

The Finance & Governance Toolkit for Community and Town Councils: Getting started

This is a **quick guide** to help your council start using The Finance & Governance Toolkit for Community and Town Councils.

What the toolkit is and why your council should use it

The toolkit contains themes covering key areas of community and town council activity.

It is made up of two parts:-

Part 1 – The health check – A checklist to test whether essential governance and financial management arrangements are in place.

Part 2 – The self-assessment – A tool to help you reflect more deeply on how the council is serving the community.

Using the toolkit will help your council stay on top of your statutory responsibilities and reflect on how you are working for your community. The toolkit will help prepare the council to meet statutory responsibilities such as annual reports and audits.

How to use the toolkit

How you complete the toolkit is up to your council. For example:

- You may decide to complete the whole toolkit in a **single exercise**.
- You may decide to **work through Part 1 – The health check first**, then work through all themes in Part 2 – The self-assessment.
- You may decide to look at a **theme** in the health check, then look at **the same theme** in the self-assessment.
- You may decide to look at the themes in a **different order** to that in the toolkit, depending on where you want to prioritise attention.

Completing Part 1 – The health check

This is mainly for the clerk to complete, working with the Chair or a small group of members as appropriate.

- Choose a theme.
- For each statement, mark 'Yes' or 'No' as appropriate for your council.
- Statements shaded in blue are statutory responsibilities.
- Record any comments / actions required as appropriate alongside each statement.
- Summarise actions at the end of the theme.

Completing Part 2 – The self-assessment

This is for completion by councillors, supported by the clerk as required. You can set up a working group(s) to consider a theme(s) for reporting back to full council later.

- Choose a theme
- Councillors reflect individually on statements in the chosen theme
- Councillors meet to discuss the statements, guided by 'questions to consider' beneath the statement
- Decide whether the council could take steps to improve under that theme
- Summarise discussion and record actions.

What to do next?

- Agree priorities for action, then act on those priorities.
- Use the toolkit again at a later point to check progress.