

POLICY: Creation, Revision and Review of Documents

PURPOSE: To provide consistent format and control of documents

SCOPE: All documents related to Melbourn Parish Council business that require regular and formal approval

POLICY:**1. Numbering and Format**

- 1.1 Each Policy, Procedure or other document type will be assigned a unique number, to be shown on every page, together with a review date
- 1.2 The Indexing System for all Parish Council documents within the scope of this policy will reflect the assigned document number
- 1.3 Unless a good reason exists, due to the particular nature of a document (e.g. an Application Form), the textual content should normally be preceded by a statement of both Purpose and Scope, as in this policy
- 1.4 The Review Date, shown on each page of the document, refers to the latest date for review or revision. Document review will be normally set at a **three year interval but can be varied depending on prevailing needs.**
- 1.5 Each page will also carry the Version Number of the document. This refers to the sequential edition of the unique document concerned and is there to prevent confusion, for example should the document be revised and reissued more than once before a pre-planned regular review date (e.g. an Annual **or Monthly Council Meeting**)
- 1.6 All document pages, including the title page, will be numbered
- 1.7 Within documents section and paragraph numbering is recommended wherever possible, as in this Policy, to make review and reference as easy as possible. Alternative presentations are acceptable provided document clarity is not compromised
- 1.8 It is recommended that all documents be created in Arial Font, using font sizes that broadly follow this reference policy
- 1.9 Documents will carry a Header and Footer on each page confirming these refer to Melbourn Parish Council, also to facilitate carrying other repetitive information

The approval signature(s) and approval date will always be located on the **last page** of every document, so that it is always clear that no pages are missing. The last page will also show the time period or policy for the next planned review

2. Document Type - The Document Title for all documents must accurately reflect their purpose.

Note: It is acceptable for a Document Title to reflect more than one document type in the title, for example '**Policy and Procedure: Grievance**'. In such cases the document structure should clearly show separation between 'policy' and 'procedure'

Examples are:

- *Policy* – Policies are documents that set out the guidelines and rules governing the subject matter concerned
- *Procedure* – Procedures are documents that list the steps required to accomplish a certain goal or goals
- *Terms of Reference* – Terms of Reference are documents that set out the scope and limits of responsibility for a person or working group

This is not an exhaustive list

3. **Responsibilities, Review and Approval**

- 3.1 All documents carry a latest Review Date (Month/Year) on all pages, together with the assigned Document Number (paragraphs 1.1 and 1.4 above)
- 3.2 It is the responsibility of the Parish Council, through the Chair, to ensure that all new documents are created within the scope of this policy and approved as per paragraphs 3.5 and 3.6 below
- 3.3 It is the responsibility of the Parish Council, through the Chair, to ensure that all pre-existing documents covered by the scope of this policy are reviewed on or before their policy Review Date and approved as per paragraph 3.5 below
- 3.4 Persons reviewing documents should do so by reference to **Appendix A**
- 3.5 It is the responsibility of the Clerk to keep abreast of changes to legislation, government and/or other guidance and to bring such changes to the attention of the Council and its various sub-committees. The Clerk will also monitor the expiry dates of documents and bring them forward for review in a timely fashion. Where appropriate the Clerk will support document creation/update.
- 3.6 It is the responsibility of the Chair of the Council, together with the chairs of council sub-committees, to update documents if so advised by the Clerk. The draft document will be offered for formal approval to the Full Council when work is complete. The review and approval process will normally follow the outline procedure in **Appendix B**, but can be flexible depending on circumstances
- 3.7 Subject to amendments that may be requested and agreed by the Full Council, the final draft will be signed and approved at a public meeting by the Chair of the Parish Council.

APPENDIX A

Document Review – Prompt Questions

When reviewing any document the following questions can be used to ensure the result is effective:

- Is the document required?
- When was it last reviewed?
- Should the frequency of review be amended?
- Does the document follow the consistent format as laid down in this policy?
- Is the Document Title clear and does it properly define Purpose and Scope?
- If it is a Policy, does it provide clear direction on the implementation of rules and regulations through associated Procedures?
- If it is a Procedure, does it offer a clear and unambiguous series of steps from which users can resolve questions and problems?
- Does the content accurately reflect what is required or what actually happens?
- Have there been incidents or problems since the last routine review that could prompt amendments to the document?
- Does the final document properly reflect obligations on Equal Opportunities for those affected
- Is the document consistent with and does it further the vision and aims of Melbourn Parish Council
- Will training or re-training of councillors or staff be required after the document is re-issued?

APPENDIX B

Document Creation and Review – Recommended Outline Process

1. Document creation and/or review will normally be assigned to a working group set up for the purpose.
2. After creation of either the first draft of a new document or first review of an existing document the writer/reviewer will (a) assign a new version number (b) circulate the document to the working group with a request for comments.
3. Comments may be made through a meeting discussion or via email (recommended). If email comments are requested the writer will set a deadline date after which it will be assumed all comments have been received. 'Silence is assent'.
4. The writer/reviewer will change the document according to comments received and assign it a new version number. The document will be again circulated to the work group for comments by a set deadline date, or discussed at a group meeting.
5. Subject to outline group approval the draft document will be circulated to the Full Council (if necessary again with a updated version number). The circulation will be by email and will carry a deadline date after which it will be assumed all councillors have either commented or are satisfied. Silence is assent.
6. The next latest review date will be proposed as part of the approval process. This may vary between documents and document types
7. The writer, on behalf of the Work Group, will make final amendments to the draft if needed and offer it to a public meeting of the Full Council for approval and signature.

Document Approval:

(Chair to Melbourn Parish Council)

Date of Parish Council Meeting:

Document Review Policy: 3 Years from last approval