**MISSING AGAR INFORMATION 2022**

**From:** [Objector]
**Sent:** 07 September 2022 20:18
**To:** Bleadon Parish Clerk & [All Cllrs]
**Subject:** Missing AGAR Information 2022

 Dear Councillors & Clerk,

You have recently indicated that you will not answer any further AGAR queries until after full council has met next Monday. In the meantime, you previously requested that I write to you if I had any further queries following my meeting with the Chair last week, 01 Sept 22. I have now had the opportunity to summarise and reiterate my comments in response to your email of 30 Aug 22, in **GREEN**below. I hope that BPC will take the time to discuss the issues raised by residents and me, and address and resolve them as soon as possible

As previously discussed, I will be writing to the External Auditor to raise my Governance and Accountability concerns and queries, as they have not been fully addressed via this AGAR process.

Kind regards,

[Objector]

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Subject: Fw: Request for AGAR viewing

Dear [Clerk],

I note from the website that the new AGAR Notice has been posted, before 27th July 22, and that you appear to have overlooked informing me, as requested in my previous email below. (Thank you for now including the additional two page summary of public rights on the AGAR Notice as requested)

Please can you therefore offer me a few dates and times, at the soonest opportunity in the next two weeks, for me to attend and inspect the AGAR records.

I also note that you have now published the full, signed AGAR Form 3. As confirmed with the External Auditor, please can you ensure that my simple request to inspect all AGAR related documentation is undertaken, in particular but not limited to (and complying with your request for no distinguishing emboldening or italics):

1.    Please send me the last five years full Internal Auditor's biannual reports, in particular that referenced in the AGAR Form 3 pg3, dated 13/02/22 and 11/06/22”

*I have attached the last two year’s final reports*

**You have attached 31/05/21 and 20/02/22. Assuming the 20/02/22 report is correct for 13/02/22, please send me this year’s bi-annual 11 June 22 Internal Audit Report as requested. (See attached Financial Concerns document)**

2.    Please send me the last five years full External Auditor's reports13/02/22 and 11/06/22

*They can be located within the AGARs posted on the website*

**if you cannot send me the original full report, please explain why not (See attached Financial Concerns document)**

3.    Please send me a fully itemised breakdown of the summarised 'Annual Budget by Centre', i.e. income and expenditure for each and every line item, to understand what has been spent per activity/project/heading/cost code.

Attached

**This was not attached, only the usual format for previous year’s quarterly reports. Please send me a copy.**

I assume Full Council has monthly access to this information for 'effective financial management during the year' (AGAR Section 1) and as indicated in BPC's Risk Register. If not, as BPC is now apparently fully electronic, I assume a sub-report of this nature should not be onerous or time consuming as the quarterly reports are a summary of each individual income or expenditure entry.

*Yes*

**At the 01 Sept 22 AGAR viewing, Cllr Hemingway confirmed your statement, agreeing that she received a monthly full itemised breakdown of income and expenditure for each and every individual line item. Please see**[**Locking Parish Council**](http://www.lockingpc.co.uk/_UserFiles/Files/_Other/144810-8a_SIGNED_Payments__and__Receipts_21.04.22_to_18.05.22.pdf)**website for their publicly accessible itemised financial information, as attached – this is the type of report I’m looking for, linking individual invoice numbers to individual budget cost code, as confirmed exists by the clerk and Chair above. (See attached Financial Concerns document)**

4.    Please send me a fully itemised income and expenditure listing for each Reserve listed in the 'Summary Receipts and Payments' report.

*Attached*

**This was not attached. The report attached only indicates start and end EMR values listed not individual expenditure, with additional errors (See attached Financial Concerns document)**

5.    Please send me the Asset register as submitted to Audit (AGAR pg 3 H, and Section 2)

*Attached*

**This was not attached**

a.    Following previous correspondence, please can someone tell me why the [current BPC online June 2020 Asset Register](https://www.bleadonparishcouncil.co.uk/content/large/documents/policies_%26_terms_of_reference/asset-register-june-2020.pdf) has the Coronation Hall listed as a BPC asset, not indicated as in Custodial Trusteeship, and for a value of £1million not 'nil' as residents were previously informed. Also, why BPC assets value is listed at June 2020 as £1.1 million on the register, a different value of £860K in Section 2

*Because that was how it was listed  at the time*

**This answer does not explain, when and how an asset held in trust for the residents of Bleadon (the Halls) previously listed as ‘nil’ value to BPC, became listed as a £1.1 million BPC asset? Nor why the values are different (See attached Trust and Grants document & Financial Concerns document)**

6.    A 'Summary Receipts & Payments' report has been supplied but not published (e.g. potentially related to AGAR pg3 D) to discuss the purpose of the individual Reserves that were held, e.g. General £13.5K, Special £9.5K, Contingency £19K, A370 £1K

*I have published what is required*

**The purpose of the reserves has not yet been explained, as at the AGAR viewing Cllr Hemingway instructed me to send my questions to the clerk (see 01 September 2022 AGAR Viewing  email (See attached Financial Concerns document))**

7.    All signed minutes, including all associated precept and full budget setting appendices/papers used for councillor's decision making and outcomes, which also includes setting for 2022/23 period in January (e.g. potentially related to AGAR pg3 D)

*During your inspections visits the signed minutes were available to view and are of course on the website*

**As you are aware, the appendices/paper/reports are not attached to the signed minutes, nor are they published with the agenda or minutes on the BPC website. (See attached Financial Concerns document)**

8.    The dates of all finance working group/meetings relating to, and held in, 2021-22 (potentially relating to Section 1), and any associated documentation

*Any such working group meetings took place on an “ad hoc” basis the planning group being a good example. This process was agreed on the recommendation of the Personnel Committee in order not to increase unnecessarily the Clerk’s working hours.*

**Where is this agreed Personnel Committee recommendation minuted? What dates did these ad hoc finance meetings take place?**

a.    As BPC website doesn't publish detailed/itemised information on the individual budgets set for Staff, Grants, Administration, Open Spaces or Projects, where are these budgets stated and agreed by full council? Where are they transparently published to the public?

*The Parish Council Website does record through its minutes the decisions made in regard  to both the Parish Council Budget and Precept*

**My question is unanswered, where, when and how do the minutes state the individual line item budgets set, e.g. Platinum Jubilee, etc.? (See attached Financial Concerns document)**

9.    All receipts (e.g. potentially related AGAR pg 3 J). From BPC's Risk Register I understand that 'Scanned invoices are sent to signatories for online payments'.

*You have at the time of your inspections had the availability to view all the receipts and yes on the advice of the internal auditor during lockdown that was the accepted process which has been followed since*

**During lockdown BPC posted an AGAR Notice to view the records but did not offer an AGAR viewing meeting, nor did it supply all the information requested at the time electronically (See attached Financial Concerns document)**

10.   Documentation indicating which Trustee roles are included in AGAR pg 3 O, and Section 1

*The Charity Return was available at the time of your inspection*

**Why only one BPC Charity Return? As far as I’m aware BPC is Trustee of the Children’s Play Area and Equipment, as well as the Coronation & Jubilee Halls Custodial Trustee and Youth Centre land Custodial Trustee and car park. (See attached Trusts and Grants document)**

11.   All signed contracts, at a minimum those published as unsigned on the BPC Policies page i.e. Grass Cutting, Ranger, Toilets, Editor

*Please refer to the website*

**The online Editor contract is still not signed. BPC hold many contracts from mobile phone to web provider, not just the four on the BPC website. (See attached Financial Concerns document).**

a.    also, any documentation regarding how the signed contracts are monitored and enforced

*The Village Ranger provides a monthly report which is available to the council at any time.*

**Is the Village Ranger the only contract that is monitored and enforced? (See attached Financial Concerns document)**

12.   Signed [Youth Club Lease](https://www.bleadonparishcouncil.co.uk/content/large/documents/leases/youth_club_lease%5B21694%5D.pdf) (as now posted on the BPC website, thank you),

a.    to discuss why the lease was minuted as signed and concluded at Full Council in May 21, yet has an altered uniitialled Jan 22 date, and doesn't seem to have been mentioned in any full council minutes post May 21. When did councillors approve this amended version?

*My explanation for the absence of a signed copy was given to the Council on several occasions. The Senior Partner sold his practice which apparently caused the delay.*

**I have not been given the reason for the Lease to be resigned Jan 22, after the Lease was publicly and officially declared signed and concluded in May 21 (See attached Financial Concerns document)**

b.    Please make the associated full council signed minutes available, along with any associated appendices/papers referring to this (thank you for now posting Jan 22 minutes on the BPC website).

*Please see my response to Q.7*

**See my note above**

c.    Please also make available a copy of the previous lease, which presumably expired Nov 18 but not concluded until Jan 2022, in the current AGAR period.

*I not hade time to source that document*

**Does the clerk not have copies of all signed agreements, leases, contracts, etc. in order to manage, monitor and enforce them, on behalf of councillors? (See attached Financial Concerns document)**

13.   Q4 'Annual Budget by Centre' ending 31 March 2022, (thank you for copy) to discuss anomalies, especially as the information relating to the AGAR period has been removed from the BPC website, i.e. Q1, Q2, Q3 & Q4 2021-22, and that Q1 of this financial year has removed even more financial information.

*If there is anything specific please advise me accordingly*

**Please publish the quarterly reports in the Q4/Final-2021/22 format as was previous practice. Also see attached Financial Concerns document for Village News Advertising and Platinum Jubilee examples.**

If any of the requested information will be absent prior to, or at, the arranged AGAR viewing meeting, please explain why, so that I can discuss it further with the External Auditor.

From your recent correspondence, you indicate that all decisions and expenditure go through an open and transparent democratic voting process at Full Council, via all councillors, including the compilation and sign off of the AGAR Form 3. I therefore expect whoever attends my requested AGAR inspection meeting as Bleadon Parish Council's representative, to understand and update me on your previous AGAR response dated 25 July 22, and to be able to discuss and fully answer my AGAR related queries.

*I understand that you attended last week’s inspection overseen by the Chairman.*

**This was a ‘group’ viewing with five other residents/councillors, where information was still missing and unable to be inspected. The attending Chairman could not answer specific questions asked by residents, and advised us to contact you again. My meeting with Cllr Hemingway on 01 September did not address my concerns.**

*I was surprised to hear that Cllrs Mrs I D Clarke and Mrs M Sheppard also attended although they did not respond at the time from my request  for  a volunteering Councillor.*

**As you are aware Cllr Sheppard and Cllr Clarke have attended previous AGAR viewings, they were unable to answer some of my key queries and so I believe were looking for answers as residents, as well as attending to potentially assist the Chairman in what was originally organised to be a one-to-one meeting with a resident, which ended up being with four frustrated residents instead.**

What I did understand that had transpired was a discussion as to my level of remuneration and  hours of work.

**This was not asked by me**

*Whilst it was totally inappropriate*

**I do not agree that the question of the clerk's hours, duties and salary was ‘totally inappropriate’. The question related to the purpose of the increase with reference to the previous clerk’s duties and salary. However, it raised further questions as to how a SCP21 clerk post on 01 Sept 19, became a SCP39 post by 01 Mar 20 six months later. Since 14 Jun 21 the current clerk is undertaking the same 18 hours as the previous clerk, to presumably do the same work. This cannot be confirmed without related documentation that the resident was requesting.**

**I believe that Staff costs are an appropriate AGAR discussion as this year 2022/23 they were budgeted to be £25K (40%) of a £65K total BPC Budget, not including any itemised admin costs included in the £13K Administration Budget (20%). The remaining budget £25K (40%) being solely for Open Spaces, which now has no dedicated Open Spaces Committee. No Grants and No Projects budgets are listed (See Budget).**

*the same two councillors could have advised those who were inspecting the accounts that they were at the meeting of the Personnel Committee when they increased my hours from 14 per week to 18.*

**These Personnel Committee minutes with public reasoning have not been published.**

If you still wish to inspect the books for a third time will you please make any necessary arrangements with the Chairman

**I’ve been unable to fully inspect the books at any of my AGAR viewings due to missing information, anomalies and unclear answers to my questions.**

*Thank you*

Kind regards,

[Objector]

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**From:** [BPC Chair]
**Sent:** 30 August 2022 22:36
**To:** [Objector]

**Cc:** [All Cllrs & Clerk]

**Subject:** RE: Request for AGAR viewing

Hi [Clerk and Objector]

I am free Wednesday and Thursday evening from 7:45 to 8:45 this week.  Please can you make the arrangements.

Best wishes

[BPC Chair]

**From:** [Objector]
**Sent:** 30 August 2022 13:39
**To:** [BPC Chair]
**Cc:** [All Cllrs & Clerk]
**Subject:** Re: Request for AGAR viewing

Hi,

Thanks for getting back to me so promptly.

I'm happy to meet any evening this week. Please ask the clerk to arrange a meeting and please bring along the files.

Kind regards,

[Objector]

**From:** [BPC Chair]
**Sent:** 30 August 2022 13:06
**To:** [Objector]
**Cc:** [All Cllrs & Clerk]
**Subject:** Re: Request for AGAR viewing

Dear [Objector]

I have the same files I had last time and we have not had a council meeting since so I am not sure what I can add to the comprehensive answers given by the clerk.

But happy to meet you one evening if the clerk can arrange it.

Best wishes

[BPC Chair]

Please excuse my brevity I am out and about so I have sent this from my phone.

On 30 Aug 2022, at 12:52, Bleadon BOB Community Website <bleadon@live.co.uk> wrote:

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Dear [Clerk],

If I have any further questions following the meeting, I will direct them to you as requested.

Kind regards,

[Objector]

**From:** [Clerk]
**Sent:** 30 August 2022 12:29
**To:** [Objector & BPC Chair]
**Cc:** [All Cllrs & SBA]
**Subject:** RE: Request for AGAR viewing

[Objector]

If you have any further questions please direct to me. As far as I am aware I have answered the questions put to me in your e-mails.. I am most certainly not aware of any group questions.

[Clerk]

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**From:** [Objector]
**Sent:** 30 August 2022 11:15
**To:** [BPC Chair]
**Cc:** [All Cllrs, Clerk & SBA]
**Subject:** Fw: Request for AGAR viewing

Dear [BPC Chair] (BPC Chair),

The RFO/Proper Officer/Clerk has asked that I contact you to arrange another meeting to resolve these AGAR queries.

This official response from BPC's RFO still has not clearly or fully answered the questions put to Council, with information still missing from the 'group' AGAR viewing last week (where attending current and former councillors were unable to answer key questions) and in the responses below.

I believe that this is a simple issue of either a lack of understanding on my/residents' behalf, or a lack of communication and transparency by that of the council.

The clerk clearly believes that all my/residents' queries have been fully answered to councillors' and residents' understanding. Therefore, all councillors should be able to resolve this matter by fully answering my questions at the meeting, without being asked by the attending councillor to write to the clerk again. If my questions are not fully answered I will raise my concerns with the External Auditor, according to the AGAR process.

Please arrange another viewing with a councillor(s) who can answer the questions asked over the12-week AGAR viewings. As the current AGAR period finishes next week, I'll endeavour to make myself available any days or times offered this week.

Kind regards,

[Objector]

**From:** [Clerk]
**Sent:** 30 August 2022 09:50
**To:** [Objector]

**Cc:** [Allr Cllrs & SBA]

**Subject:** RE: Request for AGAR viewing

Dear [Objector]

Please my responses where I am able to your questions

**From:** [Objector]
**Sent:** 09 August 2022 10:11
**To:** [Clerk]
**Cc:** [All Cllrs]
**Subject:** Fw: Request for AGAR viewing

Dear [Clerk],

I note from the website that the new [AGAR Notice](https://www.bleadonparishcouncil.co.uk/content/large/documents/notices/2022/public_right_of_inspection_-_bpc-2022-23_v2.pdf) has been posted, before 27th July 22, and that you appear to have overlooked informing me, as requested in my previous email below. (Thank you for now including the additional two page summary of public rights on the AGAR Notice as requested)

Please can you therefore offer me a few dates and times, at the soonest opportunity in the next two weeks, for me to attend and inspect the AGAR records.

I also note that you have now published the full, signed [AGAR Form 3](https://www.bleadonparishcouncil.co.uk/content/large/documents/reports/2022/agar_2022_-_final%5B21663%5D.pdf). As confirmed with the External Auditor, please can you ensure that my simple request to inspect all AGAR related documentation is undertaken, in particular but not limited to (and complying with your request for no distinguishing emboldening or italics):Please send me the last five years full Internal Auditor's biannual reports, in particular that referenced in the AGAR Form 3 pg3, dated

1. Please send me the last five years full External Auditor's reports13/02/22 and 11/06/22

*I have attached the last two year’s final reports*

1.

*They can be located within the AGARs posted on the website*

1. Please send me a fully itemised breakdown of the summarised 'Annual Budget by Centre', i.e. income and expenditure for each and every line item, to understand what has been spent per activity/project/heading/cost code.

Attached

* 1. I assume Full Council has monthly access to this information for 'effective financial management during the year' (AGAR Section 1) and as indicated in BPC's Risk Register. If not, as BPC is now apparently fully electronic, I assume a sub-report of this nature should not be onerous or time consuming as the quarterly reports are a summary of each individual income or expenditure entry.

*Yes*

1. Please send me a fully itemised income and expenditure listing for each Reserve listed in the 'Summary Receipts and Payments' report.

*Attached*

1. Please send me the Asset register as submitted to Audit (AGAR pg 3 H, and Section 2)

*Attached*

* 1. Following previous correspondence, please can someone tell me why the [current BPC online June 2020 Asset Register](https://www.bleadonparishcouncil.co.uk/content/large/documents/policies_%26_terms_of_reference/asset-register-june-2020.pdf) has the Coronation Hall listed as a BPC asset, not indicated as in Custodial Trusteeship, and for a value of £1million not 'nil' as residents were previously informed. Also, why BPC assets value is listed at June 2020 as £1.1 million on the register, a different value of £860K in Section 2

*Because that was how it was listed  at the time*

1. A 'Summary Receipts & Payments' report has been supplied but not published (e.g. potentially related to AGAR pg3 D) to discuss the purpose of the individual Reserves that were held, e.g. General £13.5K, Special £9.5K, Contingency £19K, A370 £1K

*I have published what is required*

1. All signed minutes, including all associated precept and full budget setting appendices/papers used for councillor's decision making and outcomes, which also includes setting for 2022/23 period in January (e.g. potentially related to AGAR pg3 D)

*During your inspections visits the signed minutes were available to view and are of course on the website*

1. The dates of all finance working group/meetings relating to, and held in, 2021-22 (potentially relating to Section 1), and any associated documentation

*Any such working group meetings took place on an “ad hoc” basis the planning group being a good example. This process was agreed on the recommendation of the Personnel Committee in order not to increase unnecessarily the Clerk’s working hours.*

* 1. As BPC website doesn't publish detailed/itemised information on the individual [budgets](https://www.bleadonparishcouncil.co.uk/content/large/documents/finance/2022-23/budget_2022-2033.pdf) set for Staff, Grants, Administration, Open Spaces or Projects, where are these budgets stated and agreed by full council? Where are they transparently published to the public?

*The Parish Council Website does record through its minutes the decisions made in regard  to both the Parish Council Budget and Precept*

1. All receipts (e.g. potentially related AGAR pg 3 J). From BPC's Risk Register I understand that 'Scanned invoices are sent to signatories for online payments'.

*You have at the time of your inspections had the availability to view all the receipts and yes on the advice of the internal auditor during lockdown that was the accepted process which has been followed since*

1. Documentation indicating which Trustee roles are included in AGAR pg 3 O, and Section 1

*The Charity Return was available at the time of your inspection*

1. All signed contracts, at a minimum those published as unsigned on the BPC Policies page i.e. Grass Cutting, Ranger, Toilets, Editor

*Please refer to the website*

* 1. also, any documentation regarding how the signed contracts are monitored and enforced

*The Village Ranger provides a monthly report which is available to the council at any time.*

1. Signed [Youth Club Lease](https://www.bleadonparishcouncil.co.uk/content/large/documents/leases/youth_club_lease%5B21694%5D.pdf) (as now posted on the BPC website, thank you),
	1. to discuss why the lease was minuted as signed and concluded at Full Council in May 21, yet has an altered uniitialled Jan 22 date, and doesn't seem to have been mentioned in any full council minutes post May 21. When did councillors approve this amended version?

*My explanation for the absence of a signed copy was given to the Council on several occasions. The Senior Partner sold his practice which apparently caused the delay.*

* 1. Please make the associated full council signed minutes available, along with any associated appendices/papers referring to this (thank you for now posting Jan 22 minutes on the BPC website).

*Please see my response to Q.7*

* 1. Please also make available a copy of the previous lease, which presumably expired Nov 18 but not concluded until Jan 2022, in the current AGAR period.

*I not hade time to source that document*

1. Q4 'Annual Budget by Centre' ending 31 March 2022, (thank you for copy) to discuss anomalies, especially as the information relating to the AGAR period has been removed from the BPC website, i.e. Q1, Q2, Q3 & Q4 2021-22, and that [Q1 of this financial year](https://www.bleadonparishcouncil.co.uk/content/large/documents/finance/2022-23/budget_-_2022-23_-_1st_qtr.pdf) has removed even more financial information.

*If there is anything specific please advise me accordingly*

If any of the requested information will be absent prior to, or at, the arranged AGAR viewing meeting, please explain why, so that I can discuss it further with the External Auditor.

From your recent correspondence, you indicate that all decisions and expenditure go through an open and transparent democratic voting process at Full Council, via all councillors, including the compilation and sign off of the AGAR Form 3. I therefore expect whoever attends my requested AGAR inspection meeting as Bleadon Parish Council's representative, to understand and update me on your previous AGAR response dated 25 July 22, and to be able to discuss and fully answer my AGAR related queries.

*I understand that you attended last week’s inspection overseen by the Chairman. I was surprised to hear that Cllrs Mrs I D Clarke and Mrs M Sheppard also attended although they did not respond at the time from my request  for  a volunteering Councillor. What I did understand that had transpired was a discussion as to my level of remuneration and  hours of work. Whilst it was totally inappropriate the same two councillors could have advised those who were inspecting the accounts that they were at the meeting of the Personnel Committee when they increased my hours from 14 per week to 18.*

*If you still wish to inspect the books for a third time will you please make any necessary arrangements with the Chairman*

*Thank you*

Kind regards,

[Objector]

**From:** [Clerk]

**Sent:** 25 July 2022 10:31
**To:** [Objector]

**Cc:** [SBA & All Cllrs]
**Subject:** RE: Request for AGAR viewing

Dear [Objector]

I am aware thank you of the request that has been set out by  the external auditor and will take the appropriate action as soon as I am able.

Might I ask please that you desist in your practice of giving me on all occasions “chapter and verse” especially as it is often embolden and in  italics when in fact a simple request will suffice.

Thank you

[Clerk]

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**From:** [Objector]
**Sent:** 22 July 2022 20:49
**To:** [Clerk]
**Cc:** [All Cllrs]
**Subject:** Request for AGAR viewing

Dear [Clerk],

Yesterday, 21 July 22, the External Auditor responded to me, and other interested residents, stating that they had,

"*... written to the Council about the need to restart the public rights period since the approved AGAR has not been published on the website. Members of the public will therefore have the opportunity to inspect the accounting records and ask questions of the clerk for a further 6 weeks. If any concerns remain after the Council has responded to queries, electors may wish to consider raising objections to the AGAR with the appointed auditor*."

I am therefore requesting that you inform me when the new AGAR Notice is posted, with the new six week viewing period, so that I can book a date and time to see the full AGAR documentation. If I have misunderstood anything, please let me know.

Kind regards,

[Objector]