing Activities (Data Mapping) with additional third parties as discussed – *including Surrey Community Action.*
6. Village Hall Standard Conditions on website – *Section 26* – amend to 'UK-GDPR / Data Protection Act 2018' & remove Data Protection 1998
7. Youth Council Data Protection Policy – amend Data Protection Act 1998 (throughout) to 'UK-GDPR / Data Protection Act 2018' & *Section 6 – How to deal with a SAR* – amend to '30 days & no payment is required'.

Findings (visual)

The results of this gap analysis are set out in the 'Legal Reference Questionnaire', providing a detailed visual assessment of the state of compliance with current data protection legislation.

The project objective should be for most (preferably all) of the cells of the worksheet to contain a green box, illustrating progress towards a compliant position.

The obvious next step is to execute the action plan and remedy, in detail, each of the indicators and risks that are not currently at 'green status'.

Key contextual issues and / or concerns

Data Protection & Privacy is currently driven by the Clerk & her team and from viewing current documentation, various policies are in place to show awareness & compliancy with most of the current legislation. The implementation and maintenance of data protection laws can be a significant shift for many organisations, and it is crucial to involve all areas of the business as it grows exponentially to make sure all the people involved are aware of their responsibilities.

The Council was lacking in the production of few up to date policies required for compliancy plus others recommended by the Information Commissioners Office; all staff should be aware of where these policies are held; how to access them and what procedures should be followed So educating / reminding staff as to know where to look for guidance (policies) should be a priority – is this covered in your 'starter' & ongoing mandatory training?

Transparency is key here, not just with the public, but with staff also.

Barriers to progress

In relation to the current data protection laws (UK-GDPR / Data Protection Act 2018), the organisation should be focused on protecting the personal data of all users where necessary; and be aware of the privacy risks for them.

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Resources

User awareness and training & education is always key to them understanding more often, why the Council has certain policies & procedures as it hones their ability to work better, knowing that personal data is protected and kept confidential in various circumstances.

Action plan: areas for improvement

The reality is that there are some areas that need to be addressed to maintain compliancy with the law; currently this is good. The action plan (see '**things to do** – above') addresses most of the gaps, and the details identified in the attached assessment should also be addressed to provide the highest level of assurance that the Council has done everything that can reasonably be done to navigate, adapt and ensure their compliance with the current legislation.

Conclusion

The current arrangements for governance, risk and control provide good assurance of compliance with current data protection legislation. This analysis has identified some scope for improvement in the existing data protection arrangements to mitigate some minor risks. The identified issues should be addressed at the earliest opportunity by implementing an action plan using the 'Things to do' section of this report as a base.

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Fully Compliant = FC
In Progress = IP
Not Compliant = NC
Not Applicable = N/A

Legal References Compliance Tables

	Audit Question	Ref: UK-GDPR	Status			
Accountability Governance	Do you maintain an overarching data protection policy that demonstrates compliance with requirements including processing, privacy by design and record keeping?	5(2)	FC	IP	NC	NA
	Do you train all employees on legal requirements and principles — including processing activities, controls, privacy impact assessments, audits, data subject rights, reporting lines and privacy by design — and the potential impact of noncompliance?	5(2)	FC	IP	NC	NA
	Do you regularly test, retrain and maintain records of training for employees who handle personal data on their understanding of data protection requirements?	5(2)	FC	IP	NC	NA
	If you require a data protection officer (DPO), does he or she have reporting authority to the highest level of management, necessary resources, independence, and authority to ensure compliance with data protection laws?	7(1) 38(1-4,6)	FC	IP	NC	NA
	Is the DPO bound by secrecy or confidentiality concerning the performance of his or her tasks?	38(5)	FC	IP	NC	NA
	If the DPO has other responsibilities, have they been assessed to avoid conflicts of interest?	38(6)	FC	IP	NC	NA
	Does the DPO have the knowledge and ability to fulfil tasks outlined in Article 39?	37(5)	FC	IP	NC	NA
	Have you shared the DPO's contact information internally, publicly and with the relevant supervisory authority?	37(7)	FC	IP	NC	NA
Process	Do you maintain records management and data retention policies?	24(1,2,3)	FC	IP	NC	NA
	Have you documented principles to justify retention periods?	5(1)	FC	IP	NC	NA
	Is personal data processed lawfully fairly and in a transparent manner?	5(1)	FC	IP	NC	NA
	Is personal data collected for specified, explicit and legitimate purposes, and not further processed in a manner incompatible with those purposes?	5(1)	FC	IP	NC	NA
	Is personal data relevant, limited and minimized to what is necessary in relation to the purposes for which they are processed?	5(1)	FC	IP	NC	NA
	Is personal data accurate and kept up to date — and is every reasonable step taken to ensure inaccurate personal data is erased and rectified without delay?	5(1)	FC	IP	NC	NA
	Is personal data kept only for as long as is necessary for the purposes for which it is processed?	5(1)	FC	IP	NC	NA
	Is personal data processed in a manner that ensures appropriate security of the personal data, including protection against unauthorized or unlawful processing and against accidental loss, destruction or damage, using appropriate technical or organizational measures?	5(1)	FC	IP	NC	NA
	Have you clearly identified, detailed, documented and kept up to date the purpose(s) of processing personal data?	5(1)	FC	IP	NC	NA
	Have you implemented appropriate technical or organizational measures to ensure security of personal data, including protection against unauthorized processing, accidental loss, destruction or damage?	5(1) 24(1,2)	FC	IP	NC	NA

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	If you process special categories of sensitive data (revealing racial or ethnic origin, political opinions, religious or philosophical beliefs, trade union membership, genetic data, biometric data for uniquely identifying a natural person, data concerning health or data concerning a natural person's sex life or sexual orientation), are you in compliance with Article 9(2) conditions?	9(1,2)	FC	IP	NC	NA
	If you process personal data relating to criminal convictions and offenses or related security measures based on Article 6(1), is this carried out under the control of official authority or authorized by union or member state law?	10	FC	IP	NC	NA
Privacy by design and default						
	Do you ensure processes are in place to embed privacy by design and default into projects, to include measures that ensure data minimization, pseudonymization, encryption and the processing of only personal data necessary for specified purposes?	25(1,2) 32(1,4)	FC	IP	NC	NA
	Do you restrict access to personal data to only those employees processing the data?	24 (1)	FC	IP	NC	NA
	Do you frequently audit and test systems and services to ensure ongoing confidentiality, integrity, availability and resilience?	32(1)	FC	IP	NC	NA
	Do you ensure processes and systems can be restored in the event of physical or technical incidents?	32(1,2)	FC	IP	NC	NA
	Do you maintain a process for regularly testing, assessing and evaluating the effectiveness of technical and organisational measures to ensure the security of the processing?	32 (1)	FC	IP	NC	NA
	Do you apply storage and processing methods (e.g., redaction) to hard copies of personal data?	24(1,2) 25(1,2)	FC	IP	NC	NA
	Do you maintain documented data destruction procedures in place for information that is no longer necessary — and do you take steps to ensure employees comply with procedures?	24(1,2) 25(1,2)	FC	IP	NC	NA
DPIAs	Do you carry out a data protection impact assessment (DPIA) whenever the use of new technologies is likely to result in high risk to data subjects, decisions from automated processing have a legal impact, processing involves special categories of data referred to in Article 9(1) or 10, or include large-scale systematic monitoring of publicly accessible areas?	35 (1)	FC	IP	NC	NA
	Is the DPO always involved when carrying out a DPIA?	35(2)	FC	IP	NC	NA
	Does the DPIA contain a systematic description of the envisaged processing operations, the purpose of processing, an assessment of the necessity and proportion of processing in relation to the purposes, an assessment of the risks to rights and freedoms of data subjects, and measures envisaged to address the risks, such as safeguards and security measures?	35(7)	FC	IP	NC	NA
	Where appropriate, do you seek the views of data subjects or their representatives on intended processing?	35(9)	FC	IP	NC	NA
	Do you have a process in place for detecting changes in risks — and do you review DPIAs for changed risks?	35(11)	FC	IP	NC	NA
	Are risks arising from each DPIA mitigated?	36(1,2)	FC	IP	NC	NA

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Records of Processing	When risks cannot be mitigated, do you contact the supervisory authority with a list of controller and processor responsibilities, the purposes and means of intended processing, measures and safeguards provided to protect data subjects, the DPO's contact details, the DPIA and any other requested information?	36(3)	FC	IP	NC	NA
	If you are a controller processing types of data listed in Article 30(5), do you maintain a record of processing activities containing the name and contact details of the controller and DPO, the purpose of processing, a description of data subject and personal data categories, categories of recipients to whom personal data have been or will be disclosed, international transfers of data, time limits for data erasure, and a description of technical and organizational security	30(1,3,5)	FC	IP	NC	NA
	If you are a processor, processing types of data listed in Article 30(5), do you maintain a record of processing activities containing the name and contact details of the processor, controller and DPO; categories of processing carried out on behalf of each controller; international transfers of data; and a description of technical and organisational security measures in place?	30(2,3,5)	FC	IP	NC	NA
	Do you ensure records of processing activities are maintained in writing and available to the supervisory authority on request?	30(3,4)3	FC	IP	NC	NA
Data Subject Rights						
	Where a data subject exercises their right of access, do you ensure they are provided with all items listed in Article 15(1)?	15(1,2,3,4)	FC	IP	NC	NA
	Do you maintain processes for rectifying inaccurate personal data and having incomplete personal data completed?	16	FC	IP	NC	NA
	Where a data subject requests the erasure of personal data, do you take every reasonable step to erase all data, links and copies without undue delay and when Article 17(1) grounds apply?	17(1,2,3)	FC	IP	NC	NA
	Where the accuracy of personal data is contested, do you restrict processing to enable verification of accuracy?	18(1,2)	FC	IP	NC	NA
	Where processing is no longer necessary or lawful, do you have a process for restricting processing when requested by data subjects?	18(1,2)	FC	IP	NC	NA
	Do you ensure data subjects who have obtained restriction of processing are informed before restrictions are lifted?	18(3)	FC	IP	NC	NA
	Do you notify all processors and other personal data recipients of rectifications, erasures and restrictions of processing?	19	FC	IP	NC	NA
	Where a data subject exercises their right to data portability, do you transmit data to another controller without hindrance, by automated means, and in a common and machine-readable	20(1,2)	FC	IP	NC	NA
	Where data subjects object to having their data processed for direct marketing, do you no longer process their data?	21(2,3,4)	FC	IP	NC	NA
	Where data subjects object to having their data processed for research or official purposes, do you no longer process their data unless you can present compelling legitimate	21(1,6)	FC	IP	NC	NA
	Do you ensure data subjects have the right not to be subject to legal or similarly affecting decisions based on automated processing?	22(1,2,3,4)	FC	IP	NC	NA
	Are you able to demonstrate that data subjects have consented to the processing of their data?	7(1)	FC	IP	NC	NA
	Are consent requests clearly distinguishable from other matters, in an intelligible and accessible form, and written in clear and plain language?	7(2)	FC	IP	NC	NA

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N o t i c e s	Are data subjects asked to positively opt-in (separate and unticked opt-in boxes per Recital 32)?	7(1,2)	FC	I P	NC	NA
	Do data subjects have the right to withdraw consent at any time — and is withdrawing consent as easy and giving consent?	7(3)	FC	I P	NC	NA
	Where processing data of subjects below the age of 16 years, is consent given and authorised by the holder of parental responsibility — and are reasonable efforts made to verify this consent?	8(1,2)	FC	I P	NC	NA
	Are privacy notices and policies clearly provided to data subjects with processor and DPO contact information, purposes of processing, legal bases for processing , recipients of personal data, international transfers, data retention periods and data subject rights?	13(1,2) 14(1,2)	FC	I P	NC	NA
	Where personal data is not obtained directly from data subjects, do you provide categories of personal data and the originating sources and whether those are publicly accessible?	14(2)	FC	I P	NC	NA
	Are privacy notices and policies provided to data subjects at the time of collection from data subjects or within one month when not obtained from data subjects?	13(1,2)1 4(3)	FC	I P	NC	NA
	Are privacy notices and policies provided to data subjects prior to further processing when they have not previously been communicated?	13(3,4)- 14(4,5)	FC	I P	NC	NA
	Are all communications with data subjects provided in writing using clear, concise and transparent language?	12(1)	FC	I P	NC	NA
	Where information on action taken on data subject rights (Article 15-22) cannot be provided within one month of receipt, do you inform data subjects of the required extension within one month, include reasons for the delay, and extend delivery no more than two months?	12(3)	FC	I P	NC	NA
	If you do not take action on requests of the data subject, do you inform the data subject of reasons for not taking action, without delay and within one month of receipt, and include possibilities for lodging complaints with a supervisory authority or seeking judicial remedy?	12(4)	FC	I P	NC	NA
B r e a c h m a n a g e m e n t	Are information requests provided free of charge unless demonstrated by the controller to be manifestly unfounded or excessive?	12(5)	FC	I P	NC	NA
	Do you maintain breach incident and notification policies and procedures & Breach Log	24(1,2,3) 33(1,2,3,4)	FC	I P	NC	NA
	Are security measures (e.g., backup, pseudonymisation, encryption, testing) implemented and appropriate for data risks?	32(	FC	I P	NC	NA
	Do you have an up-to-date data breach response plan?	33(1,2,3,	FC	I P	NC	NA
	Do you investigate and take corrective action for all personal data breaches regardless of size or scope?	33(	FC	I P	NC	NA
	For breaches likely to result in a risk to data subjects, do you report the breach to the supervisory authority within 72 hours with categories and the number of subjects concerned, the categories and number of data records concerned, the DPO's contact information, the likely consequences of the data breach, and measures proposed or taken to address the breach?	33(1,3)	FC	I P	NC	NA

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	If you are a processor, do you notify the controller without undue delay after becoming aware of a data breach?	33(2)	FC	IP	NC	NA
	Do you maintain a data breach register including facts related to the breach, effects and remedial actions taken?	33(5)	FC	IP	NC	NA
	Do you communicate breaches to affected data subjects without undue delay and in clear and plain language?	34(1,2)	FC	IP	NC	NA
Processors	Do you maintain policies and procedures for contracting and conducting due diligence on processors and sub processors?	24(1,2,3)	FC	IP	NC	NA
	Do you only use processors that ensure protection of data subject rights using appropriate technical and organizational measures?	28(	FC	IP	NC	NA
	If you are a processor, do you not engage with other processors without prior specific and general written authorisation from the controller?	28(2)	FC	IP	NC	NA
	Are all processors governed by a contract that establishes the subject matter of processing, duration of processing, nature and purpose of processing, type of personal data and categories of data subjects, and obligation and rights of the controller?	28(3)	FC	IP	NC	NA
	Do contracts and service level agreements with processors outline international data transfers restrictions, ensure confidentiality from persons processing personal data, ensure deletion or return of personal data to controllers at the end of services, allow controllers and auditors to obtain information necessary for inspections.	28(3)	FC	IP	NC	NA
	Do processors ensure data protection by design and default in all processing activities?	25(1)28(1)	FC	IP	NC	NA
Data transfers	When transferring or disclosing personal information, do you encrypt data and only send necessary data?	32(1)	FC	IP	NC	NA
	Do you use secure data transfer methods for all communications (e.g., email, file transfers, website forms, payments)?	32(1)	FC	IP	NC	NA
	Have you identified all international data flows and export mechanisms?	44	FC	IP	NC	NA
	Are international data transfers authorized by the Commission (Article 45) or appropriately safeguarded in addition to preserving data subject rights and legal remedies (Article 46)?	45(1) 46(1,2)	FC	IP	NC	NA
	Do you regularly check the Official Journal of the UK / European Union for withdrawals and changes to data transfer authorisations?	45(8)	FC	IP	NC	NA
	Are appropriate data transfer safeguards provided for by contractual clauses or provisions inserted into administrative arrangements?	46(3)	FC	IP	NC	NA
	When relying on binding corporate rules for data transfers, do you ensure they are legally binding and apply to and are enforced by every member concerned of the group of undertakings, in addition to expressly conferring enforceable rights on data subjects with regard to the processing of their personal data?	47(1)	FC	IP	NC	NA
	Do binding corporate rules specify all items in Article 47(2)?	47(1,2)	FC	IP	NC	NA

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Process Analysis Worksheets

Personal Data  - Denotes Not Applicable

Personal Data (PD)	YES	NO	Not Applicable	
Are you processing PD	✓	<input type="checkbox"/>	<input type="checkbox"/>	
Special Category PD	✓	<input type="checkbox"/>	<input type="checkbox"/>	
Children's PD	✓	<input type="checkbox"/>	<input type="checkbox"/>	
Scope of Application				
UK Controller	✓	<input type="checkbox"/>	<input type="checkbox"/>	
UK Processor	✓	<input type="checkbox"/>	<input type="checkbox"/>	
Main Establishment	UK			
Non- UK/EU Processor	<input type="checkbox"/>	<input type="checkbox"/>	✓	
Joint Controllers	<input type="checkbox"/>	<input type="checkbox"/>	✓	
Lawful Grounds	YES	NO	Not Applicable	
Are there lawful grounds for processing PD	✓	<input type="checkbox"/>	<input type="checkbox"/>	
Are there lawful grounds for processing Spec Cat Data	✓	<input type="checkbox"/>	<input type="checkbox"/>	
Consent for use of PD	✓	On Registration & request		
Can Data Subjects withdraw consent	✓	Sometimes	<input type="checkbox"/>	
Transparency				
Is Data Subject notified of processing	✓	<input type="checkbox"/>	<input type="checkbox"/>	
Source of PD	Staff			
Source of PD	Public			



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Principles & Accountability	YES	NO	Not Applicable
Purpose Limitation	✓	<input type="checkbox"/>	<input type="checkbox"/>
Data minimisation	✓	<input type="checkbox"/>	<input type="checkbox"/>
Accuracy	✓	<input type="checkbox"/>	<input type="checkbox"/>
Storage & Retention	✓	<input type="checkbox"/>	<input type="checkbox"/>
Integrity & Confidentiality	✓	<input type="checkbox"/>	<input type="checkbox"/>
Accountability	✓	<input type="checkbox"/>	<input type="checkbox"/>
Data Subjects Rights	YES	NO	Not Applicable
Access (<i>Download themselves</i>)	✓	<input type="checkbox"/>	<input type="checkbox"/>
Portability	✓	<input type="checkbox"/>	<input type="checkbox"/>
Erasure	✓	<input type="checkbox"/>	<input type="checkbox"/>
Rectification	✓	<input type="checkbox"/>	<input type="checkbox"/>
Right to Object	✓	<input type="checkbox"/>	<input type="checkbox"/>
Profiling & Automated Processing	✓	<input type="checkbox"/>	<input type="checkbox"/>
Data / Office Security	YES	NO	Not Applicable
Appropriate tech & org measures in place	✓	<input type="checkbox"/>	<input type="checkbox"/>
Designated responsible persons	✓	<input type="checkbox"/>	<input type="checkbox"/>
Are / is MFA in place?	✓	<input type="checkbox"/>	<input type="checkbox"/>
Industry Std Encryption	✓	<input type="checkbox"/>	<input type="checkbox"/>
Access to restored PD if required in event of physical / technical event	✓	<input type="checkbox"/>	<input type="checkbox"/>
Steps to pseudonymise / redact PD where possible & necessary	✓	<input type="checkbox"/>	<input type="checkbox"/>
	✓	<input type="checkbox"/>	<input type="checkbox"/>
Staff Manual Records – locked away in cabinets	✓	<input type="checkbox"/>	<input type="checkbox"/>
Staff Payroll Securely processed & accessed	✓	<input type="checkbox"/>	<input type="checkbox"/>
Office Access Key & Keypad access	✓	<input type="checkbox"/>	<input type="checkbox"/>
CCTV in operation	✓	<input type="checkbox"/>	<input type="checkbox"/>
Photo Copier HD Aware	✓	<input type="checkbox"/>	<input type="checkbox"/>



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Data Breaches	YES	NO	Not Applicable	
Breach Response Obligations	✓	<input type="checkbox"/>	<input type="checkbox"/>	
Documented Response Plan for Privacy & Incident Identification	✓	<input type="checkbox"/>	<input type="checkbox"/>	
Policies & Monthly Meetings & Hazard Logs	✓	<input type="checkbox"/>	<input type="checkbox"/>	
Procedures in place to notify DPA & DPO	✓	<input type="checkbox"/>	<input type="checkbox"/>	
Clear internal guidance for notification & responsibilities	✓	<input type="checkbox"/>	<input type="checkbox"/>	
Are Data Breaches documented	✓	<input type="checkbox"/>	<input type="checkbox"/>	
International Data Transfers	YES	NO	Not Applicable	
Is PD transferred outside the UK / EU?	<input type="checkbox"/>	<input type="checkbox"/>	✓	
Does this include Special Category Data?	<input type="checkbox"/>	<input type="checkbox"/>	✓	
What is the purpose of the Transfer?				
Which country is it transferred to / from?			✓	
Is there a legal transfer mechanism in place?			✓	
Are specific transfers appropriately covered?			✓	
Are Data Subjects told of transfers?	<input type="checkbox"/>	<input type="checkbox"/>	✓	
Main Database held	UK			
Other Controller Obligations	YES	NO	Not Applicable	
Is Privacy Training Provided	✓	<input type="checkbox"/>	<input type="checkbox"/>	
Are there clear DPA policies in place	✓	<input type="checkbox"/>	<input type="checkbox"/>	
Do you require a DPO	<input type="checkbox"/>	<input type="checkbox"/>	✓	
DPIA's	YES	NO	Not Applicable	
Process to identify the need for one	✓	<input type="checkbox"/>	<input type="checkbox"/>	
Is due diligence done	✓	<input type="checkbox"/>	<input type="checkbox"/>	
Are stipulated terms in processor contracts	✓	<input type="checkbox"/>	<input type="checkbox"/>	



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External 3 rd Parties	Priv Notice in Scope?	Stored	Contract	
Hive HR	Website in scope	UK	✓	
Mulberry Payroll	Website in scope	UK	✓	
Lloyds Bank	Website in scope	UK	✓	
Vision Website	Website in scope	UK	✓	
Shred-IT	Website in scope	UK	✓	
Netcom IT Systems	Website in scope	UK	✓	
DBS Checking		UK	✓	



Policies & Procedures	Situation	
Record of Processing Activities (RoPA) Mapping	Needs (ed) updating	
Asset Register	✓	
Privacy Policy & Notice	✓	
Data Retention Policy	✓	
Data Subject Access Policy	✓	
Data Subject Access Log	✓	
Data Breach Policy & Log	✓	
Data Security & Protection	✓	
Staff Training Policy	✓	
DPIA Form/Procedure	✓	
IG/ Confidentiality & Data Protection Policy	✓	
Data Quality Policy	✓	
CCTV Policy	✓	
Portable & Home Working Policy	NONE	



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Allocated Privacy Roles		
IG Lead – Clerk	✓	
DPO – Although not legal requirement	✓	
On-going legal proceedings	NONE	
Website		
SSL Security	✓	
Hosted by:	Vision IT	
Contract with host company	✓	
Internal CRM Database	✓	
Privacy Policy	✓	
Privacy Notice	✓	
DPO on policy – not required	<input type="checkbox"/>	
Cookie Policy	✓	
Contact forms – manual checking	✓	
Certifications		
ICO Renewal Date	06 July 2026	
Registration Number	Z8029622	
Named DPO on ICO site	<input type="checkbox"/>	
ISO 27001 Compliancy	N/A	
Cyber Essentials	N/A	
DSP Toolkit	N/A	
DTAC	N/A	
DCB0129	N/A	
Secure Database Used		
N/A	✓	



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Document Destruction		
External / Internal Shredding	✓	
Contract in Place	✓	
Org. - Shred IT on-site	✓	

Summary of Main Findings (*A snapshot image*)

Record of Processing Activities (RoPA / Data Mapping)

UK-GDPR / Data Protection Act 2018 compliance is a *process* and not a deadline and Article 30 of the GDPR is one of the places where this is particularly true. An ongoing process – this document (RoPA) **should be** kept up to date when any new process / hardware / software / third-party comes 'into contact' with any personal data.

Website: Short Website Basic Penetration Test

Website Server Location: (UK)

Site Secure: HTTPS encrypts nearly all information sent between a client and a web service. Properly configured, it guarantees three things:

- **Confidentiality.** The visitor's connection is encrypted, obscuring URLs, cookies, and other sensitive metadata.
- **Authenticity.** The visitor is talking to the "real" website, and not to an impersonator or through a "man-in-the-middle".
- **Integrity.** The data sent between the visitor and the website has not been tampered with or modified.



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A plain HTTP connection can be easily monitored, modified, and impersonated. Every unencrypted HTTP request reveals information about a user's behaviour, and the interception and tracking of unencrypted browsing has become commonplace.

Cookie Policy & Cookie wording:

According to the websites Cookie Policy – there are 4 trackable cookies utilised.

There **is** a current requirement under the Privacy & Electronic Communications Regulation (2003) – where the user can **accept** the use of, or **reject all** cookies on their computer as well as define specific ones. – *(However this has been amended in the new Data (Use & Access) Act 2025 when it comes into force in the next 12 months.. Should the Council wish in the future to add cookies, then this MUST be taken into consideration. & The ICO has recently stated that it will be very 'concerned' about websites who do not have 'reject' or 'decline all' button as well as accept.*

Website Privacy Policy & Notice:

There is a compliant Privacy Notice available on the website, – which outlines the basic transparency of the organisation offering the data subject rights & various contact details – this requires updating.

Third Party trackers:

A third-party request is a request to a domain that's not <https://www.cranleigh-pc.gov.uk/> or one of its subdomains. These 'requests' / 'trackers' follow the user around the website and may follow them after they leave the website under view

Third-party requests			
12 requests (12 secure, 0 insecure) to 8 unique hosts.			
A third-party request is a request to a domain that's not cranleigh-pc.gov.uk or one of its subdomains.			
Host	IP	Classification	URLs
ajax.googleapis.com	2a00:1450:400f:804:200a::	Content (Google)	Show (1)
anijs.github.io	2606:50c0:8001::153::		Show (1)
cdn.jsdelivr.net	2a04:4e42:400::485::		Show (2)
cdnjs.cloudflare.com	2606:4700::6811:180e::	Content (Cloudflare)	Show (2)
connect.facebook.net	2a03:2880:f00a:s:face:b00c:0:3::	Social, FingerprintingGeneral (Meta)	Show (2)
region1.google-analytics.com	2001:4860:4802:32::36::	FingerprintingGeneral, Email, Analytics (Google)	Show (1)
www.google-analytics.com	2a00:1450:400f:801:200e::	FingerprintingGeneral, Email, Analytics (Google)	Show (2)
www.googletagmanager.com	2a00:1450:400f:801:2008::		Show (1)

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Data Processing Agreements

These are part of managing your responsibilities with your suppliers, and they with you & include:

- Payroll Services
- Accountancy Services
- DBS Checking

You should have contracts / agreements in place which state how data is passed securely between them and yourselves.

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Appendix 1 – Mandatory Policies etc. required for UK-GDPR and DPA18

Documents which must be in place and up to date.

- **Personal Data Protection Policy** ([Article 24](#)) – this is a top-level document for managing privacy in your company, which defines what you want to achieve and how.
- **Privacy Notice** (Articles [12](#), [13](#), and [14](#)) – this document (which can also be published on your website) explains in simple words how you will process personal data of your customers, website visitors, and others.
- **Employee Privacy Notice** (Articles [12](#), [13](#) and [14](#)) – explains how your company is going to process personal data of your employees (which could include their health records or even criminal records, etc.).
- **Data Retention Policy** (Articles [5](#), [13](#), [17](#), and [30](#)) – describes the process of deciding how long a particular type of personal data will be kept, and how it will be securely destroyed.
- **Data Retention Schedule** ([Article 30](#)) – lists all of your personal data and describes how long each type of data will be kept.
- **Data Subject Consent Form** (Articles [6](#), [7](#), and [9](#)) – this is the most common way to obtain consent from a data subject to process his/her personal data.
- **DPIA Register** ([Article 35](#)) – this is where you'll record all the results from your Data Protection Impact Assessment.
- **Supplier Data Processing Agreement** (Articles [28](#), [32](#), and [82](#)) – you need this document to regulate data protection with a processor or any other supplier.
- **Data Breach Response and Notification Procedure** (Articles [4](#), [33](#), and [34](#)) – it describes what to do before, during, and after a data breach.
- **Data Breach Register** ([Article 33](#)) – this is where you'll record all of your data breaches.
- **Data Breach Notification Form to the Supervisory Authority** ([Article 33](#)) – in case you do have a data breach, you'll need to notify the Supervisory Authority in a formal way.
- **Data Breach Notification Form to Data Subjects** ([Article 34](#)) – again, in case of a data breach, you'll have the unpleasant duty to notify data subjects in a formal way.

Data Protection Audit Report

Administration of the UK-GDPR Data Protection Act 2018

There is a major requirement in current data protection legislation to document everything done with personal data. This includes understanding where the data resides, what is held in the data, the sensitivity of data and the movement of data within and without the organisation.

One of the first things that will be checked by the ICO office, should an inspection be instigated, is the level of administration an organisation is carrying out regarding its collection, storage and processing of personal data.

In the event of a data breach, again it is this administrative data which will allow the organisation to identify the type of data breached, its level of sensitivity and who the breach may have affected. Since organisations only have 72 hours after identifying a 'notifiable' breach in which to provide the relevant information to the ICO, it makes sense to have this information readily available rather than having to assemble it from scratch at the time.

It must also be remembered that auditing the data, its use and sensitivity is not a one-off job but one which needs to be carried out on a regular (annual) basis.

The areas of the legislation that need to be administered are,

- Data Audit
 - What data is held where, types of data, sensitivity etc. Must also show the reasons for holding the data and when the data should be removed. This is known as the RoPA (Record of processing Activities)
- Data Transfers - A record of all data transfers for data processing. It must contain:
 - Data Source
 - Type of data
 - Name and address of Processor
 - Schedule of transfers (weekly, monthly etc.)
- Subject Access Requests – Keep a record of
 - Right to Object
 - Right to Restrict Processing
 - Right to Erasure
 - Right to Be Informed
- Data Breaches
 - What happened
 - When it happened
 - What Data was accessed
 - Whether data breach is serious enough to warrant informing data subjects.
- Record of DPIAs (Data Protection Impact Assessments)

Data Protection Audit Report

- a description of the processing operations and the purposes, including, where applicable, the legitimate interests pursued by the controller.
 - an assessment of the necessity and proportionality of the processing in relation to the purpose.
 - an assessment of the risks to individuals.
 - The measures in place to address risk, including security and to demonstrate that you comply.
 - A DPIA can address more than one project.
- Organisations Policies - These include:
 - name and details of your organisation (and where applicable, of other controllers,
 - your representative and data protection officer/lead);
 - purposes of the processing;
 - description of the categories of individuals and categories of personal data;
 - categories of recipients of personal data;
 - details of transfers to third countries including documentation of the transfer mechanism safeguards in place;
 - retention schedules; and
 - a description of technical and organisational security measures.

Employers collect and use personal data about employees - potential, present and past - for various purposes, including recruitment, benefits, salary, personnel files, sickness records, monitoring and appraisals, personnel reports and severance. Employers may have to collect employee data in order to comply with obligations under employment law and well as protect employees. Therefore, employers should ensure that employee data is processed in accordance with all aspect of the Regulation, including giving employees the right to access their personal data through an employee 'data subject access request'.

Legal basis for processing employee personal data.

Employers will usually rely on the following grounds to process employees' personal data:

- The employee has given consent (*although relying on consent has considerable disadvantages, as discussed below*).
- Processing is necessary to fulfil the employment contract between the employer and employee.
- Processing is necessary for compliance with a legal obligation to which the employer is subject.
- Processing is necessary for the employer's legitimate interests.

Typically, the employment contract between employer and employee includes a provision stating that the employee agrees the employer can use their personal data.

Data Protection Audit Report

Frequently the employment contract does not spell out what this means but instead directs the employee to the employee handbook or a data privacy notification that explains in more detail how personal data collected about employees will be used by the employer.

Consent:

Although obtaining the consent of the employee appears to be an easy solution for processing employee data it is best avoided. True consent as required under the data protection law is notoriously difficult to achieve, because to be valid, consent must be a freely given, specific, informed and unambiguous indication of the employee's wishes signifying agreement.

The Data Protection Authority (ICO) have stipulated that reliance on consent should be confined to those circumstances where a worker has a genuine free choice and is able to withdraw their consent without suffering any detriment. When consent is not free, it is not valid. The concern of the Data Protection Authority is that employees do not have genuine freedom due to the unequal balance of power in an employer-employee relationship. Recital 43 of the GDPR specifically states that consent should not provide a valid legal ground for processing of personal data in a specific case where there is a clear imbalance between the data subject and the controller. Employees may feel pressured into providing consent to the use of their data because they may fear that to refuse would have a prejudicial effect on their employment. Therefore, employers are ill advised to rely solely on consent other than in cases where a subsequent withdrawal of consent would not be problematic for the lawfulness of the processing activity or detrimental to the employee's employment.

It is important to recognise that the processing of employee data may be unlawful or unfair under local law even if the employee has consented. An employee may have consented to the collection of personal data for example, even when local law stipulates that consent cannot be given for this type of processing. Alternatively, the consent may involve the collection of data that is disproportionate to the purpose the employer is pursuing. In other words, even if consent is obtained, the employer must still comply with all other aspects of data protection law.

Consent should effectively be a measure of last resort to which an employer turns to only when *absolutely necessary*.

Processing necessary to fulfil an employment contract:

Certain processing of employee data by the employer is necessary in order to fulfil the employment contract. E.g. to pay the employee, the employer must process the employees name and bank detail. Or, by virtue of using the employer's communications system, certain information about the employee will be captured and processed by the employer.

Processing necessary for a legal obligation:

Specific laws are likely to place specific obligations on employers that may require the processing of employee data. E.g., Employer is required to provide details on salaries to the tax authorities.

Legitimate Interests:

Data Protection Audit Report

In many cases, an employer will be able to rely on the legitimate interest ground to process personal data about employees. E.g., when an employer carries out a structural system change to migrate employee data from an old payroll system to a new one, this is likely to be processing on the basis of legitimate interest.

Processing sensitive personal data:

Where sensitive personal data on employees – racial or ethnic origin, political opinions religious or philosophical beliefs, trade union membership, genetic data, biometric data or data concerning health or sex live, all of which can be interpreted broadly – is collected and processed, the company must ensure that it complies with one of the exceptions specified in Article 9 of the Regulation. The first of those exceptions is relying on the specific consent of the individual, but again, this option should be an employer's last resort, not the first, because of the difficulties inherent in obtaining the valid consent of the employee in an employer-employee relationship.

Data Protection Audit Report



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Please note, no advice we offer is to be considered legal advice, only recommendations and interpretation of current data protection legislation from many years of practise. Should the organisation require legal advice you should seek it from a legal professional. (E & OE).

The Role of the DPO is to be responsible for monitoring an organisation's compliance, informing, and advising on its data protection obligations and acting as a contact point for data subjects and the relevant supervisory authority.



CRANLEIGH PARISH COUNCIL

SUBJECT ACCESS REQUEST POLICY

1. PURPOSE

To promote and ensure the proper and legal administration of Subject Access Requests (SAR) received by staff at Cranleigh Parish Council.

2. SCOPE

This policy has particular relevance to all Cranleigh Parish Council staff and councillors who engage with members of the public either personally, verbally, or by email.

3. POLICY STATEMENT

Cranleigh Parish Council recognises the benefits of using written procedures and policy to ensure legal compliance and consistency with the administration of Subject Access Requests (SAR).

3.1 At A Glance

- Individuals have the right to access and receive a copy of their personal data, and other supplementary information.
- This is commonly referred to as a 'Data' Subject Access Request or 'SAR' / 'DSAR'
- Individuals can make SARs verbally, in person or in writing, including via social media or via a link on our website Privacy Notice - <https://gdpr-info.com/data-protection-contact-form/>
- A third party can also make a SAR on behalf of another person.
- In most circumstances, you cannot charge a fee to deal with a request.
- You should respond without delay and within one month of receipt of the request.
- You may extend the time limit by a further two months if the request is complex or if you receive a number of requests from the individual.

- You should perform a **reasonable & proportionate** search for the requested information.
- You should provide the information in an accessible, concise, and intelligible format.
- The information should be disclosed securely.
- You can only refuse to provide the information if an exemption or restriction applies, or if the request is manifestly unfounded or excessive.

3.2 Preparing for subject access requests (SAR)

- We know how to recognise a subject access request, and we understand when the right of access applies.
- We have a policy for how to record requests we receive verbally.
- We understand what steps we need to take to verify the identity of the requester, if necessary.
- We understand when we can pause the time limit for responding if we need to ask for clarification. (If a controller **needs more information** from the data subject to identify the individual or locate the data requested, then: **the response clock pauses** – the countdown to the deadline **stops & the clock restarts** only **once** the controller receives the necessary information)
- We understand when we can refuse a request and are aware of the information we need to provide to individuals when we do so.
- We understand the nature of the supplementary information we need to provide in response to a subject access request.
- We have suitable information management systems in place to allow us to locate and retrieve information efficiently. Searching all databases and all relevant filing systems (manual files) in Cranleigh Parish Council, including all back up and archived files, whether computerised or manual, and including all e-mail folders and archives & CCTV. The Parish Clerk maintains a data map (RoPA) that identifies where all data in Cranleigh Parish Council is stored.

3.3 Complying with subject access requests

3.3. Right of Access

The right of access, commonly referred to as subject access, gives individuals the right to obtain a copy of their personal data, as well as other supplementary information. It helps individuals to understand how and why you are using their data, and check you are doing it lawfully.

3.4 Recognising a subject access request (SAR)

An individual can make a SAR verbally in person, or in writing, including on social media. A request is valid if the individual is asking for their own personal data. An individual does not need to use a specific form of words, refer to legislation or direct the request to a specific contact. An individual may ask a third party (e.g. a relative, friend or solicitor) to make a SAR on their behalf. You may also receive a SAR made on behalf of an individual through an online portal. Before responding, you need to be satisfied that the third party making the request is entitled to act on behalf of the individual. It is the third party's responsibility to provide evidence of their authority.

3.5 Requests for information about children

Before responding to a SAR for information held about a child, you should consider whether the child is mature enough to understand their rights. If the request is from a child and you are confident, they can understand their rights, you should usually respond directly to the child. You may, however, allow the parent or guardian to exercise the child's rights on their behalf if the child authorises this, or if it is evident that this is in the best interests of the child. If a child is competent, they may authorise someone else, other than a parent or guardian, to make a SAR on their behalf.

3.6 Considerations when responding to a request.

You must comply with a SAR without undue delay and at the latest within one month of receiving the request. You can extend the time to respond by a further two months if the request is complex or you have received a number of requests from the individual, e.g. other types of requests relating to individuals' rights.

If you process a large amount of information about an individual, you may be able to ask them to specify the information or processing activities their request relates to, if it is not clear. *The time limit for responding to the request is paused until you receive clarification, although you should supply any of the supplementary information you can do within one month.*

3.7 Can we ask for ID?

Yes, you need to be satisfied that you know the identity of the requester (or the person the request is made on behalf of). If you are unsure, you can ask for information to verify an individual's identity. The timescale for responding to a SAR does not begin until you have received the requested information. However, you should request ID documents promptly.

3.8 Can we charge a fee?

Not usually. In most cases you cannot charge a fee to comply with a SAR. However, you can charge a 'reasonable fee' for the administrative costs of complying with a request if it is manifestly unfounded or excessive, or if an individual requests further copies of their data.

3.9 How do we find and retrieve the relevant information?

You should make reasonable efforts to find and retrieve the requested information. However, you are not required to conduct searches that would be unreasonable or disproportionate to the importance of providing access to the information.

3.10 How should we supply information to the requester?

An individual is entitled to a copy of their personal data and to other supplementary information (which largely corresponds with the information that you should provide in a privacy notice). If an individual makes a request electronically, you should provide the information in a commonly used electronic format, unless the individual requests otherwise.

When deciding what format to use, you should consider both the circumstances of the particular request and whether the individual has the ability to access the data you provide in that format. It is good practice to establish the individual's preferred format prior to fulfilling their request. Alternatives can also include allowing the individual to access their data remotely and download a copy in an appropriate format.

If an individual asks, you can provide a verbal response to their SAR, provided that you have confirmed their identity by other means. You should keep a record of the date they made the request, the date you responded, details of who provided the information and what information you provided.

As the controller of the information, you are responsible for taking all reasonable steps to ensure its security.

3.11 When can we refuse to comply with a request?

Where an exemption applies, you may refuse to provide all or some of the requested information, depending on the circumstances. You can also refuse to comply with a SAR if it is manifestly unfounded or manifestly excessive.

If you refuse to comply with a request, you must inform the individual of:

- the reasons why
- their right to make a complaint to the ICO
- their ability to seek to enforce this right through the courts

3.12 What should we do if the request involves information about other individuals?

Where possible, you should consider whether it is possible to comply with the request without disclosing information that identifies another individual. If this is not possible, you do not have to comply with the request except where the other individual consents to the disclosure or it is reasonable to comply with the request without that individual's consent.

You need to respond to the requester whether or not you decide to disclose information about a third party. You must be able to justify your decision to disclose or withhold information about a third party, so you should keep a record of what you decide and why.

3.13 What other exemptions are there?

The exemptions are set out in Schedules 2 and 3 of the DPA 2018 as follows:

- Crime and taxation: general
- Crime and taxation: risk assessment
- Legal professional privilege
- Functions designed to protect the public
- Regulatory functions relating to legal services, the health & children's services
- Other regulatory function
- Judicial appointments, independence, and proceedings
- Journalism, academia, art, and literature
- Research and statistics
- Archiving in the public interest
- Health, education, and social work data
- Child abuse data
- Management information
- Negotiations with the requester
- Confidential references
- Exam scripts and exam marks
- Other exemptions

While the exemptions listed above are those most likely to apply in practice, the DPA 2018 contains additional exemptions that may be relevant when dealing with a SAR

3.14 Are there any special cases?

Yes. There are special rules and provisions about SARs and some categories of personal data, including:

- unstructured manual records
- credit files
- health data
- educational data
- social work data

3.15 Can the right of access be enforced?

Yes. In appropriate cases, the ICO may take action against a controller or processor if they fail to comply with data protection legislation. The ICO will exercise these enforcement powers in accordance with our Regulatory Action Policy.

If you fail to comply with a SAR, the requester may apply for a court order requiring you to comply or to seek compensation. It is a matter for the court to decide, in each case, what action to take.

3.16 Can we force an individual to make a SAR?

No. An enforced SAR is when someone requires an individual to make a SAR to gain access to certain information about them (e.g. their convictions, cautions or health records). This information is then used, for example, as supporting evidence regarding a job application or before entering into a contract for insurance. Forcing an individual to make a SAR in such circumstances is a criminal offence.

Adopted: July 2025

Review: October 2026



Working from Home Policy

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1. Introduction

Cranleigh Parish Council is committed to promoting flexible working to facilitate effective and efficient working. This policy outlines the circumstances under which the Council will allow employees to work from home. It also details the actions required to facilitate a home working arrangement.

Home working is about using the employees' home as a base for work instead of the employee coming into the workplace.

2. Defining Working from Home

Flexible or Hybrid homeworking is defined as time split between home and the office when an employee undertakes some of their duties from home on an agreed basis. This is usually planned and may be for complete or part days.

There may be times when the Council requires homeworking to meet business need during times of emergencies or as required by law. This is not defined as "flexible" homeworking.

Working from home enables work to be carried out more efficiently in a quiet location and without disruption. It may also prove a more efficient use of time if employees who have been away from their work base for part of day and are closer to their home on their return journey, complete the working day at home rather than at their normal place of work.

In cases where office facilities are shared, or the employee risks continual interruption, there may be agreement that an employee can work from home. This may include agreeing to home working on a regular basis or for a fixed period e.g. two weeks as well as shorter ad hoc periods. Managers and employees should be aware of the potential impact home working could have on teams e.g. isolation from the team, and/or Council activities, and a reduction in effective managerial support or supervision.

Many jobs may be considered for working from home. Any job that does not require time spent in one location or high visibility (e.g. operating machinery or delivering face-to-face customer care), may be adapted for home working. Jobs that involve project work or identifiable output, or those which provide services within the community, may lend themselves to home working.

Consideration should also be given to the impact on inter-relationships with other jobs, access by the public, access to/by colleagues, access to required information, technology, costs, and savings.

The following characteristics may lend themselves to home working:

- ✓ Defined output tasks
- ✓ Discrete projects or functions
- ✓ Autonomous jobs
- ✓ Jobs requiring frequent travel
- ✓ Jobs requiring high periods of concentration

Due to the nature of individual tasks some roles within the Council are not deemed suitable for home working. Two members of staff have had a variation to their contract of employment to permit home working two days per week.

3. Benefits of Working from Home

There are several benefits to home working. For the Council these include:

- ✓ Supporting a work-life balance
- ✓ Contributing towards the reduction of the Councils CO2 emissions by reducing unnecessary employee commuting
- ✓ The recruitment and retention of valued and skilled employees for whom the ability to work at home is the preferred option
- ✓ Well-motivated staff who feel that they work for an organisation that is prepared to be flexible and which trusts them
- ✓ Potentially increased output and quality of work due to fewer distractions than working in an office environment
- ✓ Accommodation of the requirements of disabled employees or employees with temporary health conditions
- ✓ Promotion of a positive image as a good employer
- ✓ Potential to reduced costs in terms of travelling allowances

The benefits to the employee include:

- ✓ Increased discretion in the management of their work and personal time
- ✓ Increased motivation
- ✓ A saving of travel time and costs
- ✓ The ability to work without distraction
- ✓ Improvements in work-life balance issues
- ✓ Feeling positive about the contribution to reducing CO2 emissions by reducing unnecessary commuting

While there are many advantages of home working, a detailed assessment needs to be made, by both the employee and the Council, as to whether the individual will be a suitable home worker and whether the role to be performed can be performed whilst working at home.

4. Conditions

- Home working arrangements should work for both the Council and the employees.
- Home working arrangements will only be considered following the completion of an employee's probationary period.
- Wherever possible requests for home working should be at least two weeks before the employee wishes to start the arrangement.
- In general, the Council will be supportive of employees working from home providing core business needs can still be met, and that the employee can meet all the requirements of their role from home.
- The working environment should be distraction free with work time for working.
- Where a request for homeworking is made by the employee, they will be responsible for setting up a safe and suitable workspace at home and providing appropriate office furniture and equipment.
- Where homeworking is at the request of the Council.
- Risk assessments of the home working environment, in line with legal requirements, must be undertaken.
- Requests should be considered regarding their own merits, considering resources, impact on colleagues and working relationships.
- Employees working from home must be available during normal business hours and should be able to answer calls and emails during the same day. When working from home employees are responsible for ensuring they are contactable during normal working hours. This should be a mobile phone for which an allowance is paid or phone supplied. Microsoft Teams and/or Zoom are also an acceptable means of being contactable, in addition to email.
- It is not considered necessary for those working from home to require supplies of stationery etc. Large volumes of printing and collating of documents should be carried out on Town Council premises.
- Regular communication and team check-ins when working remotely is essential to prevent isolation.
- Under no circumstances should home working be used as an alternative method of meeting carer requirements.
- Home working agreements will be reviewed where there are changes of circumstances, whether relating to employee, work they are required to undertake, or the working environment.

5. Responsibilities

Employer Responsibilities

Health & Safety - In line with the Health & Safety at Work Act 1974 ("the Act") and their Health & Safety Policy the Council will ensure, as far as reasonably practical, the health, safety, and welfare at work of all employees, including those working from home. The Council reserves the right to inspect home working premises to ensure that the Act, current risk assessments and Council policies and procedures are being adhered to. Reasonable notice will be given to employees before any inspection.

Hours of Work – Homeworkers must be mindful to take adequate rest breaks to maintain a work-life balance when working from home. Regular breaks, not working excessively long hours, and maintaining boundaries between work and home are essential. In regards breaks, as a minimum:

- A break of at least 20 minutes in any continued 6 hours working period.
- A daily rest break of at least 11 continuous hours, i.e. the time between stopping work one day and beginning work the next day, and.
- At least one complete day each week when no work is done.

Insurance - The Council accepts liability for accidents which are proven to have been caused by the authorised use of equipment provided by them in line with any instructions issued.

Data Protection, Security & Confidentiality - Council employees will be instructed that in instances where their colleagues are working from home, they will not disclose any personal details e.g. telephone numbers to anyone outside of the Council.

Council employees working from home must ensure secure networks and not public Wi-Fi, storing documents securely, and being mindful of screen visibility.

Running costs and expenses – Where the employee is choosing to work from home, the Council will not contribute towards costs – for example, heating and lighting, office furniture. The Council will provide the equipment required to work from home.

Employee Responsibilities

Health & Safety - Employees are expected to carry out their work in such a way as to ensure, as far as reasonably practical, that there is no risk to health and safety to themselves, members of their family or visitors. This includes hours of work and rest breaks.

Insurance - Home working may have an effect on domestic insurance policies. Employees wishing to work from home must inform their insurance company of the change in circumstances and the use, and identity, of equipment owned by the Council. An employee's mortgage provider may need to be informed. Employees living in council or privately rented accommodation should notify their property owner and/or examine the terms of their lease. Any equipment belonging to the employee but being used for Council business should be operated in line with any instructions issued. It is reasonable for the Council to assume that this done.

Accidents, Incidents & Dangerous Occurrences - In line with the Council's Accident Reporting Procedure, employees must inform their line manager of any accidents, incidents or dangerous occurrences which take place whilst working at home. The initial report should be via telephone with the appropriate paperwork being completed on the employee's return to the workplace.

Policies and Procedures - All work carried out on Council business is covered by the requirements of the Council's policies and procedures, even if this work is undertaken at home.

Data Protection, Security & Confidentiality - Arrangements for home working should ensure that the employee can maintain the security and confidentiality of documents within the home environment whilst complying with Data Protection legislation. Employees should use Council laptops and systems to perform their duties at home. Council employees working from home must ensure secure networks and not public Wi-Fi, storing documents securely, and being mindful of screen visibility.

Remote Access – To enable remote access, employees can use their Council issued laptop allowing full remote working with collaboration tools including the various software in use for communication. Security and confidentiality measures and policies must be adhered to.

Council Tax - If the area of the house being used for home working is also used by the rest of the family at other times there are no implications regarding Council Tax. However, if the area is used solely for business and is not available to the family there may need to be a change of definition. In such cases the employee should check the details with the Billing Authority.

Taxation - Employees choosing to work from home are not entitled to tax relief on additional outgoings. As there is no requirement to work from home there would be no tax relief on any proportion of the costs for heating, lighting and rent on rooms used for business purposes.

You may be able to claim tax relief for additional household costs if you must work at home on a regular basis, either for all or part of the week.

Equipment - Equipment required for home working will depend on the nature of the work being undertaken. The type and extent of equipment beyond the Council issued laptop, monitor, keyboard, and mouse will be based on the risk assessment. If any equipment owned by the Council is subsequently lost or damaged by an employee that employee shall be expected to pay for its replacement, if not covered by insurance.

6. Making an application for home working

An employee requesting occasional or regular home working should do so via the Clerk and should complete the application form and risk assessment form (Appendix 1). Employees are encouraged to complete the form electronically providing as much information as possible. Where the Clerk is requesting to work from home, the same information should be provided to the Council.

The Clerk, or the Council will take a decision based on the information included in this policy and discussion with the applicant.

If the risk assessment highlights any cause for concern the Clerk/Council should seek Health & Safety advice before any further action is taken.

The Clerk/Council will sign the application and risk assessment form and return a copy to the employee whilst advising them of the decision on their application. This will normally be within two weeks of the request being submitted.

If an employee wishes to appeal against the decision, they may do so by using the Council's Grievance Procedure.

7. Reviewing working from home arrangements

Home working arrangements will be reviewed on an annual basis, or sooner if circumstances change.

Council employees must be aware that any abuse of the home working arrangement may result in the Council taking disciplinary action.

Line managers have responsibility for monitoring and evaluating the working from home arrangements to ensure they are working for both the employee and the council. This should include periodic check-ins and reviews.

8. Monitoring and review of this policy

The Council shall be responsible for reviewing this policy to ensure that it meets legal requirements and reflects best practice.

Any proposed amendments will be presented to the Council for approval.

July 2025

Policy Review Date: October 2026

Appendix 1 Working from Home: Risk Assessment

1. General

- ☐ Completed a DSE assessment?

2. Chair

- ☐ Is the chair height adjustable?
- ☐ Is the back rest adjustable in height & tilt?
- ☐ Does the chair have a five-staff base?
- ☐ Is the chair comfortable?
- ☐ Do you need a footrest?

3. Desk / work surface

- ☐ Is the area large enough for all the equipment and the full range of tasks to be undertaken there (Employees should adopt a clear desk approach)?
- ☐ Is there sufficient clearance beneath the area for thighs and knees and to stretch the legs?
- ☐ Have you sufficient space to access your desk as well as more space around it?
- ☐ If you use a document holder is it positioned at same height and distance as your monitor?

4. Keyboard

- ☐ Is there sufficient space in front of the keyboard to place a wrist rest?
- ☐ Are all the keys present and in working order?

5. Mouse

- ☐ Is there sufficient space adjacent to the keyboard for the mouse to be used comfortably?
- ☐ Is it positioned close to the keyboard to prevent overextending or cramping of the wrist?
- ☐ Do you have a mouse mat?

6. Screen

- ☐ Is the monitor positioned firstly in front of you?
- ☐ Is the monitor positioned at the correct height? (when looking horizontally eyes should be resting just below the top of the screen)
- ☐ Does the screen tilt and swivel easily?
- ☐ Is the image on the screen clear and stable?

7. Environment

- ☐ Are there any manual handling issues relating to you working from home?
- ☐ Is the work area free from trip hazards – including the tidying of cables and leads?
- ☐ Does the route to your workplace involve using a loft ladder?

- ☐ Are there access problems if you carry large or heavy items?
- ☐ Is the general lighting adequate?
- ☐ Can you eliminate strong light sources / reflections?
- ☐ Is the temperature and ventilations adequate and free from draughts?
- ☐ Is the work area free from distracting noise?
- ☐ Will your home working activities involve significant use of the telephone?
- ☐ Are you intending to use a mobile phone for this purpose, or will you have access to a land line?
- ☐ In relation to your electrical equipment is there any evidence of damage to plugs or leads?
- ☐ Is there any evidence of overheating?
- ☐ Are combustible materials kept away from sources of heat?
- ☐ Do you have a smoke alarm fitted?
- ☐ Do you know what action to take in the event of a fire?

8. I.T. Equipment

- ☐ I have a suitable broadband internet connection and good wi-fi or a cable to the router?



Business Continuity Policy 2025

1. Introduction

Cranleigh Parish Council is committed to ensuring continuity of essential services in the event of an emergency or disruption. This policy outlines the response to and recovery from incidents that may impact normal operations.

2. Objectives

- Identify critical services and functions
- Provide a clear action plan to manage disruptions
- Minimise the impact of emergencies on staff, residents, and council operations
- Facilitate recovery to normal operations as quickly as possible

3. Scope

This policy covers disruptions affecting:

- Staff availability
- Access to the council office or other key premises
- IT and communications systems
- Essential equipment and supplies
- External emergencies affecting council services

4. Responsibilities

- Parish Clerk: Lead role in incident response and decision-making
- Senior Admin Clerk: Supports the Parish Clerk; assumes lead in their absence
- Grounds Manager for external resources
- All Staff: Follow communication procedures and business continuity protocols

5. Risk Assessment

The Council maintains a risk register identifying likely threats, including:

- Fire, flood, or damage to premises
- Power or IT failure
- Cyber incidents
- Extreme weather
- Staff shortage
- External incidents (e.g., local infrastructure failure)

6. Critical Services

Priority services include:

- Public communications (e.g., website updates, noticeboards, social media)
- Cemetery management
- Open spaces and play park
- Planning responses
- Financial operations (payroll, supplier payments)
- Support to vulnerable residents (through local coordination of emergency plan)

7. Incident Management

If an incident occurs:

1. Initial Response: Assess severity and immediate actions (e.g., evacuation, emergency services contact)
2. Communication: Cascade messages internally and externally
3. Recovery Planning: Establish temporary working arrangements (e.g., remote working, use of alternative locations)
4. Coordination: Parish Clerk leads a coordination group to oversee decisions

8. Communication

Residents will be informed through noticeboards, social media, and the council website. All media enquiries must be referred to the Parish Clerk. Contact details for key partners and staff are maintained in a confidential internal contact list.

9. Testing and Review

This plan will be tested annually via a tabletop exercise and reviewed following any incident or annually at minimum.

10. Annexes

- Annex A: Risk Register Template
- Annex B: Communication Cascade Chart
- Annex C: Emergency Contact List
- Annex D: Office Inventory Checklist

July 2025

Policy Review Date: October 2026

Annex A – Risk Register Template

Risk Management Policy

https://www.cranleigh-pc.gov.uk/Policies_and_Other_Documents_15282.aspx

Generic Risk Assessment available on Sharepoint

Annex B – Communication Cascade Chart

Level 1 – Parish Clerk, Senior Admin Clerk, Grounds Manager, Chairman, Vice Chairman

Level 2 – All staff, all Councillors

Level 3 – General public through website, social media, noticeboards

Annex C – Emergency Contact List

IT, phones, broadband	Netcom IT Solutions
Roads/paths	Nick Knox
Grounds	Grasstex Limited
Trees	Dave Ford Tree Care
Cleaning	CMC
Pest Control	PGH
Building work	Case Electrical
Structural engineer	Hockley & Dawson
Electrician	Davd J Long
Plumbing/gas	Goodwins Building Services
Legionella	Musketeer Services
Fire/intruder alarms	Securitas
CCTV	Securitas
Key holding	Shield Guarding

Annex D – Office Inventory

Data	Sharepoint – Netcom IT Solutions
Financial Data	Sharepoint – Netcom IT Solutions
Financial Software	Rialtas Business Solutions
Burial Records	Office fire safe

Beverley Bell – Cranleigh

From: addressing@waverley.gov.uk
Sent: 31 July 2025 15:00
To: Beverley Bell – Cranleigh
Attachments: Phase 3 - Reference Site Layout BW - potential roads marked up.pdf; LOCATION PLAN.pdf

Dear Parish Clerk,

STREET NAMING APPLICATION SNN/2024/0151 – LAND AT WEST CRANLEIGH NURSERIES AND NORTH OF KNOWLE PARK BETWEEN KNOWLE LANE AND ALFOLD ROAD

The Council received a street naming application from Nicholas King Homes which is the developer of 4 newly built highways and 110 new dwellings situated at the above location.

The names being proposed for the new roads shown on the attached site plan are:

- **CORAL CLOSE**
- **GEM PLACE**
- **CHICORY ROAD**
- **DANDELION DRIVE**

We will also extend the following roads:

- **EXBURY CRESCENT**
- **BIBB ROAD**
- **BOSTON ROAD**

These names have been checked by the Address Development team against Waverley's policy. The proposed names have been deemed acceptable and as such we put them forward for your consideration. We have also consulted the Royal Mail with the proposed names.

Waverley's Street Naming and Numbering policy states that the only basis for objecting to a new street name can be on the grounds of:

- duplication;
- difficulty of pronouncing or spelling; and/or
- if the name could cause offence.

We ask that you assess the street name in this regard as there may be some local considerations that the Address Development team may not be aware of.

We would be grateful if you could email your response to the new street name by **MONDAY 22 SEPTEMBER AT NOON**. If Waverley does not receive a response from you by that date, the Address Development team will put the proposed names for approval.

Please find a link below to the Street Naming & Numbering Policy for Waverley Borough Council:

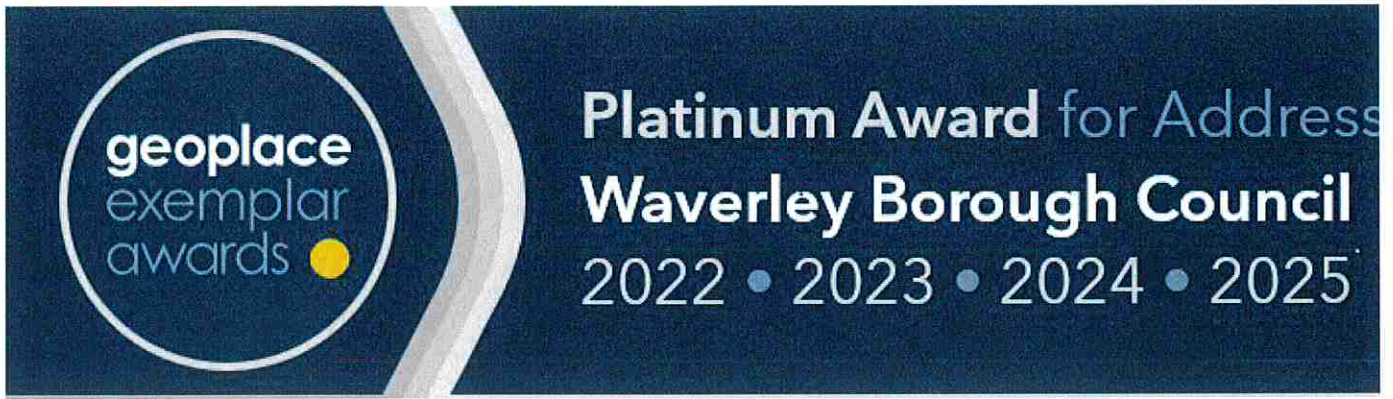
http://www.waverley.gov.uk/downloads/download/1029/street_naming_and_property_numbering_policy

Thank you for your assistance with this matter of street naming.

Kind Regards,

Elizabeth Silley

Address Development Team



0 50 100 200 500M

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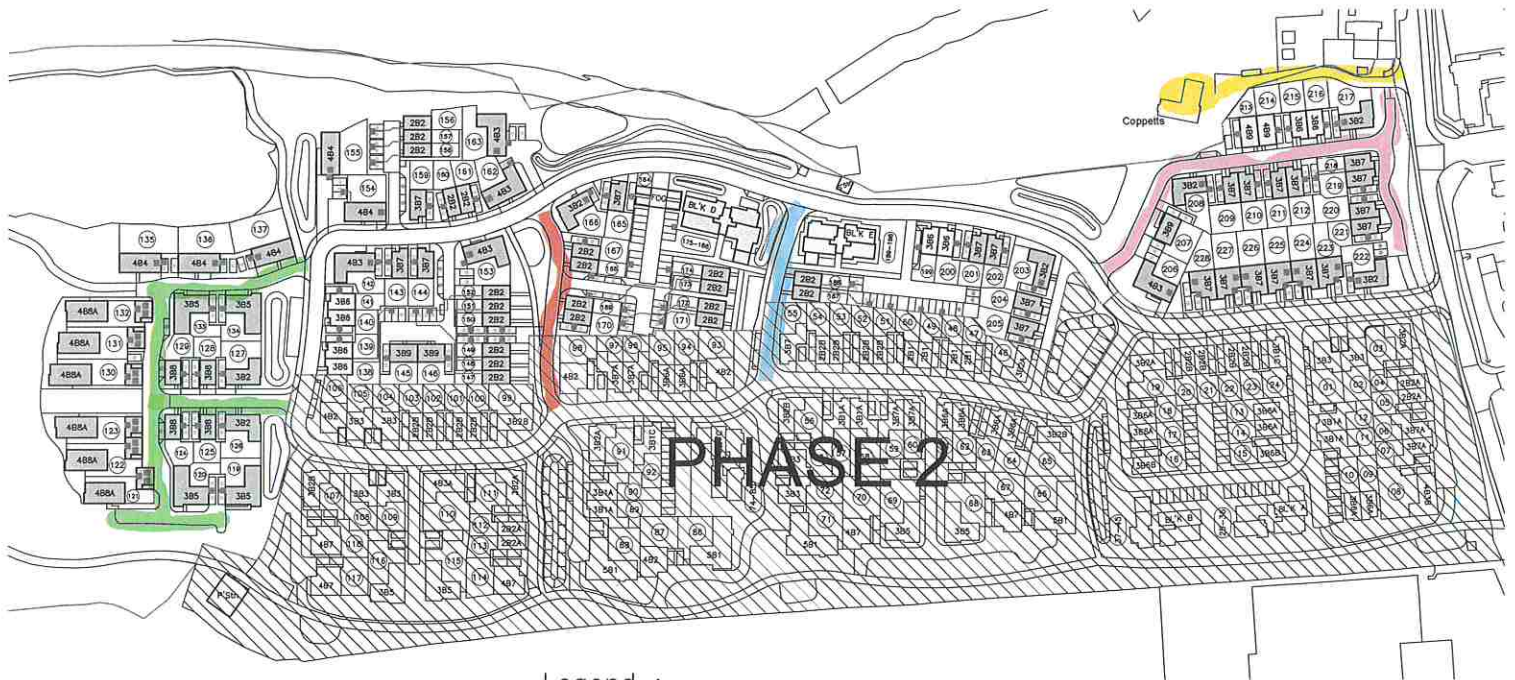
Scale: 1:5000 @ A3 Date: September 2016
Drawing No.: CPDL/KPI-2/001 Revision: R03



KEY
 SITE BOUNDARY

KNOWLE PARK INITIATIVE
Site Boundary

This drawing is the copyright of Architectus Limited. The contractor should check all dimensions on site. No dimensions are to be scaled from this drawing. It is the contractor's responsibility to ensure that all works are in compliance with the current requirements of statutory regulations (Building Regulations, British Standards etc.)



Legend :

- Private Tenure
- Shared Ownership Tenure
- Affordable Rental Tenure
- Electric Charging Point - See Note
- Parking Space - Private
- Parking Space - Shared Ownership
- Parking Space - Affordable Rental
- Parking Space - Visitors
- Garage Space - Private

NOTE - Electric Charging Points
To be wall mounted externally on Houses adjacent to parking spaces.
Plots 138, 147, 148, 151, 152, 154, 156-158, 171-174, 187, 188 & 218 to have pillar points adjacent their remote parking spaces.
Apartment Blocks to have communal pillar points (3x per Block)

C01 11.01.23 ML JR First Construction Issue
REV DATE AMEN APP REVISION

DRG No: 23-001-031
STATUS: CONSTRUCTION
SCALE: NOT TO SCALE
DRAWN: ML APPROVED: JR DATE: JAN.23

REV. C01



Architectus

Architectural Design and Technology
Capella House, 4 Railway Approach, Worthing, West Sussex, BN11 1UR
Tel: 01903 827085 Fax: 01903 827111 Email: designoffice@architectus.co.uk

CLIENT: NICHOLAS KING HOMES
PROJECT: KNOWLE PARK - PHASE 3 CRANLEIGH
DRAWING: REFERENCE SITE LAYOUT

Beverley Bell – Cranleigh

From: addressing@waverley.gov.uk
Sent: 27 August 2025 11:22
To: Beverley Bell – Cranleigh
Subject: STREET NAMING APPLICATION SNN/2024/0151 – LAND AT WEST CRANLEIGH NURSERIES AND NORTH OF KNOWLE PARK BETWEEN KNOWLE LANE AND ALFOLD ROAD

Dear Parish Clerk,

Further to our previous email we are adding an additional road name to the consultation - PARSLEY PLACE.

STREET NAMING APPLICATION SNN/2024/0151 – LAND AT WEST CRANLEIGH NURSERIES AND NORTH OF KNOWLE PARK BETWEEN KNOWLE LANE AND ALFOLD ROAD

The Council received a street naming application from Nicholas King Homes which is the developer of 4 newly built highways and 110 new dwellings situated at the above location.

The names being proposed for the new roads shown on the attached site plan are:

- **CORAL CLOSE**
- **GEM PLACE**
- **CHICORY ROAD**
- **DANDELION DRIVE**
- **PARSLEY PLACE**

We will also extend the following roads:

- **EXBURY CRESCENT**
- **BIBB ROAD**
- **BOSTON ROAD**

These names have been checked by the Address Development team against Waverley's policy. The proposed names have been deemed acceptable and as such we put them forward for your consideration. We have also consulted the Royal Mail with the proposed names.

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- duplication;
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- if the name could cause offence.

We ask that you assess the street name in this regard as there may be some local considerations that the Address Development team may not be aware of.

We would be grateful if you could email your response to the new street name by **MONDAY 22 SEPTEMBER AT NOON**. If Waverley does not receive a response from you by that date, the Address Development team will put the proposed names for approval.

Please find a link below to the Street Naming & Numbering Policy for Waverley Borough Council:

http://www.waverley.gov.uk/downloads/download/1029/street_naming_and_property_numbering_policy

Thank you for your assistance with this matter of street naming.

Kind Regards,

Better points

From This	To This
Residents driving to the high street	Residents active travelling to the high street
Theoretical benefits of active travel	Actualised benefits of active travel
Congestion of cars	Congestion of active travel
A community	An Active community
One method of transport	Many methods of transport

Goals

Initial Treasure-hunt routes within town

The idea behind the street tag is to provide incentives to more in-town journey leaving the car behind.

The initial method for this proposal is through treasure hunt style QR marked routes within the town. QR code in shop windows.

Initial focus on supporting trips already planned, changing only the method of transport. This is to reduce journey focus from active travel itself, and more towards part of a daily or weekly routine. This develops the habit of active travel for journeys, rather than journeys for rewards.

Secondary time-based rewards

By time gating certain rewards, specifically around the school opening hours, to encourage more families to leave their cars at home. The key thing to stress is this is not targeting a full swap of transport, rather than encourage a gradual change and to highlight the benefits. This would be in two ways:

The first method: Placing QR codes, starting at a local car park, then ending with a portable placed QR code outside by the school during set times.

The second would be encouraging those starting their active travel school journeys from home.

Investment

Local investment

We would request that that shop hosting the QR codes donate funds for the rewards budget. This Local investment would be ring-fenced for rewards only in this community. This has two benefits for those investing, the PR benefit of being seen to invest in the area (know local issue) and increase in funds locals must enjoy the facilities in the town.

While SME might have limited budget for charitable causes, what they do have is a marketing budget. The proposal would increase local footfall; it would be then down to the shop to capitalise on that opportunity. This is the reason the focus of the QR placement would be in these shops.

The individual SME investment required would be minimal, given the ring-fenced budget only for rewards. However, the main benefit from local investment is the agency, interest, and reduction in costs for advertising for the proposal. As system is no-longer a theoretical benefit but an actual defined one, companies will want to make the most and help market the Street tag proposal.

What Are We Confident We Can Achieve?

Our goal is to reduce local congestion and the demand for car parking. We aim to increase foot traffic around local shops, community hubs, and green spaces. By doing so, we will create a compelling evidence base that supports increased government investment in local pavements and active travel infrastructure. Ultimately, this will enable residents to spend less on travelling to the shops and more in those shops. Additionally, we seek to provide financial incentives for active travel while encouraging a circular economy within the town.

We envision a community-driven marketing approach: companies that invest will benefit from public relations boosts by being recognised as active contributors to the community, giving back rather than taking.

How Can You Help Make This Happen?

One way to assist is by placing QR codes in your windows and contributing to the Ring-Fenced Local Reward Budget. We recommend a contribution of £60 for small and medium-sized enterprises (SMEs), and a minimum of £120 for large national companies.

This initiative is not just a project offered to the community; it is a project driven by the community. We understand the challenges faced by SMEs, such as limited staff and the difficulties in achieving marketing value for money, which is why we provide comprehensive support.

“We offer custom prize options and a dedicated communications associate to assist with local engagement and communication planning throughout each season. We will also promote any new local events we become aware of by offering additional reward points to those who attend.”