Proposal to Oakham Town Council

Policy Review and Update Services

September 2026

Oakham Town Council

Policy Review and Update: Scope and Fee Estimate

1. Purpose

Oakham Town Council has asked for its published policies and procedures to be reviewed and updated, with recommended amendments produced for each. This document sets out the scope, approach, and an estimated time and fee for that work. HR policies are excluded from this exercise, as noted below.

2. Scope

The review covers every policy, procedure, protocol, and terms of reference currently published on the Council's website, with the following exclusions:

- Anti-Harassment and Bullying Policy
- Capability Policy
- Disciplinary Policy
- Drug and Alcohol Abuse Policy
- Employee Privacy Notice Policy
- Equal Opportunities Policy Statement and Procedure
- Grievance Procedure (Employees)
- Grievance Procedure (Town Clerk)
- Managing Stress in the Workplace
- Sexual and General Harassment Policy & Procedure
- Sickness Absence Policy (Guidance for Managers)
- Staff Appraisal Policy

This leaves 30 documents in scope for this exercise, plus the Strategic Plan, which is addressed separately at section 6.

3. Approach

Each document will be reviewed against current legislation, statutory guidance, and recognised model policies (NALC/LRALC where applicable), and rewritten or amended where it is out of date, unclear, or inconsistent with good practice.

Critically, every updated document will be checked for consistency with the Council's Standing Orders, Financial Regulations, and Scheme of Delegation, so that recommended changes do not create internal conflicts, for example between a policy's authorisation limits and the levels set out in the Financial Regulations or Scheme of Delegation.

The current published copy of the Scheme of Delegation was not found on the Council's policies and procedures page. A current copy will be needed from the Council before this work begins, so that all documents can be checked against it.

4. Time allocation and fee estimate

Tier / documents	Count	Est. time each	Est. total hrs
Tier A: Terms of Reference and guidance notes	8	30-45 mins	4-6
Tier B: Standard policies and protocols	20	1-1.5 hrs	20-30
Tier C: Standing Orders and Financial Regulations	2	2.5-3 hrs	5-6
Baseline review (current Standing Orders, Financial Regs, Scheme of Delegation)	-	-	2-3
Final cross-reference and consistency pass	-	-	2-3

Estimated total	**33-48 hrs**

At [redacted]'s standard day rate of £400 per day (pro rata by the hour), this equates to approximately 4.5-6.5 working days of work (based on a 7.5-hour day). This includes pension, holiday pay and Employer's National Insurance which is paid to the consultant through [redacted] Payroll.

The total estimated fee: 4.5-6.5 days × £400 /day - £1800 - £2600

[redacted] fees are plus expenses, employer's national insurance and VAT.

Expenses, if required – car travel is recharged at the HMRC Approved Mileage Rate, currently 55p per mile or standard class train travel at cost. We do anticipate though, at this stage, that this assignment will be delivered entirely remotely. Employer's national insurance is recharged at the notional rate of 12% of the hourly rate but is subject to change if the rate charged by HMRC to [redacted] alters.

5. Document-by-document breakdown

Tier A = Terms of Reference / guidance notes (light-touch review). Tier B = standard policies (full review and redraft). Tier C = Standing Orders and Financial Regulations (extended review, given their role as the reference point for every other document).

Document	Current next review	Tier
Code of Conduct	Dec 2027	B
Complaints Procedure	Jan 2027	B
Communications Policy (v2)	Mar 2028	B
Councillor Email Policy	Mar 2032	B
Councillor Submission Guide for Meeting Papers	Sept 2032	A
Data Mapping Register	Jul 2028	B
Data Protection Policy	Jan 2027	B

Document	Current next review	Tier
Financial Regulations	Oct 2026	C
Finance Committee Terms of Reference	Jul 2029	A
Flag Flying Policy	Jan 2032	B
Grants Policy	Apr 2030	B
Grit Bins Policy	Jan 2030	B
Guide to Freedom of Information Act	Guidance (undated)	A
Health and Safety Policy	Jan 2028	B
Model Publication Scheme	Apr 2030	A
I.T. and Data Management Policy	Jul 2029	B
Neighbourhood Plan Steering Group Terms of Reference	Information only	A
Parks and Open Spaces Hire Policy	Apr 2028	B
Protocol on Recording	Apr 2030	B
Protocol on Councillor/Officer Relationships	Apr 2030	B
Recreation and Planning Committee Terms of Reference	Apr 2030	A
Retention and Disposal Policy	Jan 2028	B
Risk Assessment	Jul 2027	B
Staffing Committee Terms of Reference	Apr 2030	A
Standing Orders	Sept 2026	C
Systems of Internal Control	Jul 2026	B
The Local Government Transparency Code	Apr 2030	B
UK Town of Culture (2028) Terms of Reference	Not stated	A
Urgent Decision Protocol	Sept 2032	B
Vexatious Complaints Procedure	Apr 2030	B

6. Excluded from this estimate

The Strategic Plan lapsed in 2025 (previously valid 2019 to 2025). Refreshing it is a different kind of exercise, requiring member input on priorities rather than a policy tidy-up, and is best scoped and quoted separately once Council has confirmed it wants to proceed.

7. Points to confirm with the Council before starting

- A current copy of the Scheme of Delegation, as this is not published alongside the other policies.

- Confirmation that Health and Safety Policy should sit in this batch of work rather than being held back with the HR policies, given it also covers premises and public safety.
- Whether Council wants draft amendments brought back in stages (by tier, or by committee) or as a single batch at the end.
- The format Council would like recommended changes presented in, for example tracked changes on the existing document, or a summary of changes with a clean redraft.

8. Proposed timeline

Subject to confirmation of the points above and receipt of the Scheme of Delegation, the review can be delivered in stages: Tier C and the baseline review first (as these set the reference points for everything else), followed by Tier B policies grouped by theme (finance and governance, data and IT, operational), with Tier A items completed alongside. A full first-draft set could reasonably be delivered within 3-4 weeks of starting, depending on other commitments and turnaround time for Council sign-off at each stage.

9. Background of the [redacted] Partner who is available to undertake the assignment

[redacted], BA Law (Hons), LLM Legal Research, PGD Legal Practice

[redacted] is a highly experienced CiLCA-qualified Local Council Clerk and RFO, experienced in providing strategic leadership to councils and professional and policy advice to elected Members of all parties.

She is a legally-trained Chief Executive with a strong track record in leading teams, providing inspirational leadership for staff, managing complex projects, ensuring robust governance, day-to-day operations, long-term planning, financial stewardship, and stakeholder relationships. In doing so, she has a track record of to ensure growth of Council services, profile and first-class service delivery.

Her relevant experience includes:

- Ensuring compliance with the local government legal framework and financial regulations. Internal and external annual audits, budget planning and monitoring, income generation and tax implications, payroll. Forward planning and grant applications for Council projects.
- Managing and operating Council offices, overseeing tender processes, contracts, insurances, compliant health and safety practices and the management of teams of up to 17 staff members. Recruitment at all levels of seniority.
- Bid writing, receipt and audit of grant funding for large scale projects.
- Writing, maintaining and executing the portfolio of policies and ensuring procedural compliance. Data control and compliance with GDPR requirements.
- Administration and regulatory compliance for a large charitable trust; responsibility for ensuring the Charity Commission is updated each year and that the Trustees are meeting their fiduciary duties.
- Democratic services including publication of agenda, organising meetings/ attendees, taking minutes and producing monthly Clerk's and Finance reports demonstrating spend against budget and forecasting. Reports on the various activities of the Council as required.

[redacted] also has expertise in organisational development, restructure, and is an excellent people manager at all levels. She also has significant senior level operations, events, PR and management experience in the private sector prior to her career developing into local council senior management.

[redacted] holds a Diploma in Art, History and Italian, a BA (Hons) Law Degree from the University of Wales, the LLM in Legal Research, a Post-graduate Diploma in Legal Practice and the Certificate in Local Council Administration [CiLCA].

10. Progression

We will be very happy to discuss any aspect of the project and further refine the approach as necessary. Please contact [redacted] or [redacted] on [redacted] or [redacted]. On approval of this proposal, [redacted] will draw up a contract to reflect the agreed terms for your review, signature and return.