Background

Following the Reorganisation Order confirming the merger of Balsall Parish Council and Berkswell Parish Council, with elections scheduled for May 2027, WALC is pleased to offer a comprehensive organisational review to support a smooth transition to the new council.

Scope of Work

Phase 1: Initiation & Data Gathering (Jul–Sept 2026)

- Establish joint working group and agree terms of reference – already a working group in place so reaffirm this with each council
- Collect and review governance documents, staffing information, financial records, asset registers, contracts, and policies from both councils
- Staffing review including TUPE
- Meeting with Clerks and Chairs

Phase 2: Analysis & Options (Sep 2026)

- Comparative analysis of both councils' structures, services, and operations
- Financial modelling and precept projections for 2027–28
- Gap analysis against sector best practice
- Risk register development
- Governance options for new council (Standing Orders, Financial Regulations, scheme of delegation, code of conduct, committee structure and ToRs)

Phase 3: Recommendations & Report (Oct 2026)

- Detailed options paper with costed recommendations
- Staffing structure proposal
    - Review of existing staffing structure
    - Job descriptions
    - Pay scales

- Office arrangements
- Future staffing requirements

- Policy schedule
- Draft budget framework
- Report to working groups/full councils

Phase 4: Transition Support (Nov 2026–Apr 2027)

- Support with precept submission
- Advice on contract novation, IT migration, communications
- Template policies and governance documents
- Councillor induction pack for new council
- Attendance at up to two working group meetings during transition
- Dissolution of both councils on the 31st March – meeting guidance and support
- Merger / new council forms on 1st April – meeting guidance and support
- Telephone and email support throughout

Deliverables

1. Baseline report on both councils
2. Gap analysis and risk register
3. Staffing options appraisal
4. Recommended governance structure
5. Harmonised policy checklist
6. Implementation roadmap with milestones
7. Day-1 readiness checklist

Project Management

Project Management - WALC will act as project facilitator throughout the review, ensuring progress is monitored against agreed milestones. A Project Plan will be maintained and regular updates provided to the joint working group.

Meetings & Support

Activity	**Included**
Initial briefing meeting	1
Working group meetings	Up to 4
Presentation of final report	1
Reasonable Telephone and email support	Throughout (Jul 2026–May 2027)

All meetings can be held in person or via zoom.

Fee

Item	**Cost**
Organisational review and transition support (as detailed above)	£6,000 + VAT

Payment due Jan 2027.

Exclusions

- Legal advice (we recommend instructing a solicitor for complex TUPE, land transfer, or contractual matters) – we will advise if/when this is needed during the process
- Recruitment or HR casework – this can be carried out by separate negotiation

Additional support beyond this scope can be provided at our standard consultancy rate.

Timeline Summary

Milestone	Target Date
Project commencement	July 2026
Data gathering complete	End August 2026
Options paper and recommendations	October 2026
Staffing decisions confirmed	End October 2026
Precept submitted	January 2027
Dissolution of Balsall and Berkswell PC's	31st March 2027
New council formed	1st April 2027
Transition preparation complete	April 2027
Election	May 2027
New council operational	Mid-May 2027

WALC will provide independent impartial advice throughout the project, helping both councils work collaboratively to achieve a successful transition whilst recognising the individual strengths and priorities of each local council.

Next Steps

If you wish to proceed, please confirm acceptance of this proposal and we will schedule an initial meeting with both clerks and chairs to commence the review.

We look forward to supporting you through this transition.