



# Annual Review

## 2019/2020

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## I am delighted to welcome you to CALC's 2020 annual review - my first as your new Chairperson.

It is my honour to be part of the CALC family - an association that is one of Cumbria's best creations.

**CALC is future focused and member led**, with a committed and effective team of employees.

To me, CALC is not simply a great association; it is a movement for a better world, one where we can continue to **positively change the quality of life for our local residents**.

I am a firm believer that town and parish councils have the power to transform lives and make the impossible, possible – something that you, our local councils, have continued to show us throughout the Covid-19 lockdown period. Local council **creativity and determination** is showcased later in this review.

It has been great to hear so many of your stories over the past year, of your interactions with CALC, the community dreams you have realised and everything you have accomplished as CALC members. **Please keep sending us your project stories** because town and parish councils are our most passionate ambassadors – by sharing your experiences **you have the power to inspire others** to follow in your footsteps and courageously embark on their own council ambitions.

I hope you enjoy reading this annual review and that you remain proud of being part of Cumbria Association of Local Councils.

**Councillor Sue Castle-Clarke** | Chairperson, CALC

**375,00**

people in Cumbria live in parishes that are CALC members

**98%**

of Cumbria's parish councils are members of CALC (229 out of 233)

**73%**

of Cumbria's parish meetings are CALC members (25 out of 34 total)

**6**

District Associations offering members opportunities to link locally

**13**

Executive Committee members from across the county leading the association

**4**

part-time employees (Chief Officer and 3 Parish Liaison Officers)

**1000+**

queries from members across Cumbria answered during 2019/20

**306**

councillors and clerks from across Cumbria trained during 2019/20

**2**

town and parish councils' professionalism recognised under the Local Council Award Scheme

**£6,830,319**

raised in precepts during 2019/20 by Cumbria's town and parish councils

**15**

district association meetings arranged

## Welcome to CALC's new look annual review.

This year you'll notice some changes, not least in the name of this document. We felt that whilst reporting on CALC's financial position is very important, the Annual Report could do with a refresh and an update. Rather than a report, we are calling it a review – **reviewing the achievements** of the year both of our member councils and CALC as an organisation. And what a year to start! If you had told me at our last AGM in Wigton what the year ahead would bring, I would not have believed you.

However, despite the severity of the Covid-19 pandemic and the huge changes it has wrought on our communities and member councils, it has demonstrated once again that **parish and town councils are a vital engine for driving communities forward** to make the best of very difficult circumstances. I was delighted to receive a very warm letter of thanks and support addressed to you, our members, from Cllr Stewart Young, Leader of Cumbria County Council, for your collective, amazing efforts over the last few months – a very small snapshot of which I highlight later.

There's plenty to read, so please enjoy the new look review – if you have any comments, do feel free to share them with us at [office@calc.org.uk](mailto:office@calc.org.uk)

Kind Regards,  
**Samantha Bagshaw** | Chief Officer, CALC

## Thanks to our supporters

We would like to thank our member councils for their membership subscriptions. We are also extremely grateful to the following local authorities for their continued financial support, which is greatly appreciated.



**This year the Executive developed a Strategic Management Plan that will help us prepare for the future. Below we set out the headlines of that plan.**

## Our Vision

For Cumbria's Local Councils and Parish Meetings to be indispensable to their community.

## Our Mission

Cumbria Association of Local Councils will be future focussed and member led to support, promote and develop local councils within Cumbria for the benefit of those who live, learn and work within their parishes.

## Our Objectives

- Manage the organisation effectively to ensure it remains financially sustainable
- Maintain the current membership level
- Provide mentoring for new clerks
- Expand guidance for local councils in line with new legislation and emerging priorities of our partners and communities
- Publicise the activities and achievements of local councils to the general public
- Raise the profile of the Local Council Award Scheme
- Demonstrate the benefits of a qualified clerk to increase uptake of the Certificate in Local Council Administration
- Facilitate performance improvements within local councils
- Deliver relevant, more varied and reflective training
- Harness the skills and experience of CALC Executive Committee

## Our Values

- Leadership
- Openness
- Integrity
- Accountability
- 'Members first'



One of our core values is 'members first'. Last year we reviewed CALC's staffing structure to better support our members and deliver an enhanced service for councillors and clerks across Cumbria.

We introduced a new partnership with Steve Parkinson Associates to deliver expert advice and support for members with tricky financial or VAT queries, strengthening our in-house advice offer.



We have introduced free 30 minute legal consultations from parish council specialists Wellers Hedleys Law firm in Surrey. NALC's legal team cannot advise on actual legal cases, but Wellers Hedleys are the foremost parish legal firm in the UK.

Through offering support and advice, our aim is to help our members and their communities achieve great things together. Local councils want to be a force for good and through the COVID-19 challenges of the past year that is exactly what they have done.

## Parish Councils and Covid-19

Over the last 6 months, the Covid-19 Pandemic has been front and centre in everything parishes have done. The responses from parish councils has been magnificent. We cannot mention every parish's great work but we have highlighted a few parishes to give a flavour of what has been happening across the county.

### Two Tin Tuesday in Colton Parish Council



**Colton Parish Council** arranged a weekly collection for the Barrow food bank – asking parishioners to donate two tins each week.



The food was then delivered by volunteers. Colton also focused on well-being during the lockdown, producing a Wellbeing email every week full of suggestions for maintaining a positive outlook including visiting virtual museums, photographing flowers and wildlife and writing or reciting poems!



## Millom Town Council

Millom Town Council is typical of many councils across the county. They put together a flyer which was delivered to every household in the parish. It generated a list of volunteers, who collected prescriptions, did shopping and any other jobs that were needed by those who were either ill, shielding or unable to leave the home for any reason.

## Patterdale Parish Council



Patterdale Parish Council also set up a food bank and community hardship fund working in conjunction with the local Church, working

directly with those households hardest hit by the lockdown (for around 40 people) as well as providing support to local businesses and individuals in accessing government financial support (around 100 businesses from sole traders to hotels). They delivered details of all these support services to all the homes and businesses in the parish as well as utilising our existing parish online communication channels – a WhatsApp group and parish email distribution list.



## Innovative Employment Scheme - Patterdale PC

Since mid-April Patterdale PC has been focusing on projects to give meaningful work to some of the individuals in the village who are unable to access financial support by initially setting up a work exchange programme where residents could request work to be done on their behalf and the requests were matched with people willing to do the work. This was successful but it became clear the number of people wanting work far exceeded the demand from residents. A community work programme was therefore set up to offer people the chance to do projects to benefit the community whilst also providing them with some income if they needed it.

## Ousby Parish Council

The term "thankful village" was first used in the 1930s to refer to those communities who lost no men in the Great War. These villages had no war memorials, although some had monuments, usually erected in the church, in gratitude for their good fortune.



At the end of World War II, a small number of these "thankful villages" still remained free from war time losses. These communities became known as "doubly thankful villages". Ousby is one of just fourteen "doubly thankful villages" across the UK.

In 2019 Ousby Parish Council decided to replace the existing 'Ousby' name signs with ones which read 'Ousby – a doubly thankful village'. This project aimed to build on Ousby's special heritage by placing the village on the tourism map, encourage local hospitality businesses to develop new outward-looking opportunities and urge residents to celebrate their strong sense of place.

Having a readily identifiable "doubly thankful village" within Eden is a different heritage attraction for visitors from outside the area and for this reason the project secured financial support from Cumbria County Council's community fund and an Eden District Council tourism grant.

## Kendal Town Council



Kendal Town Council, alongside South Lakeland District Council and South Lakes Action on Climate Change, created a Pollinators Project from 2016-2019. The project saw the stakeholders provide funding for schools and community groups to take part in a range of activities that will explain the importance of pollinating insects while creating homes and habitats for them.

The project aimed to develop a corridor for pollinating insects on the canal towpath through the middle of Kendal. Schools and community groups were asked to develop plots on the canal towpath that will, in different ways, explain the importance of and encourage pollinating insects. The project will form an outdoor public gallery of mini-projects, ideas and experiments all about the importance to us all of our pollinators.

The project saw an increase in the amount, and types, of bees, beetles, butterflies and moths throughout the project. The project involved 720 children and culminated in community awareness as well as increased wildlife habitats.

## District Associations' activities

There are a range of meetings held in each district for our members - councillors and clerks are welcome. Some are 'three tier' meetings meaning representatives of the local borough or district council and county council are present. These are sessions to discuss local issues such as highways, devolution of assets, community governance reviews or considering proposed changes to the local plan.

Some districts run other events for their members, such as an evening in Eden listening to a person from 'Fields in Trust' explaining the benefits of working with their organisation to protect green space in perpetuity.

Carlisle Parish Council Association piloted a multi-agency event held in Wetheral Village Hall called 'Caring for your Community'.

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**'Caring for your Community – How can we help'** was an ambitious afternoon to bring parish councillors and a wide range of partners together to focus on health and happiness.

## Partners included:

Cumbria County Council • ACTION with Communities in Cumbria  
Age UK (Carlisle & Eden) • Alzheimer's Society • Brampton & Longtown  
Rotary Club • Carlisle Samaritans • Cumbria CVS  
Paul Caine, Carlisle City Council Community Neighbours  
Royal Agricultural Benevolent Institution • Streetscape (Sponsor)  
Tracey Robbins, Carlisle City Council • The Big Lunch

There were a range of speakers too, covering topics such as the importance of getting active, the **dangers of loneliness and social prescribing**.

Feedback was that it was **'inspiring and informative'**...little did they know how health and wellbeing would be challenged in less than a month's time.



### **CALC's Chief Officer attends the following meetings to ensure that each group is aware of the needs of the parish and town council sector:**

**County Wide Resilience Group** – group for escalating issues raised by the district resilience hubs

**Cumbria Chief Executive Covid 19 group** – strategic, county-wide issues regarding the pandemic, including matters that need escalating to central government.

**Cumbria Monitoring Officers** – very useful for discussions of remote meetings, including data sharing protocols, different forms of technology, the methodology for training members in how to manage remote meetings including setting up buddy systems and up to 5 training sessions. They have also produced revised Standing Orders for remote meetings.

**NALC County Officers** – around 43 county officers join NALC legal team to discuss issues in their areas. The early meetings showed that Cumbria was very quick in putting together an impressive response to Covid 19 via the local Resilience Hubs and the County wide multi-agency Resilience Forum. Useful discussions on the many governance issues that have arisen.

**Cumbria, Northumberland, County Durham and Cleveland County Officers Meeting** – fortnightly meetings to share notes, ideas and suggestions.

**Parish Liaison Officers** attend the local Resilience Hub meetings weekly where issues on the ground have been discussed and hopefully resolved. Any issues that cannot be dealt with go up to the county wide teleconference.



## NALC 'Lobby Day' in Westminster 10th March 2020

NALC organised 'Lobby Day' to develop relationships between MPs and their corresponding county association. CALC's Chief Officer, Sam Bagshaw and Executive Committee member, Cllr Rick Petecki, attended a full day of presentations and meetings with some of Cumbria's MPs, including John Stevenson MP for Carlisle, Mark Jenkinson

MP for Workington, Simon Fell MP for Barrow and Furness and Tim Farron MP for, Westmorland and Lonsdale.

The lobby day started with a presentation on local democracy and communities from the All Party Parliamentary Group. Local government reorganisation is taking place in a number of counties and MPs are aware of the need for town and parish councils to represent their communities in any newly formed unitary authority arrangements.



## The Local Council Award Scheme

We were delighted that Windermere Town Council achieved the Local Council Award (Foundation Level) this year.

Julie explained, 'It was the culmination of approximately two years of work which involved reviewing all of the Councils procedures and policies, which sounds very dry and "administrative." However, questioning the way we do things, has led us to improve the way we work - from how we use and manage our website to how we organise our documents and data to enable easy access and retrieval. The process also made us question where we needed written policies and to put these in place, so that we are ready for events rather than dictated by them. For instance, we already had our homeworking policies in place prior to the outbreak of Covid 19 which saved us time and meant we could focus our time on community response rather than putting our own house in order. All in all, a worthwhile use of our time as a Council'.

**The Local Council Award Scheme** was launched in January 2015 and is available at foundation, quality and quality gold levels. It is awarded in recognition of a local council's professionalism and ability to do their best for the community they serve. If your council is interested in applying for the Local Council Award Scheme, please contact us at [office@calc.org.uk](mailto:office@calc.org.uk)

## Certificate in Local Council Administration

The Certificate in Local Council Administration is a foundation qualification for clerks. Having a CiLCA-qualified clerk should be the aim of all councils, as it gives confidence that you are receiving up to date, accurate advice. With two thirds of your council members elected (not co-opted) and your clerk CiLCA-qualified, your council becomes eligible for the General Power of Competence, which widely expands your powers to achieve things for the community.





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## How long have you been a clerk?

I have been a parish clerk for 9 years

## How many parish councils do you clerk?

I have 9 Parish Councils & 1 Parish Meeting

## How did you start being involved in parish councils and parish meetings?

Helping the Chairman of Threlkeld PC out when their former Clerk left suddenly at year end, to do the AGAR etc.

## What skills do you think clerks need?

Clerks need to be able to be neutral, and to take control when needed, I know technically it is the chairman, but a lot of the times it is the Clerk!! You need to be diplomatic and remain neutral!

## How does it fit with family life?

Brilliantly, I can do school runs, get involved with the PTA etc and when "lockdown" started, I was able to adjust my working hours at home to fit around home-schooling.

## Are you Cilca qualified? If so, how did you find the course and are you glad you did it?

Yes. Once I got my head into the course, I found it easy, with a mentor to support me, I am glad I did it.

## What do you enjoy about the job?

I enjoy the "local" elements, each parish has its own "quirks" and characters!! You learn quickly how the councillors respond to topics and from this how meetings will go, and what each parish has an opinion on!

## Anything you don't enjoy?

Trying to remember how to "turn off", I find I work as and when necessary, and really need to set some "work" hours, and "non work" times!

## Any advice for new clerks?

Set boundaries early on, regarding times/how you are contacted – do you want to be contacted via Facebook messenger, personal mobile/personal email etc? The job is not known for being 9-5 Monday to Friday, but this doesn't mean it is acceptable to have phone calls at 9.30pm and all weekend.

- ✔ Timely advice on any aspect of local council work, by email or by phone if it is urgent
- ✔ A regular newsletter, emailed to councils and councillors, providing information and guidance on current issues relevant to local councils
- ✔ The provision of a range of publications, both digital and hard copy, on local council work
- ✔ A CALC website to provide information about all parishes to the general public, as well as downloadable information and guidance for exclusive use by local councils (clerks and councillors)
- ✔ Providing guidance on new Government legislation, for example, the Coronavirus regulations, revised Code of Conduct and the General Data Protection Act.
- ✔ An annual training programme
- ✔ Access to conferences on topics of interest to parish councils
- ✔ Working in partnership with principal authorities.

## Membership of NALC

- ✔ Specialist legal advice on complex issues
- ✔ Bulletins on legal issues, new Government policies and other matters
- ✔ Access to the NALC website
- ✔ Promoting Government support for the parish tier of local government
- ✔ Lobbying Government for changes to assist the work of local councils
- ✔ Responding to a large number of consultations from Government and Government agencies on policies and proposals that affect local councils
- ✔ Being the national 'voice' of local councils in the media, in Government and amongst Opposition political parties
- ✔ Publication of the 'Local Council Review' – available to councils and councillors.

## CALC Staff



**Samantha Bagshaw**  
Chief Officer



**Amanda McCleery**  
Parish Liaison Officer for South Lakeland and Barrow district associations



**Sonia Hutchinson**  
Parish Development Officer and Parish Liaison Officer for Carlisle and Eden district associations.



**Chris Shaw**  
Parish Liaison Officer for Allerdale and Copeland district associations



**Karen Wood**  
Administrator

## CALC Honorary Members

**President:** Cllr David Graham MBE

**Vice President:** Mr Stan Simpson

**Hon. Treasurer:** Ms Julie Hartley

## CALC Executive Committee



**Cllr Sue Castle-Clarke**  
Executive Committee Chairperson and Eden District Association Chairperson



**Cllr Bryan Craig**  
Executive Committee Vice-Chairman and Carlisle District Association Vice-Chairman



**Cllr Rick Petecki**  
Allerdale District Association Chairman



**Cllr Mike Higginbotham**  
Carlisle District Association Chairman



**Cllr Mike Cumming**  
Barrow District Association Chairman



**Cllr Oliver Dorgan**  
Copeland District Association Vice-Chairman



**Cllr Andy Pratt**  
Copeland District Association Chairman



**Cllr Jonathan Davies**  
Directly elected to Executive Committee



**Cllr Jane Tea**  
Eden District Association Vice-Chairperson



**Cllr Peter Smillie**  
South Lakeland District Association



**Cllr David Peters**  
South Lakeland District Association Chairman



**Cllr Leith Hallatsch**  
Directly elected to Executive Committee

**Cllr Roger Hart**  
Allerdale District Association Vice-Chairman

Area of Cover		Sums Insured/Limits		
		Inspire via Axa	Hiscox	Ecclesiastical
<b>Public Liability</b>		£10,000,000	£10,000,000	£10,000,000
Including	Hirers Liability	£5,000,000	£5,000,000	£2,000,000
	Libel & Slander	£500,000	£500,000	£250,000
	Motor No claims Excess & Bonus	£250 each	£250 each	n/a
<b>Employers' Liability</b>		£10,000,000	£10,000,000	£10,000,000
<b>Officials &amp; Trustees Liability</b>		£500,000	£500,000	£500,000
<b>Employee Dishonesty</b>		£150,000	£150,000	£150,000
<b>Legal Expenses</b>		£500,000	£100,000	£250,000
<b>Personal Accident</b>		£100,000/£500pw	£100,000/£500pw	£50,000/£250pw
<b>Property Damage</b>				
Including	Defibrillators & Cabinets	£5,000	£5,000	£5,000
<b>Business Interruption</b>				
Including	Loss of Revenue	£10,000	£10,000	£10,000
	Increased Cost of Working	£10,000	£10,000	£10,000
	Key Person Cover	£250pw up to max £2,500 pa	£250pw up to max £2,500 pa	£400pw up to 26 weeks
<b>Contents (away from premises)</b>		£5,000	£5,000	£5,000
<b>Money</b>		£2,500	£1,000	£1,000
<b>Internet &amp; Email</b>		£500,000	£50,000	n/a
<b>Crisis Management</b>		£500,000	£25,000	n/a

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# CUMBRIA ASSOCIATION OF LOCAL COUNCILS

## RECEIPTS & PAYMENTS ACCOUNT FOR THE YEAR ENDED 31 MARCH 2020

Receipts	2020	2019
Affiliation Fees	54,301	52,712
Sale of Publications	544	405
Sale of Local Council Review	153	238
Local Authority Grants	44,885	44,885
Training	13,486	14,748
NuGen/NWCC	-	561
Deposit Account Interest	611	602
Sundry Income/Conference	1,425	300
Transparency Website fees including website development	244	385
	<b>115,649</b>	<b>114,836</b>

### Balances at 1 April 2019

Deposit Account	32,767	32,723
Current Account	43,533	45,530
Cumberland Building Society	<b>51,914</b>	<b>51,356</b>
	<b>128,214</b>	<b>129,609</b>
	<b>243,863</b>	<b>244,445</b>

Payments	2020	2019
NALC - Affiliation Fees	19,906	19,991
Publications	703	650
NALC Local Council Review	110	176
Printing and Stationery	863	841
Travel and Subsistence	1,907	1,895
Meetings	3,495	4,801
Bank Charges	66	65
Salaries and expenses	74,050	64,711
Accountancy Fees	756	738
Honoraria	500	500
Training	8,689	10,750
Sundries	40	40
Insurance	345	705
Fingertips - Agency Costs	7,071	7,687
Conference	3,693	1,094
HR Support	-	71
Transparency Fund (CALC)	183	290
Subscriptions	660	
EDC SLA	-	1,226
	<b>123,037</b>	<b>116,231</b>

### Balances at 31 March 2020

Deposit Account	32,833	32,767
Current Account	35,534	43,533
Cumberland Building Society	<b>52,459</b>	<b>51,914</b>
	<b>120,826</b>	<b>128,214</b>
	<b>243,863</b>	<b>244,445</b>

We certify that the above Receipts and Payments Account for the year ended 31 March 2020 is correct and in accordance with the best of our information given to us and as shown by the books.

**Saint & Co Chartered Accountants, Unit 7b, Lakeland Business Park, Cockermouth, CA13 0QT**



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Cumbria Association of Local Councils (CALC) is run by local councils for the benefit of local councils. It assists local councils in their day-to-day work and represents their interests

CALC's work is paid for by the subscriptions of its member councils, together with grants from the principle authorities of Cumbria and the Lake District National Park Authority.

## **Get in touch**

Cumbria Association of Local Council

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