

ACCESS AND INCLUSION

Purpose

This policy sets out the Shire of Plantagenet's (the Shire's) commitment to ensuring an accessible and inclusive community for people with disability, their families and carers.

Definitions

An **accessible and inclusive community** is interpreted as one in which all Council functions, facilities and services (both in-house and contracted) are open, available and accessible to people with disability, providing them with the same opportunities, rights and responsibilities as other people in the community.

Policy

1. The Shire will plan to achieve the following strategies to ensure the community is accessible and inclusive for people with disability, their families and carers:
 - 1.1. People with disability have the same opportunities as other people to access the services of, and any events organised by, the Shire.
 - 1.2. People with disability have the same opportunities as other people to access the buildings and other facilities of the Shire.
 - 1.3. The Shire provides information in a format that will enable people with disability to access the information as readily as other people are able to access it.
 - 1.4. People with disability receive the same level and quality of service from the staff of the Shire of Plantagenet as other people.
 - 1.5. People with disability have the same opportunities as other people to make complaints to the Shire.
 - 1.6. People with disability have the same opportunities as other people to participate in any public consultation arranged by the Shire.
 - 1.7. People with disability have the same opportunities to obtain and maintain employment within the Shire.
2. The Shire is committed to consulting with people with disability, their families and carers and disability organisations in addressing barriers to access and inclusion.

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Owner	Chief Executive Officer	Division	Corporate & Community Services
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ADVERTISING SIGNAGE AT SOUNNESS PARK

Purpose

To provide clear parameters for the display of advertising at Sounness Park, McDonald Avenue, Mount Barker.

Scope

This policy applies to advertising at Sounness Park, McDonald Avenue, Mount Barker.

Policy Statements

1. Apart from entrance, naming and directional signage no permanent signage is allowed at Sounness Park, without a specific council resolution.
2. Temporary advertising signage can be erected on the fencing adjacent to the eastern oval, hockey playing surface and the cricket nets for the duration of sporting season. The signage is to be removed within one week of the final game of the sporting season.
3. Maximum height and width of the advertising signage is limited to the fence size, signs are not to protrude from the edges of the fencing.
4. Of the available advertising space adjacent to the playing surfaces; 20% is reserved for advertising secured by the Plantagenet Sporting Club.
5. No advertising signage will be permitted that could be considered offensive, discriminatory, promoting smoke/tobacco or alcoholic products or contrary to the values of the Shire of Plantagenet. The design, wording, content, location, installation and ongoing maintenance condition of all advertising signage is to be to the satisfaction of the Manager Community & Recreation Services.
6. No advertising signage shall be painted or erected on any of the playing surfaces without the prior approval of the Executive Manager Infrastructure & Assets.
7. The installation and dismantling of signage must not result in any damage or defacement of any underground services, Council property or fixtures. All signage must be designed, constructed, installed and maintained to minimise the likelihood of risk of injury to any person.
8. The Plantagenet Sporting Club Committee will endorse advertising requests from the founding clubs prior to approval by the Manager Community & Recreation Services.
9. Clubs erecting advertising signage pursuant to the Policy do so on the understanding that the Council reserves the right to request removal of the advertising signs for any reason.

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BALL SPORTS AND EQUINE ACTIVITIES - SOUNNESS AND FROST PARKS

Purpose

To demonstrate Council's intent and direction with regard to the usage of ovals/parks for ball sports and equine activities in the town of Mount Barker.

Scope

This policy applies to ball sport and equine activities at Sounness and Frost Parks, Mount Barker.

Policy

1. Council will regard the primary activity at Sounness Park as ball sports, including but not limited to, cricket, football, soccer and hockey.
2. Council will regard the primary activity at Frost Park as equine, including but not limited to, horse racing, campdrafting and riding for the disabled.

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CAPITAL WORKS

– NEW AND EXISTING COMMUNITY BUILDINGS

Purpose

To guide the Shire of Plantagenet (the Shire) Council and community where:

- capital works on a Shire building are proposed by a lessee; or
- a community group proposes a new building on Council controlled property.

Policy

1. Process for capital works application (including proposals for a new building on Council controlled property):

- 1.1. Before the community group that leases the community facility prepares a request for capital works to a hall or public building, they should contact the Manager of Community and Recreation Services to discuss the project and application process.

- 1.2. Any request for capital works will require the applicant to address the following details and these should be prepared in advance of meeting with Shire staff:

- a) Demonstration of need in the form of a Needs Assessment

This should detail why the existing facilities are inadequate and how they negatively impact on the participation rates or activities of the user groups. This will also be critical to attract external funding.

- b) Demonstration of community benefit

This should outline how the upgrades proposed broaden benefit to the local and wider community and/or increase participation for particular user groups or activities. This should link to the Shire's Strategic Community Plan and Corporate Business Plan objectives.

- c) Feasibility and sustainability

This section should outline:

- *how the upgrades will deliver a quality, sustainable facility which aligns with the Council's strategic objectives;*
- *The ability of the applicant to source funding from own source revenues and external funding (other than the Shire) up to 66%; and*
- *if the upgrades reduce greenhouse gas emissions.*

d) Design brief

This section will outline the key design features and include site plan and hand drawn plans to scale of the proposed upgrades. It will also include an estimate of the cost of the project based on current square metre rates for construction.

e) Facility management

This section will outline plans for facility operation and management, initial and ongoing implications on Council staff and resources and ownership of assets.

Where applicable, the Shire will assess a lessee's adherence to its building maintenance obligations in making a determination on its ability to fulfil ongoing asset management activities.

2. Preparation of financial assistance submission

2.1. If the applicant has been able to demonstrate need, benefit, feasibility and provide a basic design concept with the relevant staff member, the Officer will refer the applicant to the Shire's Capital Assistance Grant Policy and assist the organisation with its preparation.

2.2. Following the completion of the process outlined in the Capital Assistance Grants Policy, a report will be prepared and submitted for consideration by the Council.

3. Prioritising applications

3.1. While the Council has established a Reserve Fund for the purpose of contributing to grant funded projects, the Council may exclude projects on the basis that they cannot be accommodated in the current or future budgets. The Council reserves the right to refuse to make available funding for projects under the following circumstances:

- a) When the Council believes that the proposal for funding is not a sufficiently high priority.
- b) When the Council considers that its financial commitments for the upcoming financial year preclude it from making funding available.
- c) When the proposal will lead to an unacceptable ongoing financial commitment by the Council.
- d) When the ongoing management of the capital items is unclear or places an unacceptable burden on Council staff and resources.
- e) When the legal and / or financial status of the organisation or clubs is in doubt.

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COMMUNITY GRANT PROGRAM GUIDELINES POLICY

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1. INTRODUCTION

Thank you for enquiring about financial assistance from the Shire of Plantagenet. The Shire's Mission Statement is:

“To enhance the quality of life for the people of Plantagenet and the region, through the provision of leadership, services and infrastructure.”

One key method to assist in achieving this mission is through our commitment to recognising the value of all volunteers and assisting community groups, via this Community Grant Program (CGP).

Each year the Shire of Plantagenet allocates funds within the Annual Budget specifically for providing financial support to the community organisations that meet the objectives of the Community Grants Program.

Four (4) CGP categories are on offer:

- 1. CEO Donation (up to \$1,000)**
- 2. Quick Response Grant (less than \$3,000)**
- 3. Community Grant (more than \$3,000)**
- 4. Industry Support (Triennium Community Grants)**

The table on pages 4 & 5 of these guidelines demonstrates how to apply, when applications are open and eligible items for each of these four grant categories. The complexity of the application and the information required, along with the subsequent approval process, increases with each of the four categories listed above.

One key consideration of the CGP process is that it be as simple as possible, whilst balancing the responsible use of public money, to enable our community volunteers to get on with what they are most passionate about. We encourage you to make contact with the Community Development Officer at the Shire (contact details on the last page of these guidelines) and discuss your idea at the earliest possible time.

2. OBJECTIVES

The CGP aims to support projects that improve community capacity, promote social participation and inclusion as well as enhance community harmony.

The Shire of Plantagenet 's CGP provides funding to assist community groups and not-for-profit organisations with their vital work and programs to:

- Enhance community capacity, foster harmony, and promote social cohesion within the community.
- Motivate individuals and organizations to take initiative in supporting their own growth and development.
- Ensure equitable distribution of activities and services across the Shire; and
- Promote resident involvement in activities that enhance living in the community.

3. TYPES OF GRANTS AVAILABLE

GRANT CATEGORY		HOW TO APPLY	OPEN DATE	ELIGIBLE APPLICANTS	NON-ELIGIBLE ITEMS	ASSESSMENT PROCESS
1.	CEO Donation Up to \$1,000	Detailed requests to be sent in a letter to the CEO with supporting documents	Open anytime	<ul style="list-style-type: none"> Local community organisations (unincorporated) Incorporated community and sporting organisations for local benefit Non-profit organisations from within Plantagenet 	<ul style="list-style-type: none"> Alcohol Items directly benefiting an individual Assistance towards operating costs of the applicant (eg rent, wages, utility costs etc) Projects not based in Plantagenet Political activities 	CEO consideration
2.	Quick Response Grant \$1,000 to \$3,000	Detailed requests to be sent in a letter to the CEO with supporting documents	Open anytime	<ul style="list-style-type: none"> Incorporated, not for profit organisations and charities Unincorporated not-for-profit organisations applying through the auspice of an incorporated body 	<ul style="list-style-type: none"> Alcohol Items directly benefiting an individual Assistance towards operating costs of the applicant (eg rent, wages, utility costs etc) Projects not based in Plantagenet Political activities 	Community Grants Program Working Group recommendation to CEO

GRANT CATEGORY		HOW TO APPLY	OPEN DATE	ELIGIBLE APPLICANTS	NON-ELIGIBLE ITEMS	ASSESSMENT PROCESS
3.	Community Grants \$3,000 +	Formal application with supporting documents	Round 1: August – September Round 2: February - March	<ul style="list-style-type: none"> Incorporated, not for profit organisations and charities Unincorporated not-for-profit organisations applying through the auspice of an incorporated body 	<ul style="list-style-type: none"> Alcohol Items directly benefiting an individual Assistance towards operating costs of the applicant (eg rent, wages, utility costs etc) Political activities 	Community Grants Program Working Group recommendation to Council
4.	Industry Support 3yr (Triennium) Grants	Formal application with supporting documents Presentation to the Council	February - March	<ul style="list-style-type: none"> Incorporated, not for profit organisations and charities Unincorporated not-for-profit organisations applying through the auspice of an incorporated body 	<ul style="list-style-type: none"> Alcohol Items directly benefiting an individual Political activities 	CEO / Executive recommendation to Council

4. HOW DO I FIND OUT ABOUT THE CGP?

Category 1 & 2 grants are always open and you can submit your application now.

Before and during each category 3 & 4 funding round, advertising of the CGP will be placed in:

- Local newsletter 'The Plantagenet News.'
- As a Latest News item on the Shire of Plantagenet website.
- the Shire of Plantagenet Facebook page; and
- Shire information notice boards.

More information is available on the Shire's website [here](#).

5. WHO CAN APPLY?

Please refer to the 'eligible applicants' column in the table on pages 3 & 4 of these guidelines.

6. WHO CANNOT APPLY?

Each organisation may submit only one application for funding per financial year.

Previous recipients of the CGP must have completed and submitted the required acquittal documents for any funds previously received to be eligible to apply for further rounds. Failure to meet all acquittal requirements automatically disqualifies you from applying in further funding rounds.

The following applicants are also ineligible:

- Unincorporated organisations without an auspice arrangement (Categories 2 – 4).
- Individuals.
- Commercial for-profit organisations.
- Government Agencies (including education, health, transport); or
- Organisations that have a current application open within the CGP.

7. ELIGIBLE PROJECT COSTS MAY INCLUDE

- Costs associated with public events or functions held in the Shire of Plantagenet.
- Purchase of equipment required for the ongoing operations of the club/group, e.g. shade tent, tables, chairs etc.
- Construction/purchase costs for facility upgrades;
- Printing of marketing materials (posters/flyers).
- Advertising and promotions.
- Assistance towards workshops/projects that benefit the Plantagenet community.
- Entertainment at an event.

8. ITEMS THAT WILL NOT BE FUNDED

In addition to those items listed in the table on pages 4 & 5 for each CGP category:

- Projects that do not benefit the Plantagenet community.
- Assistance towards Council rates or standard user agreements.
- Conference attendances.
- Projects that have already commenced or been finalised.
- Political activities.
- Projects that are a duplicate of an existing or similar project/service within the community.
- An item directly benefiting an individual; or
- Any item that may cause offence to others or cause the Shire's name to be in disrepute.

9. SELECTION CRITERIA

Collaborative community wide projects are encouraged.

Applications will be assessed against the following:

- Does the project meet a broader community need?
- Does the project benefit a sufficiently broad, or diverse, target group?
- Does the applicant organisation have the capacity to undertake and manage the project successfully?
- Does the application represent value for money?

The level of assistance available is limited by the Council's budget allocation and its priorities. No applicant can be guaranteed funding, nor can any applicant be guaranteed to receive the full amount requested.

10. PUBLIC LIABILITY INSURANCE & AUSPICING

Not-for-profit organisations must have Public Liability Insurance and provide a Certificate of Currency in order to be eligible for the CGP.

If your application is under auspice by another organization, you are required to provide the Public Liability Certificate of Currency of your auspice organisation.

11. ABN & GST

To comply with the requirements of the Federal Government's Goods and Services Tax (GST) you must advise on your application if your organisation is registered for GST. If you do not have an ABN or are not registered for GST, you are required to complete a Statement by a Supplier form and include it with your application.

The Shire of Plantagenet cannot release funds to successful applicants without an ABN or signed Statement by a Supplier form.

Statement by a Supplier forms are available on the ATO website [here](#).

12. SHIRE VALUES AND COMMITMENT

All applicants must demonstrate that the organisation or community group has a vision that is consistent with the Shire of Plantagenet's. Organisations or community groups who apply to the CGP that engage in negative public comments that disparage the Shire, Councillors and/or staff may have their application denied on this basis.

The Shire's values and long-term vision can be found [here](#).

13. HOW TO APPLY

Please refer to the table on pages 4 & 5 for details on each CGP category:

Category 1 & 2 - Detailed requests to be sent in a letter to the CEO with sufficient supporting documents (e.g. quotes, photos, plans, etc). Applications are always open.

Category 3 - Formal application using the application form with supporting documents. Round 1 is open August – September each year, Round 2 is open February – March. The application must address the selection criteria provided within the application guidelines and include all required attachments such as budgets, receipts, quotes and letters of support.

Category 4 - Formal application using the application form with supporting documents, along with a presentation to the Council. Industry support is set for a three (3) year period and applications are open February – March each year.

Organisations that have not provided an acquittal from previous CGP applications are ineligible to apply until the required documentation has been completed and submitted.

Tips for your application:

- Projects that can demonstrate benefits to the wider community are preferred.
- Projects that can demonstrate contributions from the community or community groups will be preferred.
- Applications that have multiple funding sources/financial contributors will be preferred.
- Applications for major and minor grants received from individuals will not be accepted.
- Projects requesting funding for salary costs, administration support and recurring expenditure are ineligible for support (Category 1 – 3 only).

Late applications will not be considered.

All applicants will be advised of the outcome of their application in writing.

14. APPLICATION PROCESS

Step 1

Contact the Community Development Officer at the Shire of Plantagenet to discuss your project idea and confirm that it falls within these guidelines & familiarise yourself with the guidelines.

Step 2

Write a letter of request containing sufficient information (category 1 & 2) or download and complete the application form (category 3 & 4).

Step 3

Collate all supporting documents and attachments listed on the Application Checklist or in these guidelines and submit the application before the closing date. Late applications will not be accepted (category 3 & 4).

Applicants will receive a confirmation email from the Community Development Officer within 5 working days of receiving applications. If no confirmation is received after this time, please call the Shire on 9892 1111 as soon as possible.

Step 4

Recommendations from applications received (Category 3 & 4) are considered at the October or April Ordinary Council Meeting. Council Meeting commences at 5pm and is held in the Council Chambers at the Shire of Plantagenet Administration Centre.

Step 5

Applicants are notified of outcome via written correspondence.

Step 6

Grant Agreement between the Shire of Plantagenet and successful applicant to be signed.

Step 7

Project is completed.

Step 8

Successful applicant completes evaluation and acquittal report within 30 days of completion/delivery of project. Submit report and receipts to the Shire of Plantagenet Community Development Officer. (Please ensure all supporting documentation and receipts are included – refer to the acquittal form for details).

Step 9

Invoice to be raised and sent to Shire of Plantagenet. Upon receipt and processing of invoice, payment of acquitted funds will be made to the recipient organization.

15. ASSESSMENT COMMITTEE

The Community Grants Program Working Group that assesses category 2 and 3 applications shall consist of:

- Executive Manager – Corporate & Community Services
- Manager Community & Recreation Services; and
- Community Development Officer

16. CONFLICT OF INTEREST

Councillors and Shire employees involved in assessing applications for funding must declare any financial interest, proximity interest or impartiality interest before the relevant application is considered and follow the necessary procedure regarding such declaration.

17. SHIRE ACKNOWLEDGEMENT

Approved recipients are required to publicly acknowledge the Shire of Plantagenet's contribution to their project or equipment. This will entail incorporating the Shire of Plantagenet logo into all promotional and marketing materials. Recipients must provide supporting evidence of this.

All items purchased with grant funds must clearly display a "Proudly sponsored by the Shire of Plantagenet" inscription or an acknowledgment sticker, which will be supplied by the Shire. Notifications of successful applications will be shared on the Shire of Plantagenet's Facebook page, as also should be shared on recipient's social media platforms.

Recipients must liaise with the Shire's Community Development Officer to acquire the Shire's logo for project promotion purposes. Additionally, it is mandatory for recipients to submit any promotional materials featuring the logo to the Community Development Officer for approval **BEFORE** any public release. This procedure guarantees the proper use of the Shire's logo and ensures the Shire is accurately represented in all communications. The Shire may request highlights of the project's success and positive impact for promotional purposes. We require your cooperation to showcase these achievements, aiming to inspire and motivate other community groups to participate in the Community Grants Program (CGP).

Shire President and Councillors should be extended an invitation to any events, launches, or initial uses of the funded equipment or project outcomes.

18. ACQUITTAL PROCESS & OUTCOMES

Completion of the acquittal process is a crucial part of the CGP process. Grant recipients are required to submit both receipts and a completed acquittal report form to the Shire of Plantagenet within 30 days following the completion of their project. The necessary

acquittal form will be provided to applicants upon the approval of their funding applications.

The disbursement of CGP funds to successful community organisations will occur following the receipt of the completed acquittal report form along with the necessary supporting evidence.

Advance payments may be requested in writing and are subject to the CEO's approval. Requests for deadline extensions must also be submitted in writing and can only be approved by the Shire's CEO.

Failure to complete and submit all acquittal requirements within 6 months following the application's approval, will result in the allocated funds being forfeited, regardless of whether they have been expended or committed by the organisation. Incomplete acquittals will also disqualify the organisation from all future CGP funding rounds until acquittals have been satisfactorily completed.

Additionally, the activities and outcomes of the Community Grants Program will be detailed in the Shire's Annual Report.

19. APPLICATION ASSISTANCE AND SUBMISSION

For further information or assistance with your application contact:

Isabelle Draffehn
 Community Development Officer
 9892 1105 or info@sop.wa.gov.au

Completed applications are to be submitted via one of the below options and addressed to:

SHIRE OF PLANTAGENET COMMUNITY GRANTS PROGRAM
 ATTN: Community Development Officer

- Email: info@sop.wa.gov.au
- Post: PO Box 48 MOUNT BARKER WA 6324
- In person: 22-24 Lowood Road, MOUNT BARKER

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COMMUNITY HALLS AND BUILDINGS

Purpose

To clarify the Shire of Plantagenet (the Shire) Council's position with regard to the ongoing operation and development of community halls and public buildings.

Policy

1. The Council is of the opinion that community halls within the district should be operated and developed in accordance with the following:
 - 1.1. Wherever possible, operated by an appropriate incorporated community body.
 - 1.2. 'Operated' in part (1.1) can include ownership or leasing.
 - 1.3. If sale or lease for community hall purposes is not possible, the closure of the hall and subsequent sale and removal of the subject structure will be pursued.

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CORPORATE CREDIT CARD POLICY

Preamble

This policy provides a framework to guide the Shire of Plantagenet (the Shire) Chief Executive Officer (CEO) when fulfilling their statutory duties for establishing and implementing appropriate systems and procedures for incurring expenditure and making payments specific to Corporate Credit Cards.

The policy contributes to the Shire meeting its obligations under the Local Government Act 1995 and the Local Government (Financial Management) Regulations 1996. It also reflects the Shire's commitment to organisational excellence and upholding the principles of transparency, probity and good governance, and interacts with and complements the Shire's broader procurement operating environment.

Purpose

To provide the Shire CEO with a framework of principles to guide the use and management of Corporate Credit Cards.

The policy aims to:

- ensure efficient and effective procurement and payment operations;
- minimise the risk of misuse, fraudulent or corrupt use;
- define allowable and prohibited uses;
- define management and oversight obligations; and
- define Cardholder duty of care and responsible use obligations.

Scope

This policy applies to Shire employees who have been authorised by the CEO to incur expenditure by means of a Corporate Credit Card.

Definitions

Cardholder means an employee who has been authorised by the CEO to incur expenditure by means of a Corporate Credit Card.

Corporate Credit Card means a card approved for use in lieu of cash transactions, to incur expenditure for goods and services for the purposes of the Shire of Plantagenet business activities only in accordance with relevant Shire of Plantagenet Policies.

Policy

1. Management Oversight and Reporting

1.1. Legislation

- a) Section 6.5(a) of the *Local Government Act 1995* prescribes the CEOs duty to ensure that proper accounts and records of the transactions and affairs of the Local Government are kept in accordance with regulations.
- b) The Local Government (Financial Management) Regulations 1996 prescribe:
 - i. Regulation 5, the CEOs duties to ensure efficient systems and procedures are established for the proper authorisation of incurring of liabilities and the making of payments.
 - ii. Regulation 11(1)(a) and (2) requires Local Government to develop procedures that ensure effective security for the authorisation and payment of accounts and for the authorised use of payment methods, including credit cards.

1.2. Determining when Corporate Credit Cards are appropriate

- a) A Corporate Credit Card may be implemented and maintained where the card provides benefit to the Shire's operations by ensuring:
 - i. goods and services can be obtained in a timely and efficient manner to meet the business needs of the Shire;
 - ii. financial management and accounting standards are met; and
 - iii. purchasing and payment functions are secure, efficient and effective.
- b) Corporate Credit Card providers will only be acceptable where, in the opinion of the CEO, they:
 - i. provide appropriate and sufficient statement, administration and acquittal controls that enable the Shire to sufficiently administer the facility; and
 - ii. provide the Shire with protection and indemnification from fraudulent unauthorised transactions.

1.3. Management Oversight

- a) The CEO shall determine and implement systems and procedures adequate to ensure:
 - i. assessment and selection of Corporate Credit Cards suitable to the efficient and effective operations of the Shire of Plantagenet;
 - ii. authorisation and appointment of suitably eligible Cardholders;
 - iii. Cardholder duties and responsibilities are documented, and Cardholders provided with training; and
 - iv. monitoring and auditing of Corporate Credit Card activities is planned and reported.

1.4. Reporting

- a) The CEO will ensure that acquitted transaction statements for each Corporate Credit Card are provided to Council as part of the monthly financial reporting regime.

1.5. Misuse, Misconduct and Fraudulent Use

- a) Any alleged misuse of Corporate Credit Cards will be investigated and may be subject to disciplinary procedures.
- b) Where there is reasonable suspicion of misconduct or fraudulent activity arising from Corporate Credit Cards the matter will be reported to the appropriate regulatory agency, subject to the requirements of the *Public Sector Management Act 1994* and the *Corruption, Crime and Misconduct Act 2003*.

2. Principles for Corporate Credit Card usage

2.1. Allowable Transactions

- a) Corporate Credit Cards may only be used under the following circumstances:
 - i. The expenditure is directly arising from a Shire operational business activity for which there is an Annual Budget provision.
 - ii. The expenditure is in accordance with legislation, the Shire's Purchasing Policy, Code of Conduct and any conditions or limitations applicable to the individual Cardholder.
 - iii. The procurement of the required goods or services is impractical or inefficient if undertaken via a purchase order or is not able to be obtained other than by a Corporate Credit Card.
 - iv. Supplier surcharges (fees) on transactions are minimised and only allowable where the alternative method of obtaining the supply (i.e. by purchase order) is more onerous, not cost effective or there is no alternative mode of supply.
 - v. Hospitality expenditure may only occur when it is in accordance with the Shire's Hospitality Policy or is undertaken with the express written permission of the CEO.
 - vi. Official travel, accommodation and related expenses may only occur in accordance with the Shire's policies and procedures.
 - vii. Accounts payable payments are made under the direction of the Finance Manager.
 - viii. A sufficient record of each transaction is obtained and retained in the local government record.
- b) Allowable transaction modes include:
 - i. in-person and over the counter retail purchases;
 - ii. telephone or facsimile purchasing;
 - iii. mail order purchasing and subscriptions; and
 - iv. internet purchasing.

2.2. Prohibited Transactions

- a) The Shire prohibits the use of Corporate Credit Cards in the following situations:
 - i. Cash advances.
 - ii. Incurring expenses which are personal or private (i.e. any expenditure which is not an approved Local Government activity).
 - iii. Making deposits onto the card, whether to offset misuse or otherwise.
 - iv. Incurring Capital expenditure.
 - v. Incurring expenditure for goods or services which are subject to a current supplier contract.
 - vi. Incurring expenses which are not in accordance with legislation, Shire policy, the Annual Budget and/or the conditions or limitations relevant to the individual Cardholder.
 - vii. Expenses for which another Corporate Credit Card is the approved facility (i.e. the Corporate Credit Card is not to be used for purchasing fuel or oil, as the fuel card is the approved facility for that purpose).
 - viii. Splitting expenditure to avoid compliance with the Purchasing Policy or to negate limits or conditions applicable to the Cardholder.
 - ix. Incurring expenses for the primary purpose of obtaining personal advantage through the transaction (i.e. membership or loyalty rewards).
- b) For clarity, Elected Members are prohibited from using Shire Corporate Credit Cards as the *Local Government Act 1995* does not provide authority for an Elected Member to incur liabilities on behalf of the Local Government. The Act limits Local Governments to only paying Elected Member allowances and reimbursing Elected Member expenses.

2.3. Cardholder Duty of Care and Responsible Use Obligations

- a) A Cardholder is required to do the following:
 - i. Keep the Corporate Credit Card and access information in a safe manner; protected from improper use or loss.
 - ii. Only use the Corporate Credit Card for allowable purposes and not for prohibited purposes.
 - iii. Obtain, create and retain Local Government records that evidence transactions.
 - iv. Acquit the reconciliation of Corporate Credit Card usage in the required format and within required timeframes. The onus is on the cardholder to provide sufficient detail for each transaction to avoid any potential perception that a transaction may be of a personal nature.
 - v. Return the Corporate Credit Card to the Shire of Plantagenet before termination of employment, inclusive of reconciliation records.
 - vi. Reimburse the Shire the full value of any unauthorised, prohibited or insufficiently reconciled expenditure.
- b) Benefits obtained through use of a Corporate Credit Card (i.e. membership or loyalty rewards) are the property of the Shire and may only be used for Shire business purposes. Such benefits must be relinquished by the Cardholder to the Shire. Under no circumstances may such benefits be retained as a personal benefit.

2.4. Transaction Evidence

- a) A sufficient transaction record must include the following minimum information:
 - i. Invoice and / or receipt that includes; the date, company name, address, ABN, amount and any GST amount included.
 - ii. Where an invoice and / or receipt cannot be obtained, the Cardholder must provide a Statutory Declaration, in accordance with the *Oaths, Affidavits and Statutory Declarations Act 2005*, detailing the nature of the expense and sufficient information to satisfy the requirements of subclause (a) above.
- b) Where a Corporate Credit Card is used to incur an expense for hospitality, the transaction record must include for the purposes of Fringe Benefits Tax calculations and probity:
 - i. the number of persons entertained;
 - ii. the names of any employees in that number; and
 - iii. the purpose of providing the entertainment or hospitality.

Document Control			
Document Responsibilities			
Owner	Chief Executive Officer	Business Unit	Corporate & Community Services
Reviewer	Executive Manager	Approval	Council
Document Compliance			
Legislation	<ul style="list-style-type: none">Local Government Act 1995Local Government (Financial Management) Regulations 1996Public Sector Management Act 1994Corruption, Crime and Misconduct Act 2003Oaths, Affidavits and Statutory Declarations Act 2005		
Other	Shire of Plantagenet Code of Conduct		
Document Management			
Version #	Effective Date	Sections Modified (if applicable)	
1	27 February 2024	Adopted	
2	XX XXX 2025	Policy reviewed and reformatted	

DEBT COLLECTION

Purpose

This policy outlines clear and appropriate debt recovery procedures which will be undertaken by the Shire of Plantagenet (the Shire). It ensures effective control over all invoiced debts owed to the Shire Council whilst being sympathetic to those ratepayers and debtors suffering genuine financial hardship.

Policy

1. Rates – Outstanding Amounts

- 1.1. Fourteen days after the due date, a reminder letter will be issued, giving seven days to arrange payment.
- 1.2. Amounts outstanding after the seven days will be followed up with a Final Notice, giving seven days to arrange payment.
- 1.3. Following this seven-day period, contact is to be made by telephone where possible, in order to seek payment or a special arrangement.
- 1.4. If payment is not received or adequate payment arrangements not entered into, further in-house debt collection options may be followed or referred to debt recovery / legal agencies. Liaison will occur with such agencies to use a range of debt recovery options which, with the approval of the CEO, can be escalated to serving a General Procedure Claim. Following that, a Judgment and/or Means Inquiry can be pursued. These options will be based on individual circumstances, including those of genuine hardship.
- 1.5. Other courses of action that may be taken include:
 - a) Rental seizure under Section 6.60 of the *Local Government Act 1995*.
 - b) Lodging a Caveat on the property.
 - c) Sale of land under S6.64 of the *Local Government Act 1995* in accordance with Delegation 2.10. In this instance the Shire may rent or dispose of the property if rates remain unpaid for at least three years.
- 1.6. Ratepayers who are unable to pay rates and charges by the due date either because of reasons beyond their control or because payment would cause undue hardship, may apply to enter into an agreement to make periodic payments subject to the following:
 - a) Special arrangements will be for regular instalments with the debt to be finalised by 30 June of the financial year where possible.
 - b) For special arrangements made after 1 April in any year, where it is not possible for the debt to be finalised by 30 June of that year, the instalment payments will be sufficient to pay the current debt and an estimate of the following year's rates, to be finalised by 30 June of the next financial year.
 - c) The CEO is to endorse any special arrangement where it is not possible for the debt to be finalised according to Clause 1.6(a) or 1.6(b).

- 1.7. Eligible ratepayers experiencing extreme financial hardship may apply to enter into an agreement under the Shire's Rates Debt Collection – Hardship Policy.

2. Sundry Debtors

- 2.1. Sundry debtor accounts become overdue if not paid within 30 days of issuing of the account.
- 2.2. On becoming overdue, a statement is to be issued requesting immediate payment.
- 2.3. Fourteen days after the statement is issued, contact is to be made by telephone where possible, in order to seek payment and to advise that the provision of credit facilities will cease in seven days.
- 2.4. After this seven day period has lapsed, the Shire may stop the provision of credit facilities to debtors. Recovery action may also be taken in line with Clause 1.4 unless the debtor enters into and complies with an overdue payment agreement. Any such agreement will not exceed six months unless exceptional circumstances exist.
- 2.5. The CEO may determine other suitable treatment options to deal with sundry debtors in the case of demonstrated hardship or other situations.

Document Control			
Document Responsibilities			
Owner	Chief Executive Officer	Business Unit	Corporate & Community Services
Reviewer	Executive Manager	Approval	Council
Document Compliance			
Legislation	Local Government Act 1995		
Other	Rates Debt Collection – Hardship Policy		
Document Management			
Version #	Effective Date	Sections Modified (if applicable)	
1	24 June 2014	Adopted	
2	29 April 2025	Policy reviewed and reformatted	

FINANCIAL MANAGEMENT – BORROWING PROGRAM AND ASSET FINANCING

Purpose

To recognise the degree to which borrowing is acceptable, determine in what circumstances borrowing should and should not be utilised, consider funding strategies for major assets and categories of services and satisfy the Western Australian Treasury Corporation that any new borrowings will not place financial stress on the Council.

Policy

1. Long-term borrowing will not be used to finance current operations or normal maintenance.
2. The Shire will strive to achieve a high reliance on pay-as-you-go financing for its capital improvements.
3. All debt issued, including by lease purchase methods, will be repaid within a period not to exceed the expected useful lives of the improvements financed by the debt.
4. The Council may consider borrowing proposals on their merits from time to time and give favourable consideration to borrowing money for the acquisition or construction of an asset under the following circumstances:
 - where the asset to be acquired is a new addition to the Council's asset base and the project contributes to the achievement of an identified strategic objective; or
 - where the asset replaces an existing asset and has a useful life of greater than 10 years; or
 - where the asset is required urgently and unexpectedly, or a significant community need for the asset has been identified; and
 - one of the following funding conditions exists:
 - the project will reduce operating costs to an extent sufficient to cover the cost of the project and generate further savings to the Shire.
 - the borrowing cost could be supported by additional revenue over the effective life of the project.
 - all alternative options for undertaking the project without borrowing have been investigated and proven less advantageous to the Council.
 - the income stream from the asset to be acquired or constructed exceeds the cost of borrowing over the life of that asset.
 - repayments will be met by a third party such as self-supporting loans and the financial stability of that party meets the criteria as set out in the Self-Supporting Loans Policy.
 - to save for the acquisition or construction will result in the actual cost being greater than the cost of borrowing the money and acquiring it today, or
 - to delay a project would jeopardise it due to grant funding restrictions or opportunities.

5. Where surplus funds are available, the decision to repay or reduce borrowings should be made based on the facts available at the time giving due regard to minimising the overall cost to the Council.
6. As a part of deliberations on loan financing, the Council will consider its capacity to pay based on the trends shown in quantitative data required by the Western Australian Treasury Corporation.

Document Control			
Document Responsibilities			
Owner	Chief Executive Officer	Business Unit	Corporate & Community Services
Reviewer	Executive Manager	Approval	Council
Document Compliance			
Legislation			
Other	Self-Supporting Loans Policy		
Document Management			
Version #	Effective Date	Sections Modified (if applicable)	
1	23 January 2007	Adopted	
2	29 April 2025	Policy reviewed and reformatted	

INTERNAL CONTROL

Purpose

To ensure that appropriate internal controls are implemented in order to:

- fulfil the statutory obligations under the Local Government (Financial Management Regulations 1996 and Local Government (Audit) Regulations 1996; and
- ensure that the Shire of Plantagenet's (the Shire's) assets are safe from loss due to fraud and mismanagement.

Policy

1. The Council will, through the Chief Executive Officer (CEO), ensure that appropriate and efficient internal controls are in place covering:
 - a) staffing and segregation of duties;
 - b) information technology;
 - c) documented procedures and processes covering the recording, reporting and authorisation of transactions; and
 - d) monitoring performance and adherence.

Document Control			
Document Responsibilities			
Owner	Chief Executive Officer	Business Unit	Corporate & Community Services
Reviewer	Executive Manager	Approval	Council
Document Compliance			
Legislation	<ul style="list-style-type: none">Local Government (Financial Management) Regulations 1996Local Government (Audit) Regulations 1996		
Other			
Document Management			
Version #	Effective Date	Sections Modified (if applicable)	
1	27 May 2014	Adopted	
2	29 April 2025	Policy reviewed and reformatted	

INVESTMENTS

Purpose

To document and provide the necessary information for Shire of Plantagenet (the Shire) delegated officers to invest surplus funds.

Policy

1. Principles

- 1.1. This policy seeks to ensure the following:
 - a) The Council conforms with its fiduciary responsibilities under Section 6.14 of the *Local Government Act 1995* and Section 18 (1)(a) of the *Trustees Act 1962* (the 'Prudent Person' rule).
 - b) At all times, the Council has in place a current set of policies and delegations for its Investments Officers.
 - c) Adherence to the guidelines by all officers with delegated authority to invest/control surplus funds.
- 1.2. This policy is to be made available to all employees involved in daily investment decisions.
- 1.3. Notwithstanding the provisions of this Policy, the general financial management obligations imposed under the *Local Government Act 1995* and the *Local Government (Financial Management) Regulations 1996* should at all times be complied with.

2. Prudent Person Rule

- 2.1. The investment options available to local government authorities in Western Australia were altered in June 1997 with changes to the Trustees Act. With the passage of changes to the Trustees Act, the list of prescribed investments has been removed and replaced by the Prudent Person rule.
- 2.2. The main features of the prudent person rule include:
 - a) Exercising the care, diligence and skill that a prudent person would exercise in managing the affairs of other persons; and
 - b) A duty to invest funds in investments that are not speculative or hazardous.
- 2.3. In exercising powers of investment, there are important matters for consideration:
 - a) The purpose of the investment and the needs and circumstances;
 - b) The desirability of diversifying investments and the nature of and risk associated with existing investments;
 - c) The need to maintain the real value of capital and income; the risk of capital or income loss or depreciation. The potential for capital appreciation;
 - d) The likely income return and timing of the income return. The length of the term of the proposed investment;

- e) The liquidity and marketability of the proposed investment. The aggregate value of the investment;
- f) The effect of the proposed investment in relation to the tax liability (if any);
- g) The likelihood of inflation affecting the value of the proposed investment; and
- h) The costs of making the proposed investment; the results of a review of existing investments.

3. Investment Objectives

- 3.1. To add value through prudent investment of funds.
- 3.2. To support the local community bank without putting the Shire's surplus funds to any undue risk.
- 3.3. To have ready access to funds for day-to-day requirements, without penalty.
- 3.4. To utilise the benefits of the Western Australian Treasury Corporation (WATC) Investment Facility.

4. Authority to Invest

- 4.1. Surplus funds are to be invested in term deposits or negotiable certificates of deposit with Western Australian Treasury Corporation, Bendigo and Adelaide Bank and other banks with branches in Mount Barker or Albany, subject to their Standard and Poor's long-term credit rating being at least BBB+ and the short-term rating being at least A-2. Any proposal to invest funds in any other institution not referred to above is to be referred to the Council.
- 4.2. Investments from the municipal, loan and reserve accounts are to be kept separate and distinct from the trust account.
- 4.3. Funds may be invested for terms up to 3 years based on predicted cash flow requirements and in accordance with the *Local Government Act (Financial Management) Regulations 1996*.
- 4.4. The Chief Executive Officer may invest any funds held in the Municipal Fund or the Trust Fund that is not, for the time being, required for any other purpose, in accordance with Council Delegation 2.7 Investment of Surplus Funds.
- 4.5. The Deputy Chief Executive Officer or Senior Finance Officer may invest any funds held in the Municipal Fund or the Trust Fund that is not, for the time being, required for any other purpose, in accordance with 2.7(A) Investment of Surplus Funds Sub-delegation.

5. Review and Reporting

- 5.1. The investment portfolio is to be reported to Council each month, listing for each investment the institution, amount, maturity date, and interest rate.

- 5.2. Bendigo and Adelaide Bank's short-term credit rating as defined by Standard and Poor's is to be monitored monthly by the Deputy Chief Executive Officer. Any downgrading of the long-term BBB+ or short-term A-2 rating is to be reported to the Council.

Document Control			
Document Responsibilities			
Owner	Chief Executive Officer	Business Unit	Corporate & Community Services
Reviewer	Executive Manager	Approval	Council
Document Compliance			
Legislation	<ul style="list-style-type: none">Local Government Act 1995Local Government Act (Financial Management) Regulations 1996Trustees Act 1962		
Other	Council Delegations		
Document Management			
Version #	Effective Date	Sections Modified (if applicable)	
1	November 1998	Adopted	
2	29 April 2025	Policy reviewed and reformatted	

METHODS OF VALUATION OF RATEABLE PROPERTIES

Purpose

To enable the Shire of Plantagenet (the Shire) Council to form an opinion on the predominant use of rateable properties in order to make a recommendation to the Minister for Local Government in relation to the method of valuation of those rateable properties.

Policy

1. Section 6.28 of the *Local Government Act 1995* provides that in determining the method of valuation of rateable property, the Minister is to have regard to the general principle that the basis for a rate on any land is to be:
 - a) Where the land is used predominantly for rural purposes, the UV of the land.
 - b) Where the land is used predominantly for non-rural purposes, the GRV of the land.
2. The process for reviewing the method of valuation for any rateable property will be in accordance with guidelines issued by the Department of Local Government, Sport and Cultural Industries. This involves sending a Land Use Declaration Form to each property owner followed by formal consideration by the Council.
3. The following factors will be considered in determining its opinion of the predominant use of land:
 - a) planning scheme zoning;
 - b) activities conducted on the land;
 - c) development on the property; and
 - d) livelihood generated from or on the property.
4. Planning scheme zoning will be a major influence in determining the valuation method. Properties zoned Rural will generally be valued using the UV method, regardless of the property size.
5. Split valuations of rateable properties will not be pursued.
6. The Council will consider applications from landowners to review previous decisions to adopt or change the method of valuation of rateable property. The process will be in line with Parts 1 to 4 of this policy.

Document Control			
Document Responsibilities			
Owner	Chief Executive Officer	Business Unit	Corporate & Community Services
Reviewer	Executive Manager	Approval	Council
Document Compliance			
Legislation	Local Government Act 1995		
Industry	<ul style="list-style-type: none">Department of Local Government, Sport and Cultural Industries GuidelinesLand Use Declaration Form		
Other	Planning Scheme Zoning		
Document Management			
Version #	Effective Date	Sections Modified (if applicable)	
1	10 October 2017	Adopted	
2	29 April 2025	Policy reviewed and reformatted	

NATURAL BURIAL

Purpose

To provide natural burial opportunities that conserve and enhance local biological diversity, water resources and soil quality, and by doing so, maintain the ecological functions and integrity of the larger regional ecosystem.

Policy

1. To reduce the impact of conventional burial and cremations on the environment:
 - a) No embalming of the body will be permitted, and the deceased must be conveyed in an approved casket or coffin, constructed of a biodegradable and untreated material derived from a sustainable resource.
 - b) It is not intended that any artificial joints, limbs or other implants be removed prior to burial, although funeral directors shall remove any heart pacemakers, infusion pumps and any other battery-operated devices.
 - c) Burial sites will be planted with indigenous flora.
2. To maintain or enhance the quality of the natural environment:
 - a) Plots may be laid out in a similar way as a conventional cemetery but regeneration will be used in place of traditional memorial practices.
 - b) Additional flora may be grown around the plot to create a green or natural setting that will provide a haven for fauna in the future.
 - c) Natural burials shall only involve a single burial except where two burials are to occur simultaneously during the conduct of the same funeral, in which case a second burial will be permitted. This ensures that the newly created environment remains undisturbed.
 - d) Plot locations will be surveyed and mapped. A defined survey mark will be placed nearby to indicate grave locations.
3. To achieve rapid and real return of the body to the earth:
 - a) Natural burial is defined as burial that conforms to the ordinary course of nature.
 - b) The aim is to return the body to the soil as quickly as would naturally occur.
 - c) The absence of embalming may assist this.
 - d) The body is buried to a depth with an active layer of soil (1.4m) to maximise the rate of decomposition and the use of biodegradable coffins or caskets will further enhance this process.
4. To provide a more natural and sustainable alternative to conventional burial:
 - a) Natural burial aims to lower the environmental impact and carbon footprint of burial.
 - b) In the absence of embalming and through the use of coffins and caskets which are simpler and less ornate certain environmental components attributed to the conduct of conventional funerals may be reduced.

5. To ensure low ongoing sustainable maintenance requirements:
 - a) Less maintenance will be carried out in a natural burial cemetery due to the reduced need for landscaping, plot manicuring, and headstone upkeep and memorabilia management.
 - b) Natural cemeteries do not require regular mowing and only require minimal upkeep such as initial watering, tending of juvenile trees and weed control.
6. Cremated remains interred in the designated gravesite shall be contained in a biodegradable container that is non-retrievable. Alternatively, cremated remains may be placed directly into the earth.
7. No headstone or memorial, marker, stone, vase, tribute or any structure temporary or otherwise may be placed or erected at the gravesite.
8. Charges for natural earth burials are to be based on cost recovery.

Document Control			
Owner	Chief Executive Officer	Division	Corporate & Community Services
Reviewer	Executive Manager	Approval	Council
Document Compliance			
Legislation			
Other			
Document Management			
Version #	Effective Date	Sections Modified (if applicable)	
1	9 February 2010	Adopted	
2	29 April 2025	Policy reviewed and reformatted	

PUBLIC ELECTRONIC NOTICE BOARD – MESSAGES

Purpose

To provide clear guidelines for the messages which can be displayed on the Shire of Plantagenet's (the Shire's) public electronic notice board.

Policy

1. The Council will allow messages to be displayed on the Shire's public electronic notice board, which relate to:
 - a) Shire events, meetings and ceremonies;
 - b) Shire originated community advice;
 - c) local government electoral notifications;
 - d) facility opening and closing times;
 - e) Shire service delivery notifications;
 - f) community based or not-for-profit festivals, events and meetings;
 - g) emergency warnings and advice;
 - h) time and temperature;
 - i) notifications and reminders about Shire surveys and nominations for awards; and
 - j) high impact roadworks and road closures.

Document Control			
Owner	Chief Executive Officer	Division	Corporate & Community Services
Reviewer	Executive Manager	Approval	Council
Document Compliance			
Legislation	Local Government Act 1995		
Other			
Document Management			
Version #	Effective Date	Sections Modified (if applicable)	
1	6 December 2016	Adopted	
2	29 April 2025	Policy reviewed and reformatted	

PUBLIC MEMORIALS AND PLAQUES

Preamble

The Shire of Plantagenet (the Shire) recognises that plaques, memorials and signs are important in celebrating the region, historical events or the contribution of organisations or individuals to the municipality.

Applications for establishment of memorials will be considered on a case-by-case basis in accordance with this policy and requests must state the community benefit of recognising an individual or association with a memorial.

Purpose

This policy seeks to:

- provide a consistent and transparent policy framework to deal sensitively with the placement, installation, construction, alteration, maintenance and removal of a range of memorials, plaques and interpretive signs that commemorate Plantagenet people, culture and history in the Shire of Plantagenet. This includes installations on or in buildings, on roadsides, on municipal roads and other public land;
- provide an equitable decision-making approach to requests for installation of memorials and plaques;
- ensure that proposals are assessed and managed in a timely manner; and
- minimise the risks and environmental impact of plaques and memorials.

Scope

This policy applies to:

- Requests made by Councillors, Shire officers, individuals and community groups; and
- Applications for land owned by the Shire of Plantagenet or under the Council's management.

This policy does not apply to:

- Works of art and their acquisition, maintenance and disposal.
- The naming of parks, roads bridges and public facilities which are covered under the Council Policy *Future Street and Reserve Names*.
- Any plaque or memorial subject to the Council's Cemetery Local Law, as amended from time to time.
- Memorial seating which is specifically addressed in Council Policy *Memorial Seating*.

Definitions

This policy applies to the following categories of plaques, memorials, and interpretive signs installed in Plantagenet on public land, under the Council's care, control and management, and in some instances on private property.

The following definitions are provided:

Memorials are permanent objects or structures designed specifically to commemorate an individual, association or event. A plaque on a raised plinth is considered a memorial. Other examples include a park structure or shelter. They are durable and long-lasting. A sculpture or fabricated artwork may have a dedication, but it is not considered under this Policy.

Plaques are a flat tablet of metal or other durable material which includes text and/or images to commemorate a person, group, event or historical information relative to the location. They have a fixed term life. The provision of an item of infrastructure, such as a bench seat or post, to which the plaque is attached, may be included.

Interpretive signs are information boards which include text and/or images which commemorate an event or a person and/or provide historical context or other information relevant to the location. Interpretive signs may be free standing or attached to another object or building and usually have a fixed term life. All designs must be approved by the Council.

Commemorative trees are trees in honour or memory of a person or persons, organisation or event.

Landscape features may include enhancement of specific areas of existing parks.

Restoration of an existing feature or memorial undertaken by or in conjunction with a community group to commemorate a place, organisation, event or person. This may be a suitable alternative to creating a new memorial.

Roadside fatality memorials are small markers with or without inscription plaques that are provided for the express purpose of commemorating a person or persons who have died in an accident at that site. Specifically refers to memorials on Council roads only and are usually ephemeral.

Permanent memorials are any type of plaque, sign or monument designed and constructed for permanency. They are routinely maintained and refurbished.

Fixed term memorials are any type of plaque, sign, furniture, tree or feature which has a fixed life. It may be maintained but not renewed. Typical life spans are between five and fifteen years.

Ephemeral memorials are temporary memorials or markers with a life span up to one year.

Policy

1. General Guidelines

- 1.1. The Council may initiate the installation of plaques on Council owned buildings or structures to commemorate their opening or a historically significant event.
- 1.2. The Council will consider requests from private individuals and community groups for the installation of plaques, memorials or signs on roads or Council owned facilities or properties in accordance with this policy.
- 1.3. Design, construction or installation of any memorial on land or road owned or managed by the Council will require Council approval.
- 1.4. All costs associated with the establishment, fabrication, construction or the installation of a memorial shall be borne by the proponents. The Council may contribute grant money or in-kind services. However, the responsibility for ensuring sufficient funds are raised by individual contribution, subscription or grants is the responsibility of the proponent.
- 1.5. Memorials, signs and plaques promoted by the Council will be funded by the Council.
- 1.6. The Council will monitor all memorials for condition and safety. The Council will maintain all approved memorials except for roadside fatality memorials.
- 1.7. The significance of time limited memorials and plaques will be reviewed after 15 years from installation or at the fixed term. A decision on whether the plaque, sign or memorial is retained, removed or decommissioned will be undertaken by the Council.
- 1.8. The placement of memorials shall take into account Council planning requirements or other regulatory requirements such as road safety requirements.
- 1.9. New memorials shall not commemorate a person, organisation or event already commemorated elsewhere in the municipality.
- 1.10. Memorials for domestic pets and animals are not permitted on public land or public buildings, unless specifically designated for the purpose. i.e. pet cemetery.

2. Ownership and Life of the Memorial

- 2.1. All memorials or plaques placed on Council owned or managed land are deemed to be assets of the Shire of Plantagenet and managed in accordance with the Shire's policies and procedures.
- 2.2. Where the condition of a memorial or plaque is poor or the site is no longer appropriate, Council officers will take all reasonable measures to contact the person or organisation who initiated the memorial prior to its removal or relocation.

3. Memorials for Council Consideration

- 3.1. Applications for memorial features, plaques, interpretive signs and war memorials to be located on Council owned or managed land (Crown Land) will be restricted to major cultural/heritage figures and places, or in remembrance of war events and sacrifices.

4. Memorial Features

- 4.1. Memorial features such as a park bench/seat, fountain, statue, ornamental feature, sculpture or other significant or unique artwork will be considered on a case-by-case basis in line with the following:
- a) Proposals may be subject to the Council's budgetary processes.
 - b) Management plans and approvals processes, where applicable, shall form part of the determination on whether the location is suitable.
 - c) The Shire of Plantagenet will manage the installation of any memorial.
 - d) If the memorial deteriorates beyond repair, becomes unsightly or unsafe, the Shire may remove it.
 - e) The memorial may be relocated should the site be redeveloped or significantly change in character.
 - f) If the proposed memorial is in the form of public artwork such as a sculpture, tapestry, painting or mural, it must comply with the above criteria and any applicable policies adopted by the Shire of Plantagenet.
 - g) The Shire may choose not to maintain or replace any plaque in the event of damage to or removal of the plaque.
 - h) Council officers will take all reasonable measures to contact the person or organisation who initiated the placement of a plaque prior to its removal or relocation.

5. War Memorials

- 5.1. A war memorial commemorates the sacrifice of those Australians who have died during or from causes attributable to war. They vary widely in form, but all have the intention to remind us of those we have lost to war.
- 5.2. The following applies to war memorials:
- the Mount Barker Sub-branch of The Returned and Services League must be consulted prior to tabling a report to the Council; and
 - proposals may be subject to the Council's budgetary processes.

6. Heritage Recognition Markers

- 6.1. Heritage recognition markers may be installed by the Council on private and public property and communicate the listing of a building, its history and its significance.
- 6.2. The following criteria apply to Heritage recognition markers:
- the property must be State or Local Heritage listed;
 - development approval is required;
 - property owner permission is required; and
 - proposals may be subject to the Council's budgetary processes.
- 6.3. Markers are generally installed directly onto a building or fence. If this is not possible, the marker will be post mounted as close to the building or fence as practical. All wording on markers is developed by Council staff in consultation with the applicant and property owners.

7. Memorial / Commemorative Trees and Plantings

- 7.1. Requests for planting of memorial/commemorative tree(s) in any appropriate street, park or reserve within the Shire of Plantagenet are available based on the following:
- a) They comply with any existing Master Plan or planting design in that place or street and the nursery standards in accordance with the Shire's *Rural Road Verge Vegetation Management Policy*, *Town Street Verge Management Policy* or *Street Tree Plan or Policy* adopted from time to time.
 - b) The type, location and planting of any tree will be managed by the Shire.
 - c) No special care or guarantee of replacement is given.
 - d) To ensure that trees are protected from damage and public risk is minimised, plaques will not be installed on or around trees.

8. Works of Art

- 8.1. Proposed works of art as memorials must demonstrate, in the opinion of the Council, unique design merit.

9. Restoration of Existing Memorials

- 9.1. Proposals to restore or upgrade existing memorials will be considered on a case-by-case basis and will usually involve public consultation prior to approval by the Council.
- 9.2. The addition of new plaques to existing memorials will only be considered if there is a clear connection to the original commemoration. For example, commemorating the restoration of a memorial by a local group on the anniversary of an event.

- 9.3. Prior to commencing any restoration work, every reasonable effort will be made to contact the original proponent. In the event the memorial is damaged or requires repair and the original proponent is no longer in existence, the Council may resolve to repair or remove the memorial.

10. Roadside Memorials

- 10.1. The Shire of Plantagenet recognises that some members of the community may wish to mark the location of a fatal crash on the road network and commemorate the death of individuals with a roadside memorial.
- 10.2. Proposals for roadside memorials will be considered sensitively by the Council but are not encouraged. The views of adjacent residents will be considered.
- 10.3. The type and placement of memorials shall conform to Main Roads WA Policy and Guideless Roadside Memorials and must generally conform to the following principles:
- the siting of the memorial must not distract drivers and shall not be in a position which increases the risk for people wishing to visit the memorial;
 - the memorial must be made of material and installed in such a way as to not cause injury if struck by a vehicle; and
 - the Council cannot accept responsibility for the maintenance of this type of memorial and cannot guarantee against loss or damage or relocation due to road maintenance works or works by other authorities.
- 10.4. Roadside memorials are ephemeral and may be left in place for a maximum of 12 months.

11. Changes to Memorials

- 11.1. The Council reserves the right to relocate memorials in the event of other works at the site. Care will be taken to ensure that individuals and groups are advised in advance of the relocation or temporary removal of any memorial.

12. Application Processes

- 12.1. Initial proposals for plaques, memorials and sign from individuals and groups shall be in writing and addressed to the Chief Executive Officer at the Shire of Plantagenet.
- 12.2. Proposals should address the following key points:
- a) The details of the proponents of the plaque, memorial or sign. If more than one group is involved, then letters of support from these organisations should be included.
 - b) The type of memorial proposed.
 - c) The reason for the memorial and the connection with the Plantagenet district and the specific location proposed.

d) The proposed siting of the memorial and the reason for choosing the site.

e) The approximate cost of the memorial if known and the funding arrangements.

12.3. Council officers will normally consider the initial proposal before referring the application to the Council and, in some cases, written community input relevant to the subject of the plaque and/or memorial will be sought with external organisations appropriate to the subject of the plaque, e.g. Returned and Services League committee, Plantagenet Historical Society.

12.4. Unless otherwise specified, all costs for memorials/plaques are to be borne by the applicant/donor, including any additional costs specific to the installation.

12.5. The Shire will install the memorial/plaque, ensuring consistency with Shire furniture design and/or tree planting guidelines.

12.6. Approved applications will be recorded on a Public Memorials Register for reference. This is not a public register as it will contain applicant details.

Document Control			
Owner	Chief Executive Officer	Division	Corporate & Community Services
Reviewer	Executive Manager	Approval	Council
Document Compliance			
Legislation			
Other	<ul style="list-style-type: none">• Rural Road Verge Vegetation Management Council Policy• Town Street Verge Council Policy		
Document Management			
Version #	Effective Date	Sections Modified (if applicable)	
1	28 January 2020	Adopted	
2	xxxxxx 2025	Policy reviewed and reformatted	

PURCHASING POLICY

Purpose

The Shire of Plantagenet (the Shire) is committed to delivering the objectives, principles and practices outlined in this Policy, when purchasing goods, services or works to achieve the Shire's strategic and operational objectives.

Policy

1. Objectives

1.1. The Shire's purchasing activities will achieve the following objectives:

- a) The attainment of best value for money.
- b) Sustainable benefits, such as environmental, social and local economic factors are considered in the overall value for money assessment.
- c) Consistent, efficient and accountable processes and decision-making.
- d) Fair and equitable competitive processes that engage potential suppliers impartially, honestly and consistently.
- e) Probity and integrity, including the avoidance of bias and of perceived and actual conflicts of interest.
- f) Compliance with the *Local Government Act 1995*, Local Government (Functions and General) Regulations 1996, as well as any relevant legislation, Codes of Practice, Standards and the Shire of Plantagenet's Policies and procedures.
- g) Risks identified and managed within the Shire of Plantagenet's Risk Management framework.
- h) Records created and maintained to evidence purchasing activities in accordance with the State Records Act and the Shire of Plantagenet's Record Keeping Plan.
- i) Confidentiality protocols that protect commercial-in-confidence information and only release information where appropriately approved.

2. Ethics and Integrity

2.1. The Shire of Plantagenet's Code of Conduct applies when undertaking purchasing activities and decision making. Elected Members and employees must observe the highest standards of ethics and integrity and act in an honest and professional manner at all times.

- 2.2. When advertising a tender, the Shire of Plantagenet's advertisement details must include the following wording 'Canvassing of Councillors by tenderers will automatically disqualify the tenderer'.

3. Value for Money

- 3.1. Value for money is achieved through the critical assessment of price, risk, timeliness, environmental, social, local economic and qualitative factors to determine the most advantageous supply outcome that contributes to the Shire of Plantagenet achieving its strategic and operational objectives.
- 3.2. The Shire of Plantagenet will apply value for money principles when assessing purchasing decisions and acknowledges that the lowest price may not always be the most advantageous.
- 3.3. Assessment of value for money will consider the following:
- a) All relevant Total Costs of Ownership and benefits including transaction costs associated with acquisition, delivery, distribution, as well as other costs such as but not limited to holding costs, consumables, deployment, training, maintenance and disposal.
 - b) The technical merits of the goods or services being offered in terms of compliance with specifications, contractual terms and conditions and any relevant methods of assuring quality. This includes but is not limited to an assessment of compliances, tenderers resources available, capacity and capability, value-adds offered, warranties, guarantees, repair and replacement policies, ease of inspection, ease of after sales service, ease of communications etc.
 - c) Financial viability and capacity to supply without the risk of default (competency of the prospective suppliers in terms of managerial and technical capabilities and compliance history).
 - d) A strong element of competition by obtaining a sufficient number of competitive quotations wherever practicable and consistent with this Policy.
 - e) The safety requirements and standards associated with both the product design and the specification offered by suppliers and the evaluation of risk arising from the supply, operation and maintenance.
 - f) The environmental, local economic and social benefits arising from the goods, services or works required, including consideration of these benefits in regard to the supplier's operations, in accordance with this Policy and any other relevant Shire of Plantagenet Policy.
 - g) Providing opportunities for businesses within the Shire of Plantagenet's boundaries to quote wherever possible.

4. Purchasing Thresholds

- 4.1. Where the value of procurement (ex. GST) for the value of the contract over the full contract period (including options to extend) is, or is expected to be:

Threshold Level (ex GST)	Requirements
Up to \$10,000	Seek at least one verbal or written quotation from a suitable supplier.
\$10,001 to \$25,000	Seek at least 2 written quotes (Executive Manager to sign-off where only one quote is obtained or CEO if quote was directly requested by the relevant Executive Manager).
\$25,001 to \$250,000	Seek at least three (3) written quotes (CEO to sign off where less than three (3) written quotes are obtained).
More than \$250,000	Conduct a public tender or other public procurement process or seek at least three (3) quotations from an appropriate exempt arrangement.
Emergency Purchases (Within Budget) Refer to Clause 5	<p>Where goods or services are required for an emergency response and are within scope of an established contract, the emergency supply must be obtained from the Panel or existing contract using relevant unallocated budgeted funds.</p> <p>Where due to the urgency of the situation, a contracted or tender exempt supplier is unable to provide the emergency supply or compliance with this Purchasing Policy would cause unreasonable delay, the supply may be obtained from any supplier capable of providing the emergency supply.</p> <p>However, an emergency supply is only to be obtained to the extent necessary to facilitate the urgent emergency response and must be subject to due consideration of best value for money.</p>
Emergency Purchases (No budget allocation) Refer to Clause 5	<p>Where no relevant budget allocation is available for an emergency purchasing activity then, in accordance with s.6.8 of the Local Government Act 1995, the Shire President must authorise, in writing, the necessary budget adjustment prior to the expense being incurred.</p> <p>The CEO is responsible for ensuring that an authorised emergency expenditure under s.6.8 is reported to the next ordinary Council Meeting.</p> <p>The Purchasing Practices prescribed for Emergency Purchases (within budget) above, then apply.</p>

- 4.2. The CEO may override the policy threshold requirements relating to the number of quotations to be sought where circumstances dictate.
- 4.3. Where it is considered beneficial, tenders may be called in lieu of seeking quotations for purchases under the tender threshold (excluding GST). If a decision to seek public tenders for Contracts of less than the tender threshold, a Request for Tender process that entails all the procedures for tendering outlined in this policy must be followed in full.
- 4.4. To satisfy the thresholds in clause 5A, quotations may be sought from a mix of sources, including:
- a) from a pre-qualified panel of suppliers which may include WALGA Preferred Supplier Contracts; or
 - b) via WALGA's eQuotes web based procurement system; or
 - c) other suppliers that are accessible under another tender exempt arrangement; or
 - d) other suppliers in the open market.
- 4.5. The Shire uses a number of suppliers/contractors such as mechanical parts suppliers, plumbers and electricians who have developed a good awareness of the Shire's facilities and infrastructure over a period of years. It is acknowledged that day to day expenditures may be made through such suppliers without invoking the need to obtain quotations.

5. Emergency Purchases

- 5.1. Emergency purchases are defined as the supply of goods or services associated with:
- a) a local emergency and the expenditure is required (within existing budget allocations) to respond to an imminent risk to public safety, or to protect or make safe property or infrastructure assets; or
 - b) a local emergency and the expenditure is required (with no relevant available budget allocation) to respond to an imminent risk to public safety, or to protect or make safe property or infrastructure assets in accordance with s.6.8 of the *Local Government Act 1995* and Functions and General Regulation 11(2)(a); or
 - c) a State of Emergency declared under the *Emergency Management Act 2005* and therefore, Functions and General Regulations 11(2)(aa),(ja) and (3) apply to vary the application of this policy.
- 5.2. Time constraints, administrative omissions and errors do not qualify for definition as an emergency purchase. Instead, every effort must be made to research and anticipate purchasing requirements in advance and to allow sufficient time for

planning and scoping proposed purchases and to then obtain quotes or tenders, as applicable.

6. Expressions of Interest

6.1. Expressions of Interest (EOI) will be considered as a prerequisite to a tender process where the required supply involves one or more of the following criteria:

- a) Inability to sufficiently scope or specify the requirement.
- b) There is significant variability for how the requirement may be met.
- c) There is potential for suppliers to offer unique solutions and / or multiple options for how the purchasing requirement may be obtained, specified, created or delivered.
- d) Subject to a creative element.
- e) Provides a procurement methodology that allows for the assessment of a significant number of potential tenderers leading to a shortlisting process based on non-price assessment.

6.2. All EOI processes will be based upon qualitative and other non-price information only.

7. Panels of Pre-Qualified Suppliers

7.1. The Shire will consider creating a Panel of Pre-qualified Suppliers ('Panel') when a range of similar goods and services are required to be purchased on a continuing and regular basis.

7.2. Part of the consideration of establishing a panel includes:

- a) There are numerous potential suppliers in the local and regional procurement related market sector(s) that satisfy the test of 'value for money'.
- b) The Panel will streamline and will improve procurement processes.
- c) The Shire has the capability to establish a Panel and manage the risks and achieve the benefits expected of the proposed Panel.

7.3. Should the Shire determine that it is beneficial to create a Panel, it must do so in accordance with Part 4, Division 3 of the Local Government (Functions and General) Regulations 1996. This ensures that clear and consistent information is communicated to all suppliers, including selection criteria, conditions of contract, specifications and price schedules (as required).

7.4. Pre-Qualified Suppliers will be appointed to the Panel based on value of money principles, their suitability to provide the goods and/or services as per the weighted

evaluation criteria. The number of suppliers appointed to a Panel will be dependent on the requirements.

7.5. Panel members will be engaged based on various factors such as value for money, suitability, availability, familiarity with a particular project and/or specialist requirements.

7.6. The Shire may engage non-Panel members as required, subject to normal quotation and tendering requirements in accordance with the Regulations.

8. Exemptions

8.1. Regulation 11(2) of the Local Government (Functions and General) Regulations 1996 outlines the situations which are exempt from the requirement to publicly invite tenders.

8.2. A Purchase Order is unnecessary in the case of the following:

- fees and payment due under any Act of Parliament;
- insurances;
- payments made through payroll;
- fees and payments that are statutory, this includes bank fees;
- other statutory damages, infringements and penalties;
- loan repayments;
- freight and postal charges and fuel cards;
- goods purchased from petty cash;
- payments made under any Awards binding upon the Council;
- licenses and rights of copyright, payment of which is not avoidable at law;
- Awards against the Council by a court of law for damages, penalties and royalties;
- payments for subscriptions and publications;
- credit card payment requests;
- refunds and reimbursements;
- if an emergency situation arises after hours as determined by a Shire officer on call; and
- utilities.

9. Sole Source of Supply (Monopoly Suppliers)

9.1. The procurement of goods and/or services available from only one private sector source of supply, (i.e. manufacturer, supplier or agency) is permitted without the need to call competitive quotations provided that there must genuinely be only one source of supply. Every endeavour to find alternative sources should be made.

10. Contract Renewals, Extensions and Variations

10.1. Where a contract has been entered into as the result of a publicly invited tender process, then Functions and General Regulation 21A applies.

10.2. For any other contract, the contract must not be varied unless:

- a) The variation is necessary in order for the goods or services to be supplied and does not change the scope of the contract; or
- b) the variation is a renewal or extension of the term of the contract where the extension or renewal options were included in the original contract.
- c) The CEO will make a determination on how to deal with circumstances where the contract value increases over a policy threshold level, due to a variation or extension.

10.3. Upon expiry of the original contract, and after any options for renewal or extension included in the original contract have been exercised, the Shire is required to review the purchasing requirements and commence a new competitive purchasing process in accordance with this Policy.

11. Anti-Avoidance

11.1. The Local Government shall not enter two or more contracts of a similar nature for the purpose of splitting the value of the contracts to take the value of consideration below the level of the tender threshold amount thereby avoiding the need to publicly tender.

12. Sustainable Procurement

12.1. The Shire is committed to implementing sustainable procurement by providing a preference to suppliers that demonstrate sustainable business practices (social advancement, environmental protection and local economic benefits).

13. Local Economic Benefit

13.1. The Shire encourages the development of competitive local businesses within its boundary first, and second within its broader region.

13.2. The Shire has adopted a Regional Price Preference Policy, which will be applied when undertaking all purchasing activities over \$30,000.00.

Document Control			
Document Responsibilities			
Owner	Chief Executive Officer	Business Unit	Corporate & Community Services
Reviewer	Executive Manager	Approval	Council
Document Compliance			
Legislation	<ul style="list-style-type: none">Local Government Act 1995Local Government (Functions and General) Regulations 1996 Part 4Division 1 – Purchasing Policies for Local GovernmentEmergency Management Act 2005		
Other			
Document Management			
Version #	Effective Date	Sections Modified (if applicable)	
1	1 December 2020	Adopted	
2	XX XXX 2025	Policy reviewed and reformatted and additional detail included around Purchase Order exemptions.	

RATES DEBT COLLECTION – HARDSHIP

Purpose

This policy outlines the criteria for assessing applications of cases of financial hardship.

It acknowledges that ratepayers may at times encounter genuine financial hardship and seeks to provide a level of relief for those ratepayers by not adding additional debt recovery charges and penalty interest, subject to the conditions specified in this policy.

Policy

1. An application from a ratepayer claiming extreme financial hardship will be assessed by the CEO. No further debt recovery action will be taken while the application is under consideration.
2. If in the opinion of the CEO, the ratepayer is experiencing genuine extreme financial hardship, cessation of further debt recovery action and cancellation of interest accruing on overdue amounts may be permitted, subject to:
 - a) the ratepayer's circumstances being supported by a written application and an original letter from a financial counsellor or a qualified financial body (a fully accredited member of Financial Counsellors Association of Western Australia or Bank);
 - b) a payment arrangement approved by the CEO being entered into on the basis that the total debt outstanding at the date the arrangement is made will be extinguished within three years or less from the date of that arrangement. This amount does not include future rates and charges;
 - c) the applicant being the owner or co-owner of the property and liable for payment of rates and charges and also occupy the property as his/her main place of residence;
 - d) the ratepayer not being a company or trustee;
 - e) the ratepayer not being bankrupt or subject to a bankruptcy petition; and
 - f) no revenue being derived from the property that is the subject of the application.
3. Should the ratepayer default on the agreed arrangement by three (3) payments or more, the agreement will be terminated, interest charges will be reapplied, and debt recovery proceedings will resume.

Document Control			
Owner	Chief Executive Officer	Division	Corporate & Community Services
Reviewer	Executive Manager	Approval	Council
Document Compliance			
Legislation	Local Government Act 1995		
Other			
Document Management			
Version #	Effective Date	Sections Modified (if applicable)	
1	3 December 2019	Adopted	
2	XX XXX 2025	Policy reviewed and reformatted	

RATING – RATE INCENTIVE PRIZE

Purpose

To encourage Shire of Plantagenet (Shire) ratepayers to pay the full amount of their assessed rates and charges by the due date.

Policy

1. An annual rate incentive prize will be offered by the Council.
2. Prizes will be awarded to first, second (and third if applicable) entries drawn at random.
3. Only ratepayers with their rate account paid in full by the due date will be eligible.
4. One entry per assessment notice (not per ratepayer) is to be entered into the draw.
5. Rateable properties which any Council Member, senior member of staff or manager has an ownership interest in will be ineligible. The Shire reserves the right to decide, in its absolute discretion whether or not the entry requirements have been fulfilled.
6. Sponsors will be sourced for prizes. The Shire CEO is authorised to offer a prize entitling access to Shire facilities to a maximum of \$250.00.

Document Control			
Owner	Chief Executive Officer	Division	Corporate & Community Services
Reviewer	Executive Manager	Approval	Council
Document Compliance			
Legislation	Local Government Act 1995		
Other			
Document Management			
Version #	Effective Date	Sections Modified (if applicable)	
1	October 2006	Adopted	
2	29 April 2025	Policy reviewed and reformatted	

RECORD KEEPING

Purpose

To establish a framework for the reliable and systematic management of Shire records in accordance with legislative requirements and best practice standards.

Scope

This policy applies to all Council business and relates to both physical and electronic Council records. It applies to all Council staff, councillors, and contractors undertaking outsourced functions on behalf of the Council.

Definitions

Record is any record of information, in any medium, including letters, files, emails, word processed documents, databases, photographs, file note of conversations and social media messages.

State Record is a record created or received by:

- a government organisation; or
- a government organisation employee in the course of the employee's work for the organisation but does not include an exempt record.

Employee means all people employed by the Shire of Plantagenet whether permanent, fixed term or casual contract of service, apprentice or trainee.

Policy Statements

1. Policy Principles

1.1. Creation of Records

Councillors and staff will create full and accurate records, in the appropriate format, of the Shire's business decisions and transactions to meet all legislative, business, administrative, financial, evidential and historical requirements.

1.2. Security and Protection of Records

All records are to be categorised as to their level of sensitivity and adequately secured and protected from violation, unauthorised access or destruction, and kept in accordance with necessary retrieval, preservation and storage requirements.

1.3. Access to Records

Access to the Shire's records by staff will be in accordance with designated access and security classifications. Access to the Shire's records by the general public will be in

accordance with the *Freedom of Information Act 1992* and other applicable legislation. Access to the Shire's records by Councillors will be via the Chief Executive Officer.

1.4. Appraisal, Retention and Disposal of Records

All records kept by the Shire will be retained and disposed of in accordance with the General Disposal Authority for Local Government Records, produced by the SRO.

1.5. Capture and Control of Records

All records created and received in the course of Shire business are to be captured at the point of creation, regardless of format, with required supporting data, into appropriate record keeping and business systems that are managed in accordance with sound record keeping principles.

2. Record Keeping Responsibilities

2.1. All Council employees and Councillors need to be aware of record keeping requirements. The record keeping obligations of Council staff and Councillors include:

- a) learning how and where records are kept;
- b) making records to support the conduct of business activities;
- c) creating records as evidence of Council operations that are otherwise not created;
- d) forwarding records to the Central Records for capture into the official Records Keeping System;
- e) not destroying Council records; and
- f) following appropriate records management procedures.

3. Outsourcing of Service Delivery

3.1. Contracts should provide that the contractor create records that meet the Shire's accountability requirements, in relation to the functions performed or services provided for the Shire. Such contracts should also provide that the contractor maintain those records according to standards acceptable to the Shire, for as long as the records are required and return them to the Shire when the contract expires.

Document Control			
Owner	Chief Executive Officer	Division	Corporate & Community Services
Reviewer	Executive Manager	Approval	Council
Document Compliance			
Legislation	Freedom of Information Act 1992		
Other			
Document Management			
Version #	Effective Date	Sections Modified (if applicable)	
1	10 April 2012	Adopted	
2	29 April 2025	Policy reviewed and reformatted	

REGIONAL PRICE PREFERENCE

Purpose

To encourage the use of competitive local businesses in goods, services and works purchased or contracted on behalf of the Shire of Plantagenet (the Shire).

Definitions

A **Local Business or Contractor** is a local business or contractor that meets the following conditions:

- locally established with two years prior, direct experience in the business of the subject matter in the tender/quotation;
- has had a permanent office in the Prescribed Area, for at least six months prior to bids being sought;
- has permanent staff based in the Prescribed Area; and
- bidding and management/delivery of the majority of the contract outcomes will be carried out from the business location in the Prescribed Area.

The **Prescribed Area** is the local government area of Plantagenet.

Policy Statements

1. A price preference will apply to quotations of \$30,000.00 value or greater and all tenders invited by the Shire of Plantagenet, for the supply of goods and services and construction services, unless the Council resolves that this policy not apply to a particular quotation or tender.
2. The following levels of preference will be applied under this policy:
 - 2.1. Goods or services up to a maximum price reduction of \$50,000.00: 10% to businesses located within the Prescribed Area.
 - 2.2. Construction (building) services up to a maximum price reduction of \$50,000.00: 5% to businesses located within the Prescribed Area.
 - 2.3. Goods or Services, including construction (building) services, up to a maximum price reduction of \$500,000.00, if the Council is seeking tenders for the provision of those goods or services for the first time, due to those goods or services having been, until then, undertaken by the Council: 10% to businesses located within the Prescribed Area.
3. The levels of preference outlined in section 2 above, will be applied as either a regional business preference or as a regional content preference, as follows:

3.1. Regional Business Preference

- a) This preference enables businesses/contractors within local governments in the Prescribed Area to claim a price preference for their whole bid, regardless of the origin of the labour or materials, as all labour and materials are deemed to be regional content.
- b) The price of the bids from the local businesses/contractors will be reduced (for evaluation purposes only), by the amounts set out in section 2 of this policy.

3.2. Regional Content Preference

- a) This preference provides an incentive for businesses/contractors outside the Prescribed Area to purchase goods, services and construction from within the Prescribed Area. The preference applies to the value of the goods, materials or services purchased from within the Prescribed Area and used in the Shire of Plantagenet and are referred to as 'Regional Content'. The preference percentages are as set out in section 2 of this policy.
 - b) Travel and accommodation costs associated with sending staff or sub-contractors from outside the Prescribed Area to work on a regional contract, are not considered regional content and are not eligible for the 'Regional Content Preference'.
 - c) Materials and labour items for which the Regional Content Preference is requested are to be specifically itemised and quantified in the tender / quotation;
 - d) Businesses outside the Prescribed Area, who claim that they will use regional businesses (Regional Content) in the delivery of the contract outcomes, will be required, as part of the contract conditions, to demonstrate that they have actually used them. A penalty for non-compliance will be included in the contract conditions.
4. Businesses wishing to claim a price preference in section 3 must complete a preference questionnaire/response form that is distributed with each quotation of \$30,000.00 value or greater and which is also included in tender documentation. Eligible businesses within the Prescribed Area must clearly state their full business location and postal address.
5. Price is only one factor to be considered when assessing quotations and tender submissions. Consideration will also be given to the principles outlined in the Purchasing Council Policy.

Document Control			
Document Responsibilities			
Owner	Chief Executive Officer	Business Unit	Corporate & Community Services
Reviewer	Executive Manager	Approval	Council
Document Compliance			
Legislation	Local Government Act 1995		
Other	Future Road Names and Reserves Register		
Document Management			
Version #	Effective Date	Sections Modified (if applicable)	
1	19 July 2016	Adopted	
2	29 April 2025	Policy reformatted	

RELATED PARTY DISCLOSURES

Purpose

This policy specifies the Shire of Plantagenet's (the Shire's) Key Management Personnel, who are subject to disclosure under the requirements of Accounting Standards Board 124 - Related Party Disclosures, and to define ordinary citizen transactions, which are exempted from reporting.

Policy

1. In regard to the requirements of Australian Accounting Standards Board 124 - Related Party Disclosures, the Council will:

1.1. Specify the following as Key Management Personnel:

- a) All Council Members
- b) Chief Executive Officer
- c) Deputy Chief Executive Officer
- d) Executive Manager Corporate & Community Services
- e) Executive Manager Development & Regulatory Services
- f) Executive Manager Infrastructure & Assets
- g) Manager Community and Recreation Services

1.2. Exempt the following transactions from reporting:

- a) Paying rates and Emergency Services Levy (and associated charges and interest).
- b) Fines.
- c) Use of Shire owned facilities such as the Recreation Centre, Mount Barker Swimming Pool, Mount Barker Library, halls, public buildings, parks, ovals and other public open spaces (whether charged a fee or not).
- d) Attending Council functions that are open to the public.

Document Control			
Owner	Chief Executive Officer	Division	Corporate & Community Services
Reviewer	Executive Manager	Approval	Council
Document Compliance			
Legislation	Local Government Act 1995		
Other	Accounting Standards Board 124 - Related Party Disclosures		
Document Management			
Version #	Effective Date	Sections Modified (if applicable)	
1	18 July 2017	Adopted	
2	29 April 2025	Policy reviewed and reformatted	

RISK MANAGEMENT

Purpose

This policy states the Shire of Plantagenet's (the Shire's) intention to identify potential risks before they occur so that impacts can be minimised or opportunities realised; ensuring that the Shire achieves its strategic and corporate objectives efficiently, effectively and within good corporate governance principles.

It seeks to:

- a) align with and assist the implementation of all Shire policies;
- b) optimise achievement of the Shire's vision, mission, strategies, goals and objectives;
- c) provide transparent and formal oversight of the risk and control environment enabling effective decision making;
- d) enhance risk versus return within the Shire's risk appetite;
- e) embed appropriate and effective controls to mitigate risk;
- f) achieve effective corporate governance and adherence to relevant statutory, regulatory and compliance obligations;
- g) enhance organisational resilience; and
- h) identify and provide for the continuity of critical operations.

Definitions

Risk is the effect of uncertainty on objectives, noting an effect is a deviation from the expected – positive or negative; and objectives can have different aspects (such as financial, health and safety and environmental goals) and can apply at different levels (such as strategic, organisation-wide, project, product or process).

Risk Management is coordinated activities to direct and control an organisation with regard to risk.

Risk Management Process is systematic application of management policies, procedures and practices to the activities of communicating, consulting, establishing the context, identifying, analysing, evaluating, treating, monitoring and reviewing risk.

Policy

1. Principles

- 1.1. It is the Shire's Policy to achieve best practice (aligned with AS/NZS ISO 31000:2018 Risk Management – Guidelines), in the management of all risks that may affect the Shire meeting its objectives.
- 1.2. Risk management functions will be resourced appropriately to match the size and scale of the Shire's operations and will form part of the strategic, operational and project responsibilities and be incorporated within the Shire's Integrated Planning Framework.

1.3. This policy applies to Council Members, executive management and all employees and contractors involved in any Shire operations.

2. Roles and Responsibilities

2.1. The CEO is responsible for:

- a) implementation of this policy;
- b) reporting on the performance of risk management; and
- c) review and improvement of this policy and the Shire's Risk Management Framework at least biennially, or in response to a material event or change in circumstances.

2.2. The Shire's Risk Management Framework outlines in detail all roles and responsibilities associated with managing risks within the Shire.

3. Risk Assessment and Acceptance Criteria

3.1. The Shire quantified its broad risk appetite through the development and endorsement of the Shire's Risk Assessment and Acceptance Criteria. The criteria are included within the Risk Management Framework and as a component of this policy.

3.2. All organisational risks are to be assessed according to the Shire's Risk Assessment and Acceptance Criteria to allow consistency and informed decision making. For operational requirements such as projects or to satisfy external stakeholder requirements, alternative risk assessment criteria may be utilised, however these cannot exceed the organisations appetite and are to be noted within the individual risk assessment.

4. Monitor and Review

4.1. The Shire will implement and integrate a monitor and review process to report on the achievement of the Risk Management Objectives, the management of individual risks and the ongoing identification of issues and trends.

4.2. This policy will be kept under review by the Shire's Management Team. It will be formally reviewed biennially.

5. Risk Assessment and Acceptance Criteria

5.1. Measures of Consequence

Rating (Level)	Health	Financial Impact	Service Interruption	Compliance	Reputational	Property	Environment	Project
Insignificant (1)	Near miss. Minor first aid injuries	Less than \$20,000	No material service interruption	No noticeable regulatory or statutory impact	Unsubstantiated, low impact, low profile or 'no news' item	Inconsequential damage.	Contained, reversible impact managed by on site response	Small variation to cost, timelines, scope or quality of objectives and required outcomes
Minor (2)	Medical type injuries	\$20,001 - \$100,000	Short term temporary interruption – backlog cleared < 1 day	Some temporary non compliances	Substantiated, low impact, low news item	Localised damage rectified by routine internal procedures	Contained, reversible impact managed by internal response	5-10% increase in time or cost or variation to scope or objective requiring

Rating (Level)	Health	Financial Impact	Service Interruption	Compliance	Reputational	Property	Environment	Project
								managers approval
Moderate (3)	Lost time injury <30 days	\$100,001 - \$500,000	Medium term temporary interruption – backlog cleared by additional resources < 1 week	Short term non-compliance but with significant regulatory requirements imposed	Substantiated, public embarrassment, moderate impact, moderate news profile	Localised damage requiring external resources to rectify	Contained, reversible impact managed by external agencies	10 -20 % increase in time or cost or variation to scope or objective requiring Senior Management approval
Major (4)	Lost time injury >30 days	\$500,001 - \$1,000,000	Prolonged interruption of services – additional resources; performance affected < 1 month	Non-compliance results in termination of services or imposed penalties	Substantiated, public embarrassment, high impact, high news profile, third party actions	Significant damage requiring internal and external resources to rectify	Uncontained, reversible impact managed by a coordinated response from external agencies	20 — 50 % increase in time or cost or significant variation to scope or objective requiring restructuring of project and Executive Management or Council approval
Catastrophic (5)	Fatality, permanent disability	More than \$1,000,000	Indeterminate prolonged interruption of services – non-performance > 1 month	Non-compliance results in litigation, criminal charges or significant damages or penalties	Substantiated, public embarrassment, very high multiple impacts, high widespread multiple news profile, third party actions	Extensive damage requiring prolonged period of restitution Complete loss of plant, equipment and building	Uncontained, irreversible impact	>50% increase in cost or timeline, or inability to meet project objectives requiring the project to be abandoned or redeveloped

5.2. Measures of Likelihood

Level	Rating	Description	Frequency
5	Almost Certain	The event is expected to occur in most circumstances	More than once per year
4	Likely	The event will probably occur in most circumstances	At least once per year
3	Possible	The event should occur at some time	At least once in 3 years
2	Unlikely	The event could occur at some time	At least once in 10 years
1	Rare	The event may only occur in exceptional circumstances	Less than once in 15 years

5.3. Risk Matrix

Consequence Likelihood		Insignificant	Minor	Moderate	Major	Catastrophic
		1	2	3	4	5
Almost Certain	5	Moderate (5)	High (10)	High (15)	Extreme (20)	Extreme (25)
Likely	4	Low (4)	Moderate (8)	High (12)	High (16)	Extreme (20)
Possible	3	Low (3)	Moderate (6)	Moderate (9)	High (12)	High (15)
Unlikely	2	Low (2)	Low (4)	Moderate (6)	Moderate (8)	High (10)
Rare	1	Low (1)	Low (2)	Low (3)	Low (4)	Moderate (5)

5.4. Risk Acceptance Criteria

Risk Rank	Description	Criteria	Responsibility
LOW	Acceptable	Risk acceptable with adequate controls, managed by routine procedures and subject to annual monitoring	Operational Manager
MODERATE	Monitor	Risk acceptable with adequate controls, managed by specific procedures and subject to semi-annual monitoring	Operational Manager
HIGH	Urgent Attention Required	Risk acceptable with effective controls, managed by senior management / executive and subject to monthly monitoring	Executive Manager / CEO
EXTREME	Unacceptable	Risk only acceptable with effective controls and all treatment plans to be explored and implemented where possible, managed by highest level of authority and subject to continuous monitoring	CEO / Council

5.5. Existing Control Ratings

Rating	Foreseeable	Description
Effective	There is <u>little</u> scope for improvement.	Processes (controls) operating as intended and aligned to policies / procedures. Subject to ongoing monitoring. Reviewed and tested regularly.
Adequate	There is <u>some</u> scope for improvement.	Processes (controls) generally operating as intended, however inadequacies exist. Nil or limited monitoring. Reviewed and tested, but not regularly.
Inadequate	There is a <u>need</u> for improvement or action.	Processes (controls) not operating as intended. Processes (controls) do not exist, or are not being complied with. Have not been reviewed or tested for some time.'

Document Control			
Owner	Chief Executive Officer	Division	Corporate & Community Services
Reviewer	Executive Manager	Approval	Council
Document Compliance			
Legislation	Local Government Act 1995		
Other	AS/NZS ISO 31000:2018 Risk management – Guidelines		
Document Management			
Version #	Effective Date	Sections Modified (if applicable)	
1	21 April 2020	Adopted	
2	29 April 2025	Policy reviewed and reformatted	

SELF SUPPORTING LOANS

Purpose

To assist clubs and organisations in improving community based facilities.

Policy

1. Eligible Organisations

- 1.1. Loans will only be considered for applicants that are incorporated bodies occupying land either owned by, or vested in the care, control and management of a community organisation.
- 1.2. Organisations are to provide:
 - a) three years audited financial statements;
 - b) a business plan for the proposed term of the loan that clearly; demonstrates an ability to repay;
 - c) their constitution;
 - d) minute agreeing to borrow funds;
 - e) whatever security or guarantees that the Council considers appropriate to ensure that the loan is repaid; and
 - f) any other information that the Council requires.

2. Funding Details

- 2.1. Funds will only be provided for capital works on the subject land when ownership of all infrastructure ultimately vests in the community (notwithstanding established leasehold arrangements).
- 2.2. Loans will be provided at the State Treasury interest rate when drawing the loan and will be fixed for the duration of the loan. The term of the loan is not to exceed ten years. Loan repayments will be amortised and will generally be six monthly unless the applicant organisation requests otherwise. An additional Government Guarantee Fee will be payable six monthly at rates that may vary during the term of the loan.

3. Approval Process

- 3.1. The Council will consider the approval of the loan on the following basis:
 - a) demonstrated ability to repay;
 - b) maximum loan amount 50% project cost or 50% of value of completed structure (not to include land content);
 - c) stability, sound management, membership base, community accessibility and longevity of applicant organisation.
 - d) funds being used for capital improvements; and
 - e) debenture security over assets (including lease) of organisation if considered appropriate.

3.2. Organisations will be required to:

- a) enter into a Deed of Agreement for the period of the loan repayments;
- b) pay all costs associated with the preparation of documents concerning the raising of the loan; and
- c) insure and keep insured premises where the premises are security over repayment of a loan.

3.3. Any proposal to lend to a community organisation that has not been included in the Council's annual budget must be advertised for one month in accordance with Section 6.20 (2) of the *Local Government Act 1995*.

4. Other

4.1. Funds will only be released after documentary proof of significant expenditure (or committed expenditure) is submitted.

4.2. The Council will seek any remedy available to it under law in terms of the recovery of delinquent instalments of loans.

4.3. The Council will consider the objectives of the Council Policy Financial Management - Borrowing Program and Asset Financing in determining applications for self-supporting loans.

Document Control			
Owner	Chief Executive Officer	Division	Corporate & Community Services
Reviewer	Executive Manager	Approval	Council
Document Compliance			
Legislation	Local Government Act 1995		
Other	<ul style="list-style-type: none">Asset Management Council PolicyCommunity Capital Assistance Grants Council PolicyFinancial Assistance (Operating) Inc Orgs and Clubs Council Policy		
Document Management			
Version #	Effective Date	Sections Modified (if applicable)	
1	14 May 2002	Adopted	
2	XX XXX 2025	Policy reviewed and reformatted	

SEXUAL HARASSMENT

Purpose

The Shire of Plantagenet strongly supports the concept that every employee, elected member and member of the public employed by or engaged in business with the Council, has a right to do so in an environment which is free from sexual harassment and the Council is committed to providing such an environment.

To be read in conjunction with the Discrimination, Harassment and Bullying Management Directive.

Definitions

Sexual harassment is any conduct of a sexual and/or sexist nature (whether physical, verbal or non-verbal) which is unwelcome and unsolicited and/or rejection of which may disadvantage a person in their employment or their life in general.

The following examples may constitute sexual harassment when they are considered and expressed as being offensive to an employee, elected member or member of the general public:

- Deliberate and unnecessary physical contact such as patting, pinching, fondling, kissing, brushing against or touching.
- Subtle or explicit demands for sexual activities or molestation.
- Intrusive enquiries into a person's private life.
- Uninvited and unwelcome jokes that have a sexual and/or sexist undertone.
- Unsolicited leers and gestures of a sexual nature and the display within the workplace of sexually offensive material.

Policy

1. General

- 1.1. The Shire of Plantagenet considers sexual harassment to be an unacceptable form of behaviour which will not be tolerated and recognises that sexual harassment is unlawful.
- 1.2. The Shire of Plantagenet recognises that sexual harassment can undermine health, performance and self-esteem of individuals and has the potential to create a hostile and intimidating environment. The Council is therefore committed to any action which ensures the absence of sexual harassment in the workplace including general training of the workforce and specific training for officers identified to deal with complaints. Appropriate disciplinary action will be taken against any individual found to be engaging in such conduct.
- 1.3. Any complaints of sexual harassment made against any person associated with the Council will be viewed seriously, treated confidentially, and thoroughly investigated by appropriately trained persons.

- 1.4. Any person making a claim of sexual harassment will be protected at all times. No transferring of staff or face to face meetings between the complainant and the person whose behaviour has been found to be unwelcome will occur without the prior consent of both parties.
- 1.5. An employee whose health or work performance has been affected by sexual harassment will not have their employment status or conditions disadvantaged in any way, as a result thereof.
- 1.6. A formal complaints/grievance procedure follows and will be utilised to effectively resolve complaints of sexual harassment.

2. Complaints/grievance procedure

- 2.1. All complaints of sexual harassment will be treated confidentially and resolved promptly.
- 2.2. Wherever possible, the handling of complaints and resolution of such will be at the workplace where they occurred. Care will be taken throughout the investigation to ensure that neither the complainant nor the alleged harasser is victimised.
- 2.3. It is recognised that cases of sexual harassment may occur between supervisor and employee and as such, alternative methods of raising complaints are provided for by this procedure.
- 2.4. A complaint of sexual harassment may be lodged with any of the following persons:
 - a) Immediate Supervisor/Manager (except where this person is the alleged harasser);
 - b) Executive Manager (except where this person is the alleged harasser);
 - c) Chief Executive Officer (if the alleged harasser is an Executive Manager or the Shire President); and
 - d) Shire President (only if the alleged harasser is the Chief Executive Officer or Councillor).
- 2.5. A person receiving a complaint of sexual harassment will:
 - a) Decide, in consultation with the complainant, whether the matter can be resolved at this level or whether it should be referred to a more senior level of management. Assure the complainant that all details of the complaint will be treated confidentially and allow the person to decide on procedure;
 - b) Prepare a confidential report for the Chief Executive Officer on the nature of the complaint and ensure follow up reports are provided until the matter is resolved, (or, in the event that the complaint relates to the Chief Executive Officer, the report shall be prepared for the Shire President); and
 - c) Ensure no information regarding the complaint is discussed outside this procedure.
- 2.6. The person handling the complaint, whether it is the person who received the complaint, or a more senior person will, with the approval of the complainant:

- a) As soon as possible, advise the alleged harasser of the nature of the complaint and provide an opportunity for that person to comment. Where appropriate the alleged harasser should be invited to discontinue any perceived unwelcome behaviour;
- b) Advise the alleged harasser of the right to contact his/her Union or advocate for advice and representation;
- c) Advise the alleged harasser that no disciplinary action will be taken without the person being given the opportunity to be heard; and
- d) Keep simple, brief notes of the facts of the interviews held with both the complainant and alleged harasser.

2.7. If it is not possible to resolve the complaint, simply by discussion with the complainant and the alleged harasser:

- a) The matter will be investigated and where the complainant or the alleged harasser is a member of a Union, the Union may be party to the investigation; and
- b) All documentation relating to the complaint will remain confidential and will not be produced or made available for inspection, except on the order of a Court or a request from the Commissioner of Equal Opportunity.

2.8. During the period of the investigation of a case of serious sexual harassment:

- a) The investigation is to be conducted in a manner that is fair to all parties and all parties are to be given a fair and reasonable opportunity to put their case, to have witnesses in attendance and to respond to any proposed adverse findings that may be made against them;
- b) If requested by either party or by management, alternative working arrangements may be made; and
- c) Any reasonable request by either party for legal or union representation shall not be denied.
- d) Parties involved in the investigation will be offered the support of EAP and / or counselling / mediation services.

2.9. If, following investigation and resolution, a complaint is judged to have been proved:

- a) Remedial action will be taken; and
- b) A record of the detail of the remedial action will remain on the employee's personal file for a period of twelve months, whereupon the record will be destroyed unless otherwise decided by the Chief Executive Officer (or Shire President in the event that the complaint relates to the Chief Executive Officer).

2.10 If, following investigation, a complaint is judged to have been unproven, the complainant will be counselled and if it is considered that the complaint was made frivolously or maliciously, disciplinary action may be taken against the complainant.

2.11 Continued reference to a complaint and its aftermath could be considered as either a continuing or new incident of harassment.

2.12 While it is the Council's wish to attempt to deal with complaints of harassment internally, no employee will be penalised for bringing this complaint to

any appropriate external statutory body unless that complaint is ultimately proven to be made frivolously or maliciously.

Document Control			
Owner	Chief Executive Officer	Division	Corporate & Community Services
Reviewer	Executive Manager	Approval	Council
Document Compliance			
Legislation	<ul style="list-style-type: none">• Sex Discrimination Act 1984• Racial Discrimination Act 1975• Disability Discrimination Act 1992• Age Discrimination Act 2004• Australian Human Rights Commission Act 1986• Equal Opportunity Act 1984 (WA)• Industrial Relations Act 1979 (WA)• Work Health and Safety Act 2020 (WA)• Work Health and Safety (General) Regulations 2022 (WA)		
Other	<ul style="list-style-type: none">• Code of Practice: Workplace Bullying (2006)• Code of Practice: Workplace Behaviour (WA) (2022)• Code of Practice: Managing Psychosocial Hazards at Work (2022)		
Document Management			
Version #	Effective Date	Sections Modified (if applicable)	
1	24 February 2004	Adopted	
2	XX XXX 2025	Policy reviewed, reformatted and legislation and codes added	

SPORTING AND COMMUNITY ORGANISATIONS USING COUNCIL AND VESTED LAND – RATEABILITY

Purpose

To ensure that all organisations leasing property owned by or vested in the Shire of Plantagenet (the Shire) Council are treated equitably with regard to rating and other charges.

Policy

- Any organisation leasing or renting land and/or facilities from the Council shall be rateable, unless provisions of the *Local Government Act 1995* provide for them to be non-rateable.
- The Shire will waive the applicable Shire rates on properties leased to the following until the expiry of the respective leases:

Facility	Lessee
Narpanup Golf Course	Narpanup Golf Course
Kendenup Golf Course and Country Club	Kendenup Country Club
Mount Barker Communications Tower	Bevan Lang
Mount Barker Railway Station	Mount Barker Tourist Bureau Inc
Lower Floor – Mount Barker Community Resource Centre (excl Library)	Mount Barker Community Resource Centre / Baptist Union of WA
Upper Floor – Mount Barker Community Resource Centre	Department of Training and Workforce Development – South Regional TAFE

- The Council has determined by separate resolutions that the rateability of the following leased properties will be categorised as follows:
 - Charitable Status – 100% Waiver: Annual declaration required to exempt from rates due to charitable or public purpose status.

Facility	Lessee
Kendenup First Responders Building Hall	St John Ambulance
Mount Barker Child Care Centre	Wanslea Early Learning and Development Inc
Cattle Saleyards – Shed	Albany Cattle Association

- State Government Service or Purpose – 100% Waiver: Annual declaration required to exempt from rates due to charitable or public purpose status.
- Service to the public on behalf of the Shire – 100% Waiver

Facility	Lessee
Mount Barker Historic Museum	Plantagenet Historical Society
Woogenellup Hall	Woogenellup Progress Association Inc
Porongurup Hall	Porongurup Community Association Inc

- d) Other Service Organisation/Sporting Club: Organisations in this category are to be given either a 50% or 100% waiver on their rates to reflect that there is some level of community benefit provided. The decision is to be made by the Council when the respective leases are renewed.

The degree to which rates should be waived for each of these is considered on a case-by-case basis, but as a guide the following factors are to be considered:

- Benefits to the Shire as a whole of activities being provided.
- Number of active participants or people benefitting;
- Structure of organisation (ie: not for profit or other, membership fees payable, base of operations);
- Ability to recoup costs, such as commercial kitchen, bar or fee for service.
- Exclusion/inclusion of sections of the community.

Facility	Lessee	Specific Council decision regarding a waiver
Mount Barker Speedway	Mount Barker Speedway Club	100%
Mount Barker Men's Shed	Plantagenet Men's Shed	100%
West Plantagenet Pony Club Grounds	West Plantagenet Pony Club	100%
Narpanup Golf Course	Narpanup Golf Course	
Mount Barker Communications Tower	Bevan Lang	
Kendenup Golf Course and Country Club	Kendenup Country Club	
Portion of Mount Barker Railway Station	Mount Barker Tourist Bureau Inc	
Mount Barker Tennis Courts	Mount Barker Tennis Club	100%
Arts Centre (Mitchell House)	Mitchell House Arts Centre Inc	100%
Kendenup Tennis Courts	Kendenup Tennis Courts	100%
Lower Floor – Mount Barker Community Resource Centre (excl Library)	Mount Barker Community Resource Centre / Baptist Union of WA	
Lot 150 Beverley Road, Kendenup	Kendenup Community Grounds	100%
Sounness Park Clubrooms	Plantagenet Sporting Club	100%
Plantagenet District Hall	Plantagenet Players	100%
Upper Floor – Mount Barker Community Resource Centre	Department of Training and Workforce Development – South Regional TAFE	
Frost Park Training Track	Mount Barker Turf Club Inc	50%
Part Lot 250 Memorial Road Mount Barker (Former HACC Building)	Empowering Plantagenet Seniors	100%
Portion of Mount Barker Railway Station	Wilson Inlet Catchment Committee Inc	100%
Portion of Mount Barker Railway Station	Oyster Harbour Catchment Group	100%

- e) Commercial entities or persons running a profit-making business - Lessee responsible for rates

Facility	Lessee
Cattle Saleyards – Cattle Yards	M&J Mitchell Pty Ltd
Plantagenet Medical Centre	Glea Medical Pty Ltd

4. Future leases with sporting and community groups or other persons/organisations will include provision for the lessee to be responsible for paying the applicable Shire rates,

however a decision is to be made regarding any waiver applicable in accordance with Clause 3 of this policy.

5. All lessees are responsible for fees and charges otherwise applicable, such as rubbish collection charges and the Emergency Services Levy.
6. Lessees responsible for paying Shire rates are not eligible to apply for an annual donation, in lieu of the rates, as a part of the Shire's annual Financial Assistance Grants process.

Document Control			
Owner	Chief Executive Officer	Division	Corporate & Community Services
Reviewer	Executive Manager	Approval	Council
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