



**Un Llais Cymru
One Voice Wales**

Community & Town Councils Digital Guidance

Conducting Council Business Digitally

January 2025

Contents

Introduction	3
Key Operational Areas	3
Finance	3
Customer Relationship Management (CRM)	3
Online Form and Documents	4
General Considerations for Digital Operations.....	4
Artificial Intelligence (AI)	4
Version History	5

Introduction

Community and Town councils in Wales can efficiently manage various operational functions electronically by leveraging digital tools and practices, in accordance with relevant legislation. This document offers suggestions for areas where councils could apply digital approaches. Additionally, it outlines considerations for the use of newly available Artificial Intelligence tools.

Key Operational Areas

Finance

Electronic Publication of Accounts: Councils have a legal duty to publish their annual audit returns electronically via their website. This establishes the expectation that financial records are managed digitally, with a clear encouragement to publish the results.

Financial Management Software: Councils are advised to implement financial management software for efficient record-keeping, budgeting, and expenditure tracking. Numerous commercially available products and platforms have been specifically designed for use by community and town councils. For smaller councils with simpler operations, managing finances via a spreadsheet tool such as Microsoft Excel is a viable option. This approach ensures that all financial transactions are recorded and managed digitally.

Online banking allows councils to streamline transactions, payments, and income management. Efficient financial control requires proper review and approval processes for all income and expenditure.

Transparent Reporting: Financial information should be easily accessible on the council website. This includes not only annual audit returns and accounts but potentially regular budget updates, and details of expenditure in line with the council's financial regulations. Councils must ensure any financial systems they use are compliant with the Accounts and Audit (Wales) Regulations 2014.

Customer Relationship Management (CRM)

Centralised Contact Information: Councils must publish a generic email address, telephone number, and postal address. These should be monitored consistently, and requests actioned promptly. A CRM system could help to manage community queries, track communications, and ensure timely responses.

Website Forms: Online forms on the council website can be used for residents to submit requests, report issues, and provide feedback. These could be linked to a CRM system to track requests to completion.

Data Protection: Any system must meet the requirements of data protection legislation including the Data Protection Act 2018.

Feedback Mechanisms: CRM systems can facilitate surveys, polls, and other tools that allow the council to gather information on public perception and their needs.

Online Form and Documents

Online Application Forms: Councils can provide online application forms for grants or for any services they provide. This could include booking facilities and applying for local grants or funding. Grant and service applications should allow for the electronic submission of supporting documents.

General Considerations for Digital Operations

Training: Provide regular training for council members and staff on the use of digital tools and platforms. This will help to improve their confidence and competence.

Security: Implement appropriate security measures to protect all electronic systems and data.

Accessibility: Ensure that all digital solutions are accessible to everyone, regardless of their technical skills or any disabilities.

All digital solutions must strictly comply with the applicable legislation, including the Local Government Acts, the Well-being of Future Generations (Wales) Act 2015, and data protection regulations. Additionally, the Welsh Language (Wales) Measure 2011 should be taken into consideration.

Regular Review: Digital strategies and tools should be reviewed regularly to ensure they meet the evolving needs of the council and the community.

Artificial Intelligence (AI)

Recent advancements in artificial intelligence (AI) have significantly influenced public administration and could be considered even by small community councils.

Key developments include enhanced AI-driven data analysis tools, sophisticated chatbots, generative AI tools for drafting and editing documents and improved AI ethics frameworks.

Community councils in Wales can leverage these AI advancements to improve their operational efficiency and community engagement. AI tools can assist in data analysis, allowing councils to make more informed decisions based on comprehensive community data. Chatbots could be deployed on council websites to handle frequently asked questions and direct residents to essential information, thereby improving service delivery. Moreover, AI's role in document management and website content creation can streamline administrative tasks.

To ensure ethical use, councils must adhere to transparency and data protection regulations. Regular training for staff and councillors on AI applications is crucial to

maximize these tools' benefits and understand their potential impact on council operations. By integrating AI effectively, community councils can operate more transparently and efficiently, aligning with legal and community requirements.

Version History

	Date	Issuer	Reason	Review Date
V1	30/1/25	Justin Horrell	Initial Version	30/1/26



Ariennir gan
Lywodraeth Cymru
Funded by
Welsh Government