

Freedom of Information Act 2000

Definition document for Charter Trustees

This guidance gives examples of the kinds of information that we would expect Charter Trustees to provide in order to meet their commitments under the model publication scheme.

We would expect these bodies to make the information in this definition document available unless:

- they do not hold the information;
- the information is exempt under one of the FOIA exemptions or Environmental Information Regulations exceptions, or its release is prohibited under another statute;
- the information is readily and publicly available from an external website; such information may have been provided either by the Charter Trustees or on their behalf. The Charter Trustees must provide a direct link to that information;
- the information is archived, out of date or otherwise inaccessible; or,
- it would be impractical or resource-intensive to prepare the material for routine release.

The guidance is not meant to give an exhaustive list of everything that should be covered by a publication scheme. The legal commitment is to the model publication scheme, and authorities should look to provide as much information as possible on a routine basis.

Publishing datasets for re-use

Public authorities must publish under their publication scheme any dataset they hold that has been requested, together with any updated versions, unless they are satisfied that it is not appropriate to do so. So far as reasonably practicable, they must publish it in an electronic form that is capable of re-use.

If the dataset or any part of it is a relevant copyright work and the public authority is the only owner, the public authority must make it available for re-use under the terms of a specified licence. Datasets in which the Crown owns the copyright or the database rights are not relevant copyright works.

The Datasets Code of Practice recommends that public authorities make datasets available for re-use under the [Open Government Licence](#).

The term 'dataset' is defined in section 11(5) of FOIA. The terms 'relevant copyright work' and 'specified licence' are defined in section 19(8) of FOIA. The ICO has published [guidance](#) on the dataset provisions in FOIA. This explains what is meant by "not appropriate" and "capable of re-use".

<p>Who we are and what we do Organisational information, structures, locations and contacts.</p>
<p>We would expect information in this class to be current information only.</p> <ul style="list-style-type: none"> • Names of Trustees and Chairperson • Staffing Arrangements • Contact Details <p>This should give some indication at least of the role of the contact, phone number and where used e mail address. It always assists to provide a named contact where this can be done.</p>
<p>What we spend and how we spend it Financial information relating to projected and actual income and expenditure, procurement, contracts and financial audit.</p>
<p>We would expect as a minimum that financial information for the current and previous financial year should be available.</p> <ul style="list-style-type: none"> • Precept • Annual accounts • Audit of accounts • Loans sanctioned • Financial standing orders • Grants made • Staff and trustees' allowances and expenses <p>Details of the allowances and expenses that can be incurred or claimed. It should include the total of the allowances and expenses</p>

incurred by or paid to individual senior staff and trustees by reference to categories. These categories should be produced in line with the trustees' policies, practices and procedures and will be under headings like travel, subsistence and accommodation.

What our priorities are and how we are doing

Strategies and plans, performance indicators, audits, inspections and reviews.

We would expect information in this class to be available at least for the current and previous year.

- **Any reports indicating main priorities and progress against them**

How we make decisions

Decision making processes and records of decisions.

We would expect information in this class to be available at least for the current and previous year.

- **Minutes of meetings of the Charter Trustees**

We would expect minutes of meetings of the trustees and minutes of similar meetings where decisions are made about providing services to be readily available. This excludes information that is properly regarded as private to the meeting.

- **Reports presented to the Trustees for consideration**

Information presented to meetings of the Trustees. This excludes information that is properly regarded as private to the meeting.

Our policies and procedures

Current written protocols, policies and procedures for delivering our services and responsibilities.

We would expect information in this class to be current information only.

- **Policies and procedures for the conduct of the Trustees' business**

Procedural standing orders, internal guidance about the division of responsibilities between committees and delegated authority, policies on communications between trustees and members of staff.

- **Policies and procedures for the provision of services**

Policies of the Trustees that affect the manner in which services are provided, including those relating to the provision of information. This will include any policies and procedures for handling requests for information.

- **Policies and procedures about the recruitment and employment of staff**

A number of policies, for example equality and diversity, will cover both the provision of services and the employment of staff.

- **Customer service standards and complaint procedure**

Standards for providing services, including the complaint procedure. Complaints procedures will include those covering requests for information and operating a publication scheme.

- **Charging regimes and policies**

Details of any statutory charging regimes should be provided. Charging policies should include charges made for information routinely published. They should clearly state what costs are to be recovered, the basis on which they are made, and how they are calculated.

- **Records management and personal data policies**

This will include information security policies, records retention, destruction and archive policies, and data protection (including data sharing) policies.

Lists and Registers

We expect this to be information contained only in currently maintained lists and registers.

- **Any Lists or Registers that the Trustees may be required to produce in the conduct of their business**

Where a public authority is obliged to maintain a register and to make the information in it available for inspection by the public, it is accepted that in most circumstances that the existing provisions covering access will suffice. We would expect however that authorities do publicise which public registers they hold and how the

information in them is to be made public. Where registers contain personal information, authorities must ensure that this is protected by the data protection principles.

- **Any property asset list**
- **List of regalia (if not included in asset list)**
- **Register of Trustees' financial and other interests**

The services we offer

Information about the services we offer, leaflets, guidance and newsletters produced for the public and businesses.

- **Mayoral engagements**
- **Details of the services for which the Trustees are entitled to recover a fee together with those fees.**
- **Leaflets**
- **Involvement of Trustees in local affairs**
- **Events**