

PUBLIC

AGENDA ITEM NO:

**DERBYSHIRE COUNTY COUNCIL**

**COUNCIL MEETING**

**3 June 2015**

**Report of the Strategic Director of Corporate Resources**

**THE COUNCILLOR DEVELOPMENT CHARTER  
(Council Services)**

**1 Purpose of Report**

For Council to approve the adoption of the Councillor Development Charter.

**2 Information and Analysis**

At its meeting on 24 March 2015, Cabinet considered a review of the activity of the Member Development Working Group and agreed to recommend that the Council should adopt the Councillor Development Charter.

The Councillor Development Charter promotes best practice in Elected Member development by providing a focus and external benchmark against which the Council can measure its performance and identify areas for improvement in this area.

The Charter (see **APPENDIX 1**) involves an accreditation process set against standards which have been developed in conjunction with the LGA and other regions around the country. The Charter takes into account and complements the Investors in People Quality Standard which has already been achieved by the Council.

The Charter is designed to:

- Encourage councils to develop an effective strategy or approach to Elected Member development
- Recognise those councils that have developed an effective approach
- Encourage councils to continue that development and share their experiences and learning.

The Charter will support the Council in building Elected Member capacity in-line with what is recognised as good practice. This not only supports Elected Members individually in carrying out their key roles in the Council but will also assist in ensuring that they are appropriately skilled to demonstrate leadership within their local communities. The Charter demonstrates that the Council is committed to developing its Elected Members.

Benefits of the Charter to Elected Members and the Council include:

- It provides a framework and focus for Elected Member learning and development.
- It facilitates and supports moves by the Council to strengthen its political and community leadership.
- Individual Elected Members benefit by improving their understanding of their strategic and local responsibilities.
- The Council benefits from the links between Elected Member development, Members' roles and the Council Plan, and
- Charter accreditation would provide evidence that the Council is committed to growing its capacity at Member level.

The Charter requires that the Council makes a public commitment by the Leader and Chief Executive signing the Charter Statement of Commitment on behalf of the Council. If agreed, the Member Development Working Group will:-

- Identify a councillor and an officer who will have responsibility for ensuring that the work progresses.
- Put forward a councillor and an officer to train as internal assessors to assist the council in working towards accreditation and to support the external accreditation process. It is proposed that the Member Development Working Group identify the appropriate individuals.
- Produce an action plan detailing how the council will work towards achieving accreditation by December 2015.
- Ensure the involvement of all councillors in our work towards accreditation.

Three years after initial accreditation the Council would be due for re-assessment and at that point could elect to be assessed against the Charter Plus award which will encourage continuous improvement through more rigorous evidence requirements.

### **3 Financial Considerations**

External assessment against the Councillor Development Charter will incur expenditure of £999 plus VAT and associated travel costs. In addition, as a condition of the Charter, the Council must identify and train two internal assessors (one Elected Member and one officer) at an estimated cost of £125 per person.

The cost of assessment will be met from the Member Development budget and the cost for the training of internal assessors will be met by the relevant officer and Member training budgets.

### **4 Other Considerations**

In preparing this report the relevance of the following factors has been considered – Legal & Human Rights, Human Resources, equality and diversity, health, environmental, transport, property and prevention of crime and disorder considerations.

### **5 Officer's Recommendation**

That the Council agrees to adopt the Councillor Development Charter as detailed in the report.

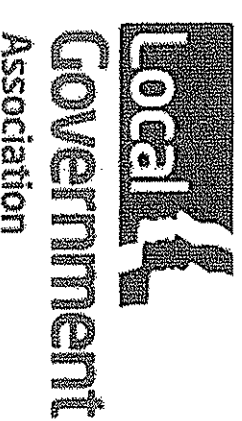
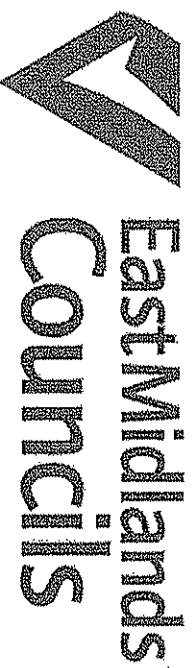
**JUDITH GREENHALGH**

**STRATEGIC DIRECTOR OF CORPORATE RESOURCES**



# Councillor Development Charter

December 2013





# THE COUNCILLOR DEVELOPMENT CHARTER & CHARTER PLUS

## The challenge facing councillors

There are many challenges facing local government in *Rewiring Public Services*<sup>1</sup> the LGA sets these out as -

- Rejuvenating local democracy so that public services can help communities to meet people's future needs and aspirations, and rebuilding democratic participation
- Adult social care and health and the need for local government to have a universal offer for all citizens, including families, neighbours and friends who are informal carers
- Children's services and the need to enable a better connection between schools and other education providers and the needs of local employers and place-based public service budgets approach to boost early intervention and prevention
- Financial sustainability providing a new financial model that would give people a meaningful say over local taxation, spending and borrowing
- Economic growth is the great political and social problem. Young people need jobs, businesses need customers, high streets need hope.

Councillors have a key role in meeting these challenges both as the strategic leaders of the council as an organisation and also in providing leadership to their local communities and places. Meeting these challenges at the local level will require councillors to transform both their organisations and change the way they relate to their communities and places both individually and collectively. Yet if councillors are to play their part they need to be effective in their roles. The council's processes supporting them also need to be appropriate and relevant to their needs.

## The importance of councillor development

It is unlikely that any individual will become a councillor (or cabinet member) already having all the skills, knowledge and understanding they need to be effective in that role. They will need some training and development not only to acquire those abilities but to keep them current and relevant to the changing environment and context.

The House of Commons committee report *Councillors on the Frontline*<sup>2</sup> also highlights the importance of training and development not only to support councillors but also, by demonstrating that support is available, to encourage others to come forward to stand for election. The report also highlighted the importance of developing the "soft skills" councillors need (e.g. communication and influencing skills) as well as providing effective induction programmes for newly elected councillors.

<sup>1</sup> *Rewiring Public Services* campaign was launched by the LGA at its conference in July 2013. For more information go to the LGA website: <http://www.local.gov.uk/campaigns/>

<sup>2</sup> *Councillors on the Frontline* report published by the Communities and Local Government Committee of the House of Commons in Dec 2012. For more details go to: <http://www.publications.parliament.uk/pa/cm/201213/cmselect/cmcomloc/432/43202.htm>

## **The Councillor Development Charter**

The Councillor Development Charter and Charter Plus exist to

- Encourage councils to develop an effective strategy or approach to councillor development
- Recognise those councils that have developed an effective approach
- Encourage councils to continue that development and share their experiences and learning.

As a first step councils are asked to commit to the Charter - to make a commitment to develop the necessary strategy and processes to support effective councillor development. Once achieved the Charter is held for three years during which time the Council can use the charter symbol. At the end of this period there is a reassessment to ensure the council is still at least meeting the Charter requirements. At this point, if the council decides it has made sufficient progress, it could opt to be assessed for the Charter Plus award.

There are four essential criteria to achieving the Charter:

1. There is a clear commitment to councillor development
2. The Council has a strategic approach to councillor development
3. Learning and development is effective in building capacity
4. The council's processes support councillors in their role as leaders of their local communities.

Within each of these there are a number elements and requirements to demonstrate that the criteria are being met. These do not dictate what should be in the strategy, the nature of the content or the delivery mechanisms that should be used. The emphasis is on ensuring that all councillors are appropriately developed and supported so that they can be effective in their roles.



## Foreword

### The East Midlands Regional Councillor Development Charter

The East Midlands Regional Councillor Development Charter has been developed with the help and support of other regions in the country and the LGA.

#### What is it and why do we need it?

Local authorities in the region who are dedicated to meeting the needs of their communities must also be committed to developing their councillors to enable them to effectively engage in the modernisation of local government. The evolving local government agenda has placed an increasing emphasis on an authority's need to rethink their approach to councillor learning and development and ongoing support to the councillor role.

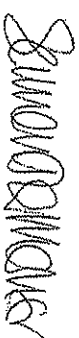
As a consequence, many local authorities have gone a long way in developing councillor Learning and Development Strategies. Policies and Programmes. The approach, levels of commitment and progress, however, varies considerably across the region.

The East Midlands Charter has been based on a national template, but written to reflect the culture of the region. It sets out a clear process for accreditation and a framework of standards of good practice for all councils to aspire to and achieve. The achievement of the standards will be recognised by an accreditation process and public acknowledgment of the success of the authority will be demonstrated at an annual celebration event.

The purpose of the Charter is, therefore, a vehicle to improve the corporate performance of local authorities, through the development of its councillors.



**Cllr Jon Collins**  
Chair, EMC



**Samantha Maher**  
Director, HR & Cllr Development, EMC



## **The East Midlands Regional Councillor Development Charter**

The Regional Charter for Councillor Development aims to promote best practice in councillor development. The Charter has an accreditation process set against standards, which have been developed in conjunction with the LGA and other regions around the country.

The Charter for Councillor Development Standards has taken into account the Investors in People National Quality Standard.

There are six key stages in the East Midlands Regional Councillor Development Charter.

### **Guidance: Process for Accreditation against the Charter Standards**

#### **Stage 1: Signing up to the Charter**

Local authorities that want to participate are required to sign up to the charter to demonstrate their commitment to achieving the charter standards and improving council performance, through the development of their councillors.

#### **Stage 2: Action Plan**

It is recognised that each council will have a variety of learning and development processes already in place for councillors. There is an opportunity at this stage to assess the existing situation against the standards and develop an Action Plan that enables the council to work towards achieving accreditation. Each council will be expected to set target dates for achieving the standards.

#### **Stage 3: Evidence Collection**

Councils will be expected to compile a portfolio of evidence to demonstrate their compliance to the standards.

#### **Stage 4: Assessment**

When a council considers that it has everything in place to demonstrate that it meets the standards, an on-site assessment will take place by a trained councillor peer and officer from the region. The team will assess the evidence in the portfolio against the standards and conduct a small number of interviews with councillors and officers.

#### **Stage 5: Awarding the Charter**

When the council has been assessed and achieved the standards, they will be awarded the Charter. An annual celebration event will be held where all those councils who have achieved the standards will be invited to receive their Charter.

#### **Stage 6: Re-assessment**

Councils are expected to maintain good practice and demonstrate improvements since achieving the Charter. A re-assessment will therefore take place within a minimum of 3 years.



# Regional Councillor Development Charter

## Statement of Commitment: *Charter*

On behalf of ..... council we agree to:

- Commence work today towards the achievement of the Regional Councillor Development Charter.
- Make a public announcement in the council of our intention to achieve the Charter.
- Obtain full council agreement.
- Identify a councillor and an officer who will have responsibility for ensuring that the work progresses.
- Put forward a councillor and an officer to train as assessors to support the council in working towards accreditation/request external support from the region to enable the council to work towards accreditation.
- Produce an Action Plan detailing how the council will work towards achieving accreditation.
- Ensure the involvement of all councillors in our work towards accreditation.

Councillor: .....

Position: .....

Officer: .....

Position: .....

Date:



East Midlands  
Councils



Government  
Association



# Regional Councillor Development Charter

## Statement of Commitment for *Charter Plus*

On behalf of ..... council we agree to:

- Commence work towards the achievement of the Charter Plus Level of the Regional Councillor Development Charter.
- Make a public announcement in the council of our intention to achieve Charter Plus.
- Obtain full council agreement.
- Identify a councillor and an officer who will have responsibility for ensuring that the work progresses.
- Put forward a councillor and an officer to train as assessors to support the council in working towards accreditation/request external support from the region to enable the council to work towards charter plus accreditation.
- Produce an Action Plan detailing how the council will work towards achieving charter plus accreditation.
- Ensure the involvement of all councillors in our work towards charter plus accreditation.

Councillor: .....

Position: .....

Officer: .....

Position: .....

Date:





## **THE COUNCILLOR DEVELOPMENT CHARTER & CHARTER PLUS**

### **Guidance: Requirements and Examples of Evidence**

There are four essential criteria to achieving the Charter:

1. There is a clear commitment to councillor development
2. The Council has a strategic approach to councillor development
3. Learning and development is effective in building capacity.
4. The council's processes support councillors in their role as leaders of their local communities.

Within each of these there are a number elements and requirements to demonstrate that the criteria are being met. These do not dictate what should be in the strategy, the nature of the content or the delivery mechanisms that should be used. The emphasis is on ensuring that all councillors are appropriately developed and supported so that they can be effective in their roles

The following lists are intended to indicate the sorts of evidence that can be used to show that the council's approach to councillor development meets the Charter criteria. Note that:

- There is no need to show all the evidence listed
- This does not preclude the use of other evidence that may not be listed
- Some are likely to be stronger indicators than others
- Some pieces of evidence may be applicable to more than one criteria elements.



## Councillor Development Charter & Charter Plus: Examples of Evidence

Criterion 1: There is a clear commitment to councillor development			
Elements	Requirements for Charter	Requirements for Charter Plus	Examples of Evidence
1.1. Political and managerial leadership is committed to the development of councillors and have strategies in place to improve councillor and council performance.	<ul style="list-style-type: none"> <li>• Clear commitment from the top political and managerial leadership</li> <li>• Established all party training and development task group that meets regularly</li> <li>• There is a clear strategy which is embedded into practice</li> <li>• Named councillor(s) and officer(s) responsible for councillor development</li> </ul>	<ul style="list-style-type: none"> <li>• Clear commitment from top political and managerial leadership to share development opportunities across local government tiers (including with parish &amp; town councils)</li> <li>• Evidence that the Strategy is regularly reviewed</li> <li>• Evidence of forward planning</li> </ul>	<ul style="list-style-type: none"> <li>• Signed commitment to achieving the Charter</li> <li>• Councillors are included in the IIP Award questioning process</li> <li>• Strategies are in place to support councillor development.</li> <li>• A cross party Learning and Development Reference Group</li> <li>• Intranet / Internet access</li> <li>• Political and managerial leadership can describe strategies to develop councillors.</li> <li>• Confirmation and examples from councillors that political and managerial leaders are committed to their development.</li> <li>• Existence of a Councillor Development Policy.</li> <li>• Cross party Reference Group remit.</li> <li>• Reference Group minutes of meetings showing active involvement of councillors in the learning and development process.</li> </ul>



1.2	Access to learning and development takes into account diversity of needs: political and managerial leadership can describe specific actions that they have taken to ensure equal access to learning and development opportunities for all councillors.	<ul style="list-style-type: none"> <li>• Timing of events takes account of cultural and personal circumstances</li> <li>• Councillors have fair access and equality of opportunity for development</li> <li>• The development programme includes a range of delivery methods to meet the different learning styles of councillors</li> <li>• Councillors are updated on developments in a range of ways</li> </ul>	<ul style="list-style-type: none"> <li>• Statistical analysis of cultural &amp; personal circumstances</li> </ul>	<ul style="list-style-type: none"> <li>• Statistical evidence of attendance.</li> <li>• A range of learning and development options to meet individual needs are provided and promoted.</li> <li>• Councillors confirm that action is taken to accommodate diversity of need.</li> <li>• The Councillor development plan evidences flexibility and consideration of the timing of development events</li> </ul>
1.3	The council has a designated budget for councillor development which is adequate to meet priority development needs.	<ul style="list-style-type: none"> <li>• Budget is explicit and clearly identified and monitored</li> </ul>	<ul style="list-style-type: none"> <li>• The budget is properly reviewed, set and prioritised by the cross party task group</li> </ul>	<ul style="list-style-type: none"> <li>• Budget reports.</li> <li>• Information that informs councillors of the existence of the budget.</li> <li>• Minutes of meetings that shows councillors involvement in setting and monitoring the budget.</li> <li>• Councillors confirm that the budget is sufficient to meet priority development needs.</li> </ul>



1.4	Officer/ s of the council have responsibility for co-ordinating councillor development	<ul style="list-style-type: none"> <li>• Appropriate and adequate staffing resources are in place to support councillor development</li> </ul>	<ul style="list-style-type: none"> <li>• Member development and support staff have their own skills development programme</li> <li>• Member development and support staff are involved in regional and national learning networks</li> </ul>	<ul style="list-style-type: none"> <li>• Officer/s job description.</li> <li>• Named officer/s in Councillors' Handbook or other information source that is distributed to councillors and officers.</li> <li>• Councillors are able to name the officer who supports their learning and development.</li> <li>• Those responsible for planning learning and development activities for councillors are able to demonstrate their understanding of learning and development in a political context.</li> <li>• Cross party Reference Group remit.</li> <li>• Reference Group minutes of meetings showing active involvement of councillors in the learning and development process.</li> </ul>
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Criterion 2 The Council has a strategic approach to councillor development			
Elements	Requirements for Charter	Requirements for Charter Plus	Examples of Evidence
2.1  There is a written and up to date councillor learning and development strategy and Councillor led strategy for councillor induction and development and representative councillors are involved in its formulation, implementation, monitoring and evaluation ( possibly through an established all party task group or other all party committee)	<ul style="list-style-type: none"> <li>Decisions about member development are taken by some form of formally constituted body of councillors</li> <li>Strategy identifies priority development needs and makes stated and clear links with council's aims and objectives</li> <li>Clear induction process and training programme for all new councillors</li> </ul>	<ul style="list-style-type: none"> <li>Evaluation feedback contributes to review and further development of the strategy</li> </ul>	<ul style="list-style-type: none"> <li>Written strategy</li> <li>Minutes of meetings showing monitoring and evaluation of the strategy.</li> <li>Councillor Reference Group can describe their involvement in formulating the strategy.</li> <li>Overview and Scrutiny Review of the effectiveness of the strategy.</li> <li>Those involved in formulating the strategy can demonstrate how it links to the corporate objectives and the rationale behind stated priorities.</li> <li>Cross party Reference Group remit.</li> <li>Reference Group minutes of meetings showing active involvement of councillors in the learning and development process.</li> </ul>
2.2.  The council has a structured process for regularly assessing councillors' individual learning and development needs based on focused objectives.	<ul style="list-style-type: none"> <li>A process exists to identify individual development needs in the form of a Training Needs Analysis (TNA) or Personal Development Plans (PDPs) and is working effectively</li> </ul>	<ul style="list-style-type: none"> <li>All councillors are offered PDPs and more than half of councillors take them up.</li> <li>Council has a process for diagnostic reviews (e.g. 360 degree reviews or appraisal process) to reflect on strengths and to support progression</li> </ul>	<ul style="list-style-type: none"> <li>Councillor role descriptions</li> <li>Implementation of the political skills framework</li> <li>Extracts from the constitution outlining councillor roles and responsibilities.</li> <li>Councillors can describe how they contribute to the work of the council and their local community.</li> </ul>





2.3	<p>The various councillor roles are clearly defined and outline how they contribute to the achievement of community, political and council objectives.</p>	<ul style="list-style-type: none"> <li>Councillors demonstrate an understanding of the skills and knowledge required in their ward and council wide roles</li> <li>Councillor role descriptions exist and are maintained for all key roles including ward councillor</li> <li>Councillors are clear about what the council is trying to achieve and the part they play in this as councillors</li> </ul>	<ul style="list-style-type: none"> <li>Role descriptions are used to help identify development needs</li> <li>Evidence that councillors are clear about: <ul style="list-style-type: none"> <li>The role of partner bodies</li> <li>The role of other stakeholders</li> <li>Their own role on partner bodies</li> <li>Their own role in relation to other stakeholder bodies</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>System in place to identify individual needs.</li> <li>Learning Styles Analysis.</li> <li>Personal Development Plans</li> <li>360 Degree Appraisals.</li> <li>Training Needs Analysis Proforma.</li> <li>Councillors are able to describe how learning and development activities have helped them to carry out their role and contribute to the achievement of the councils objectives.</li> <li>Individual Learning and Development Plans link with function and corporate objectives.</li> </ul>
2.4.	<p>The council has a structured process for assessing current and future leadership and Executive Team development needs</p>	<ul style="list-style-type: none"> <li>Published process to assess current and future needs</li> <li>Joint regular events/development plan that support the top political and management teams in learning about each other and working effectively together</li> </ul>	<ul style="list-style-type: none"> <li>Portfolio holders and spokespersons have undertaken training appropriate to their portfolio area</li> <li>Evidence of a programme to develop the next generation of leaders</li> </ul>	<ul style="list-style-type: none"> <li>Process in place to assess needs.</li> <li>Learning and Development Plans.</li> <li>360 Degree Leadership Audits.</li> <li>Political leadership development programme.</li> <li>Events that support team building.</li> <li>Joint events for executive and senior management.</li> <li>Succession planning.</li> <li>Community Leadership development courses.</li> <li>The political leadership can describe actions taken to develop political leadership capacity</li> <li>The political and managerial leadership can give examples of how they work together as a team</li> </ul>

<p>2.5</p> <p>There is a Corporate Councillor Learning and Development Plan prioritising activities which brings together all learning and development plans – individuals, committees, political leadership and teams. This plan is able to prioritise activities according to resources and links the development of councillors with the Council's aims and objectives</p>	<ul style="list-style-type: none"> <li>Corporate councillor Learning and Development Plan links to council's aims &amp; objectives and the development of Councillors.</li> </ul>	<ul style="list-style-type: none"> <li>The councillor development plan clearly prioritises learning activities in accordance with the needs of the corporate aims and objectives.</li> </ul>	<ul style="list-style-type: none"> <li>Corporate councillor Learning and Development Plan.</li> <li>Prioritisation document.</li> <li>Councillor Reference Group are able to explain how activities are prioritised.</li> </ul>
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Criterion 3. Learning and development is effective in building capacity				
	Elements	Requirements for Charter	Requirements for Charter Plus	Examples of Evidence
3.1	Investment in learning and development is periodically evaluated in terms of cost and benefits of councillor learning and Development and the impact that it has had on performance for the Councillor, the Council and the Community.	<ul style="list-style-type: none"> <li>Evaluation strategy in place to analyse the effectiveness of councillor development activities</li> <li>Case studies of how learning and development has impacted on performance</li> <li>Political and managerial leadership display a good understanding of both the costs and benefits of development activities and are able to explain why their commitment to councillor development is worthwhile</li> <li>Councillors can describe why they did certain activities, what they learnt and what difference it has made to them carrying out their various roles as an elected member</li> </ul>	<ul style="list-style-type: none"> <li>Analysis of costs and benefits from councillor training and development</li> <li>Some form of impact assessment at the community level exists and is used (e.g. by asking for feedback from partners)</li> </ul>	<ul style="list-style-type: none"> <li>Evaluation Strategy is in place and is effective</li> <li>Analysis of costs and benefits to the council from councillor learning and development.</li> <li>Case studies of how learning and development has impacted on performance.</li> <li>Minutes of meetings, focus groups, questionnaires or interviews involving councillors evaluating the impact of their development on performance.</li> <li>Political and managerial leadership display a good understanding of both the costs and benefits of development activities</li> <li>Political and managerial leadership can provide examples and anecdotal evidence of impact benefits to support their commitment to councillor development</li> </ul>





3.2	Learning is shared with other councillors and where appropriate, with officers and stakeholders to encourage capacity building in the council and a learning organisation culture.	<ul style="list-style-type: none"> <li>Knowledge is shared with their peers, officers and others</li> </ul>	<ul style="list-style-type: none"> <li>There is an effective process for disseminating, sharing and exchanging knowledge in place</li> </ul>	<ul style="list-style-type: none"> <li>Examples of reports, briefing sessions, and information exchange systems used to capture and disseminate learning from learning activities.</li> <li>Programmes of joint learning exchanges.</li> <li>Mentoring arrangements.</li> <li>Hosting Case study visits.</li> <li>Developing councillor champions for topic areas.</li> <li>Councillors can give examples of how they have supported and learned from the development of others.</li> </ul>
3.3	The Council demonstrates a commitment to an effective councillor learning and development programme by implementing improvements to learning and development activities as they are identified.	<ul style="list-style-type: none"> <li>Continuous improvement in the approach to developing people is demonstrated</li> </ul>	<ul style="list-style-type: none"> <li>Links to Evaluation Strategy – what does?</li> <li>Demonstrate that evaluation outcomes inform change and drive continuous improvement</li> <li>A quality assurance process is in place</li> </ul>	<ul style="list-style-type: none"> <li>Written reviews of learning and development activities with recommendations for change.</li> <li>Minutes of meetings, reports, personal statements providing examples of improvements to learning activities.</li> <li>Changes to on-going programmes and rationale for the revisions made</li> <li>Councillors can describe what has been done to improve development activities where improvements were needed.</li> <li>Quality assurance process in place and effective</li> </ul>



Criterion 4 The council's processes support councillors in their role as leaders of their local communities				
	Elements	Requirements for Charter	Requirements for Charter Plus	Examples of Evidence
4.1	The council actively encourages citizenship and publicises the role of councillors as community leaders as part of promoting local democracy and encouraging under represented groups to take up office	<ul style="list-style-type: none"> <li>The council holds a range of events to encourage people to become community leaders</li> </ul>	<ul style="list-style-type: none"> <li>The Council takes action to encourage people to become councillors particularly from under-represented groups</li> <li>Council provides information on the electoral process</li> <li>The Council builds links with local businesses and employers to promote the role of the councillor</li> </ul>	<ul style="list-style-type: none"> <li>Local democracy week action plan, programme of activities and review</li> <li>Youth council</li> <li>Supports the LGA "Be a Councillor" campaign</li> <li>Citizenship links with local schools, colleges and universities</li> <li>Presentations at community forum events, and targeting under-represented groups, to promote the role of councillors</li> <li>Open days and prospective councillor events</li> <li>Prospective councillor materials, role descriptions – recruitment packs</li> <li>'Day in the life of a councillor' feature in newsletters</li> <li>Top political and managerial leadership can demonstrate that action is taken to encourage people to become councillors, particularly from under-represented groups</li> </ul>



4.2	<p>Councillors are developed so that they can play a full part in the debate /decision making process around increasing organisational effectiveness, providing challenge, leading local communities and places.</p>	<ul style="list-style-type: none"> <li>Development activities are provided to support effective decision-making and service improvement</li> <li>Councillors are developed and supported in their use of the internet and social media to effectively communicate and network with their communities</li> <li>Councillors are developed and supported in their community leadership role e.g. community leadership and engagement, networking, use of social media.</li> </ul>	<ul style="list-style-type: none"> <li>Development activities are offered to support Councillors in identifying appropriate funding streams available to council's wards</li> </ul>	<ul style="list-style-type: none"> <li>Briefings on topical issues around central government policy affecting community empowerment and involvement</li> <li>Councillors understand their roles</li> <li>Councillors understand the impact on their role as community leaders.</li> <li>Training / development in facilitation, brokering, decision-making and influencing skills.</li> <li>PDPs identify what development individual councillors need to enable them to meet the challenge of their changing role and local government environment.</li> <li>Support and development on appropriate and effective use of social media</li> <li>Support and development activities on researching and identifying funding streams</li> </ul>
4.3	<p>The council regularly reviews how it conducts its business, in terms of when meetings are held and full access to meetings, so that councillors or potential councillors are able to take part in the democratic processes</p>	<ul style="list-style-type: none"> <li>Council business is conducted to allow for equality of access in the democratic process</li> <li>The Council diary is scheduled to take account of cultural, faith, travel, domestic and employment commitments</li> </ul>	<ul style="list-style-type: none"> <li>The council gathers feedback on and reviews its arrangements and timings of meetings and the way it conducts its business to take account of cultural, faith, travel, needs and family commitments of councillors</li> </ul>	<ul style="list-style-type: none"> <li>Council Diary</li> <li>Regular reviews of the number of meeting that are necessary to conduct council business, recognising councillors are often involved in external meetings</li> <li>Feedback and examples from Councillors supports an equality of access approach</li> </ul>





## **THE COUNCILLOR DEVELOPMENT CHARTER & CHARTER PLUS**

### **Guidance: Self-Assessment Template**

These templates aim to help councils that sign up to aspire to the principles of the Charter for Councillor Development. They provide guides for self-assessment and for drawing up an action plan to achieve the required award. Councils wanting to use their own action planning format should do so.

Whichever style of action plan is used it should identify:

- future planned action
- when action is expected to be completed
- who is responsible for the action
- who is responsible for monitoring implementation of the action plan

Councils may find it useful to have a team of people responsible for pulling the action plan together, such as the all party councillor development group with officer support. Those responsible for drawing up the action plan should look at each element of the charter framework and the requirements requested and ask:

1. What evidence do we have that suggests we are following good practice?
2. What action do we need to take, if any, to follow good practice or continuously improve? (Taking account of any resource implications and constraints)
3. When will this action be taken by?
4. Who will be responsible for the action?

A named person should be identified as being responsible for monitoring the action plan.

The 'Examples of Evidence' may help in identifying actions to take, however the examples are not set requirements and councils must decide on actions that best fits their particular circumstances.



## Councillor Development Charter: Self-Assessment Template

Criterion 1. There is a clear commitment to councillor development					
	Elements	Requirements for Charter	Evidence	Action	BY WHEN BY WHO
1.1.	Political and managerial leadership is committed to the development of councillors and have strategies in place to improve councillor and council performance.	<ul style="list-style-type: none"> <li>• Clear commitment from the top political and managerial leadership</li> <li>• Established all party training and development task group that meets regularly</li> <li>• There is a clear strategy which is embedded into practice</li> <li>• Named councillor(s) and officer(s) responsible for councillor development</li> </ul>			
1.2	Access to learning and development takes into account diversity of needs: political and managerial leadership can describe specific actions that they have taken to ensure equal access to learning and development opportunities for all councillors.	<ul style="list-style-type: none"> <li>• Timing of events takes account of cultural and personal circumstances</li> <li>• Councillors have fair access and equality of opportunity for development</li> <li>• The development programme includes a range of delivery methods to meet the different learning styles of councillors</li> <li>• Councillors are updated on developments in a range of ways</li> </ul>			
1.3	The council has a designated budget for councillor development which is adequate to meet priority development needs.	<ul style="list-style-type: none"> <li>• Budget is explicit and clearly identified and monitored</li> </ul>			
1.4	Officer/ s of the council have responsibility for co-ordinating councillor development	<ul style="list-style-type: none"> <li>• Appropriate and adequate staffing resources are in place to support councillor development</li> </ul>			



**Criterion 2. The Council has a strategic approach to councillor development**

	<b>Elements</b>	<b>Requirements for Charter</b>	<b>Evidence</b>	<b>Action</b>	<b>BY WHEN</b>	<b>BY WHO</b>
2.1	There is a written and up to date councillor learning and development strategy and Councillor led strategy for councillor induction and development and representative councillors are involved in its formulation, implementation, monitoring and evaluation ( possibly through an established all party task group or other all party committee)	<ul style="list-style-type: none"> <li>Decisions about member development are taken by some form of formally constituted body of councillors</li> <li>Strategy identifies priority development needs and makes stated and clear links with council's aims and objectives</li> <li>Clear induction process and training programme for all new councillors</li> </ul>				
2.2	The council has a structured process for regularly assessing councillors' individual learning and development needs based on focused objectives.	<ul style="list-style-type: none"> <li>A process exists to identify individual development needs in the form of a Training Needs Analysis (TNA) or Personal Development Plans (PDPs) and is working effectively</li> </ul>				
2.3.	The various councillor roles are clearly defined and outline how they contribute to the achievement of community, political and council objectives.	<ul style="list-style-type: none"> <li>Councillors demonstrate an understanding of the skills and knowledge required in their ward and council wide roles</li> <li>Councillor role descriptions exist and are maintained for all key roles including ward councillor</li> <li>Councillors are clear about what the council is trying to achieve and the part they play in this as councillors</li> </ul>				



2.4.	The council has a structured process for assessing current and future leadership and Executive Team development needs	<ul style="list-style-type: none"> <li>Published process to assess current and future needs</li> <li>Joint regular events/development plan that support the top political and management teams in learning about each other and working effectively together.</li> </ul>				
2.5	There is a Corporate Councillor Learning and Development Plan prioritising activities which brings together all learning and development plans – individuals, committees, political leadership and teams. This plan is able to prioritise activities according to resources and links the development of councillors with the Council's aims and objectives	<ul style="list-style-type: none"> <li>Corporate councillor Learning and Development Plan links to council's aims &amp; objectives and the development of Councillors.</li> </ul>				





**Criterion 3. Learning and development is effective in building capacity**

	<b>Elements</b>	<b>Requirements for Charter</b>	<b>Evidence</b>	<b>Action</b>	<b>BY WHEN</b>	<b>BY WHO</b>
3.1	Investment in learning and development is periodically evaluated in terms of cost and benefits of councillor learning and Development and the impact that it has had on performance for the Councillor, the Council and the Community.	<ul style="list-style-type: none"> <li>Evaluation strategy in place to analyse the effectiveness of councillor development activities</li> <li>Case studies of how learning and development has impacted on performance</li> <li>Political and managerial leadership display a good understanding of both the costs and benefits of development activities and are able to explain why their commitment to councillor development is worthwhile</li> <li>Councillors can describe why they did certain activities, what they learnt and what difference it has made to them carrying out their various roles as an elected member</li> </ul>				
3.2	Learning is shared with other councillors and where appropriate, with officers and stakeholders to encourage capacity building in the council and a learning organisation culture.	<ul style="list-style-type: none"> <li>Knowledge is shared with their peers, officers and others</li> </ul>				
3.3	The Council demonstrates a commitment to an effective councillor learning and development programme by implementing improvements to learning and development activities as they are identified.	<ul style="list-style-type: none"> <li>Continuous improvement in the approach to developing people is demonstrated</li> </ul>				



Criterion 4 The council's processes support councillors in their role as leaders of their local communities					
	Elements	Requirements for Charter	Evidence	Action	BY WHEN BY WHO
4.1	The council actively encourages citizenship and publicises the role of councillors as community leaders as part of promoting local democracy and encouraging underrepresented groups to take up office	<ul style="list-style-type: none"> <li>The council holds a range of events to encourage people to become community leaders</li> </ul>			
4.2	Councillors are developed so that they can play a full part in the debate /decision making process around increasing organisational effectiveness, providing challenge, leading local communities and places.	<ul style="list-style-type: none"> <li>Development activities are provided to support effective decision-making and service improvement</li> <li>Councillors are developed and supported in their use of the internet and social media to effectively communicate and network with their communities</li> <li>Councillors are developed and supported in their community leadership role e.g. community leadership and engagement; networking; use of social media.</li> </ul>			
4.3	The council regularly reviews how it conducts its business, in terms of when meetings are held and full access to meetings, so that councillors or potential councillors are able to take part in the democratic processes	<ul style="list-style-type: none"> <li>Council business is conducted to allow for equality of access in the democratic process</li> <li>The Council diary is scheduled to take account of cultural, faith, travel, domestic and employment commitments</li> </ul>			



## Councillor development Charter Plus: Self-Assessment Template

Criterion 1. There is a clear commitment to councillor development						
	Elements	Requirements for Charter Plus	Evidence	Action	BY WHEN	BY WHO
1.1.	Political and managerial leadership is committed to the development of councillors and have strategies in place to improve councillor and council performance.	<ul style="list-style-type: none"><li>• Clear commitment from top political and managerial leadership to share development opportunities across local government tiers (including with parish &amp; town councils)</li><li>• Evidence that the Strategy is regularly reviewed</li><li>• Evidence of forward planning</li></ul>				
1.2	Access to learning and development takes into account diversity of needs: political and managerial leadership can describe specific actions that they have taken to ensure equal access to learning and development opportunities for all councillors.	<ul style="list-style-type: none"><li>• Statistical analysis of cultural &amp; personal circumstances</li></ul>				
1.3	The council has a designated budget for councillor development which is adequate to meet priority development needs.	<ul style="list-style-type: none"><li>• The budget is properly reviewed, set and prioritised by the cross party task group</li></ul>				
1.4	Officer/ s of the council have responsibility for co-ordinating councillor development	<ul style="list-style-type: none"><li>• Member development and support staff have their own skills development programme</li><li>• Member development and support staff are involved in regional and national learning networks</li></ul>				



Criterion 2. The Council has a strategic approach to councillor development					
	Elements	Requirements for Charter Plus	Evidence	Action	BY WHEN BY WHO
2.1	There is a written and up to date councillor learning and development strategy and Councillor led strategy for councillor induction and development and representative councillors are involved in its formulation, implementation, monitoring and evaluation (possibly through an established all party task group or other all party committee)	<ul style="list-style-type: none"> <li>Evaluation feedback contributes to review and further development of the strategy</li> </ul>			
2.2	The council has a structured process for regularly assessing councillors' individual learning and development needs based on focused objectives.	<ul style="list-style-type: none"> <li>All councillors are offered PDPs and more than half of councillors take them up.</li> <li>Council has a process for diagnostic reviews (e.g. 360 degree reviews or appraisal process) to reflect on strengths and to support progression.</li> </ul>			
2.3.	The various councillor roles are clearly defined and outline how they contribute to the achievement of community, political and council objectives.	<ul style="list-style-type: none"> <li>Role descriptions are used to help identify development needs</li> <li>Evidence that councillors are clear about               <ul style="list-style-type: none"> <li>The role of partner bodies</li> <li>The role of other stakeholders</li> <li>Their own role on partner bodies</li> <li>Their own role in relation to other stakeholder bodies</li> </ul> </li> </ul>			



2.4.	The council has a structured process for assessing current and future leadership and Executive Team development needs	<ul style="list-style-type: none"> <li>Portfolio holders and spokespersons have undertaken training appropriate to their portfolio area.</li> <li>Evidence of a programme to develop the next generation of leaders</li> </ul>				
2.5	There is a Corporate Councillor Learning and Development Plan prioritising activities which brings together all learning and development plans – individuals, committees, political leadership and teams. This plan is able to prioritise activities according to resources and links the development of councillors with the Council's aims and objectives	<ul style="list-style-type: none"> <li>The councillor development plan clearly prioritises learning activities in accordance with the needs of the corporate aims and objectives</li> </ul>				



Criterion 3: Learning and development is effective in building capacity						
	Elements	Requirements for Charter Plus	Evidence	Action	BY WHEN	BY WHO
3.1	Investment in learning and development is periodically evaluated in terms of cost and benefits of councillor learning and Development and the impact that it has had on performance for the Councillor, the Council and the Community.	<ul style="list-style-type: none"> <li>Analysis of costs and benefits from councillor training and development at</li> <li>Some form of impact assessment at the community level exists and is used (e.g. by asking for feedback from partners)</li> </ul>				
3.2	Learning is shared with other councillors and where appropriate, with officers and stakeholders to encourage capacity building in the council and a learning organisation culture.	<ul style="list-style-type: none"> <li>There is an effective process for disseminating, sharing and exchanging knowledge in place</li> </ul>				
3.3	The Council demonstrates a commitment to an effective councillor learning and development programme by implementing improvements to learning and development activities as they are identified.	<ul style="list-style-type: none"> <li>Links to Evaluation Strategy – what does?</li> <li>Demonstrate that evaluation outcomes inform change and drive continuous improvement</li> <li>A quality assurance process is in place</li> </ul>				



**Criterion 4 The council's processes support councillors in their role as leaders of their local communities.**

	<b>Elements</b>	<b>Requirements for Charter Plus</b>	<b>Evidence</b>	<b>Action</b>	<b>BY WHEN</b>	<b>BY WHO</b>
<b>4.1</b>	<b>The council actively encourages citizenship and publicises the role of councillors as community leaders as part of promoting local democracy and encouraging under represented groups to take up office</b>	<ul style="list-style-type: none"> <li>The Council takes action to encourage people to become councillors, particularly from under-represented groups</li> <li>Council provides information on the electoral process</li> <li>The Council builds links with local businesses and employers to promote the role of the councillor</li> </ul>				
<b>4.2</b>	<b>Councillors are developed so that they can play a full part in the debate /decision making process around increasing organisational effectiveness, providing challenge, leading local communities and places.</b>	<ul style="list-style-type: none"> <li>Development activities are offered to support Councillors in identifying appropriate funding streams available to councils/wards</li> </ul>				
<b>4.3</b>	<b>The council regularly reviews how it conducts its business, in terms of when meetings are held and full access to meetings, so that councillors or potential councillors are able to take part in the democratic processes</b>	<ul style="list-style-type: none"> <li>The council gathers feedback on and reviews its arrangements and timings of meetings and the way it conducts its business to take account of cultural, faith, travel needs and family commitments of councillors</li> </ul>				



