



## Notice of meeting of

### **Member Development Steering Group**

**To:** Councillors Runciman (Chair), D'Agorne, Gunnell and Wiseman

**Date:** Wednesday, 24 November 2010

**Time:** 4.00 pm

**Venue:** The Guildhall, York.

## **A G E N D A**

### **1. Declarations of Interest**

At this point in the meeting, members are invited to declare any personal or prejudicial interests they may have in the business on the Agenda.

### **2. Minutes** (Pages 3 - 6)

Members are asked to approve the minutes of the last meeting of the Steering Group held on 15 September 2010.

### **3. Public Participation**

It is at this point in the meeting that Members of the Public who have registered their wish to speak can do so. The deadline for registering is **5pm on Tuesday 23<sup>rd</sup> November 2010.**

**4. First Monitor of Member Training & Development** (Pages 7 - 16)

This report informs Members of the take up to date of Member Training & Development events offered in the first half of 2010/11 together with a summary of feedback received.

**5. Annual Review of Member Training & Development Policy.** (Pages 17 - 38)

This report asks members to consider any revisions they wish to make to the current Member Training & Development Policy.

**6. Charter for Member Development Assessment Report.** (Pages 39 - 60)

This report puts before members the charter assessment panel's report setting out in detail their findings following City of York's successful bid for Charter Status.

**7. Ageing Well Programme of Development Support for York Members.** (Pages 61 - 82)

This report outlines a proposal from Local Government Improvement & Development to provide elected members with a range of development support in order to meet the challenges of York's ageing population.

Democracy Officer

Laura Bootland  
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Email: [laura.bootland@york.gov.uk](mailto:laura.bootland@york.gov.uk)

For more information about any of the following please contact the Democracy Officer responsible for servicing this meeting Laura Bootland Democracy Officer

- Registering to speak
- Business of the meeting

- Any special arrangements
- Copies of reports

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## About City of York Council Meetings

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- register by contacting the Democracy Officer (whose name and contact details can be found on the agenda for the meeting) **no later than 5.00 pm** on the last working day before the meeting;
- ensure that what you want to say speak relates to an item of business on the agenda or an issue which the committee has power to consider (speak to the Democracy Officer for advice on this);
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### Further information about what's being discussed at this meeting

All the reports which Members will be considering are available for viewing online on the Council's website. Alternatively, copies of individual reports or the full agenda are available from Democratic Services. Contact the Democracy Officer whose name and contact details are given on the agenda for the meeting. **Please note a small charge may be made for full copies of the agenda requested to cover administration costs.**

### Access Arrangements

We will make every effort to make the meeting accessible to you. The meeting will usually be held in a wheelchair accessible venue with an induction hearing loop. We can provide the agenda or reports in large print, electronically (computer disk or by email), in Braille or on audio tape. Some formats will take longer than others so please give as much notice as possible (at least 48 hours for Braille or audio tape).

If you have any further access requirements such as parking close-by or a sign language interpreter then please let us know. Contact the Democracy Officer whose name and contact details are given on the order of business for the meeting.

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### **Holding the Executive to Account**

The majority of councillors are not appointed to the Executive (40 out of 47). Any 3 non-Executive councillors can 'call-in' an item of business from a published Executive (or Executive Member Decision Session) agenda. The Executive will still discuss the 'called in' business on the published date and will set out its views for consideration by a specially convened Scrutiny Management Committee (SMC). That SMC meeting will then make its recommendations to the next scheduled Executive meeting in the following week, where a final decision on the 'called-in' business will be made.

### **Scrutiny Committees**

The purpose of all scrutiny and ad-hoc scrutiny committees appointed by the Council is to:

- Monitor the performance and effectiveness of services;
- Review existing policies and assist in the development of new ones, as necessary; and
- Monitor best value continuous service improvement plans

### **Who Gets Agenda and Reports for our Meetings?**

- Councillors get copies of all agenda and reports for the committees to which they are appointed by the Council;
- Relevant Council Officers get copies of relevant agenda and reports for the committees which they report to;
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City of York Council

Committee Minutes

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MEETING	MEMBER DEVELOPMENT STEERING GROUP
DATE	15 SEPTEMBER 2010
PRESENT	COUNCILLORS RUNCIMAN (CHAIR), D'AGORNE, GUNNELL AND WISEMAN

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**41. DECLARATIONS OF INTEREST**

Members were invited to declare at this point in the meeting any personal or prejudicial interests they might have in the business on the agenda. None were declared.

**42. MINUTES**

RESOLVED: That the minutes of the meeting held on 19 May 2010 be approved and signed by the Chair as a correct record.

**43. PUBLIC PARTICIPATION**

It was reported that there had been no registrations to speak at the meeting under the Council's Public Participation Scheme.

**44. DRAFT INDUCTION STRATEGY 2011.**

Members considered a report which put before them draft arrangements for inducting newly elected Members immediately after the forthcoming elections in May 2011 in accordance with the key strategic elements of the Council's Member Training and Development Policy.

Officers outlined the report and advised that the Induction Strategy is the final item being prepared to go towards the assessment for Charter Status and would also be useful due to the impending 2011 Local Elections.

Members made the following comments:

- Personal Development Plans should be highlighted to new Members early.
- A separate session on the decision making process and scrutiny would be useful.
- Importance of Planning training for new Members.
- Possibility of a 'Drop In' induction or workshop on IT so new Members can call in to ask questions.

- Ensure that new Members are introduced thoroughly to casework and how to log complaints and enquiries from residents in their Ward.

RESOLVED: That support be given to the proposed strategy for induction of newly elected Members as set out in Annex B.

REASON: In order to comply with the requirement of the Charter and to provide newly elected Members with appropriate skills, knowledge and experience to carry out their roles.

#### **45. INTRODUCTION OF EXIT SURVEYS/INTERVIEWS FOR ELECTED MEMBERS.**

Members were presented with a report which asked them to consider a suggested draft exit survey for Members standing down from Council.

Officers introduced the report and advised that Exit Surveys are good practice and a way for the Member Support Officer to obtain information about the experiences of Members.

Members made the following comments:

- Surveys should be anonymous as far as possible.
- Ask for years of service rather than specific dates.
- Option to discuss any issues further with the Member Support Officer if required.
- Section 2 regarding employment should have more space to enable expansion of answers as employment status is often key to why individuals stand to be a Councillor or not.
- General tidy up of the layout of the survey is required.
- Addition of a question to discover if the individual stood down or was not re-elected.
- A question to find out what roles the individual had e.g. Exec Member, Chair of a Committee.
- Possible addition of questions on time constraints and work/life balance.

RESOLVED: That support be given to proposed exit survey as set out in Annex A for future use in connection with future retiring members.

REASON: In order to support the improvement of communication, relationships, support, training and ultimately the retention of elected members.



**46. LOCAL DEMOCRACY WEEK.**

Members considered a report which summarised the events and activities planned during Local Democracy Week between 12 and 15 October 2010, in support of raising awareness about the democratic process and the role of Councillors.

Officers advised Members that the following events had been arranged:

- Meet the Mayor.
- Schools Council Meeting
- A Councillor, Who Me?
- Tours of the Guildhall – ‘Corridors of Power’
- Mansion House Tours.

Members noted the events.

RESOLVED: That the programme of activities for Local Democracy Week, initiated by Democratic Services, in furtherance of the commitment to achieve Member Development Charter Status.

REASON: In order to comply with the requirements of the former I&DeA Charter and to actively raise awareness about the democratic process.

**47. VERBAL UPDATE ON THE CHARTER ASSESSMENT.**

Members received a verbal update from officers on the arrangements in place for the Charter Assessment later in the month.

Officers advised that the Charter Status assessment was scheduled for the 28<sup>th</sup> September and that an information pack would be sent out to Members being assessed. In response to Members questions, Officers advised that only two member Personal Development Reviews were outstanding.

RESOLVED: That the update on the Charter Assessment be noted.

REASON: In order to keep Members up to date with work which has been undertaken towards the Charter Assessment.

Councillor Runciman, Chair  
[The meeting started at 3.30 pm and finished at 4.30 pm].

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Member Development Steering Group

24 November 2010

Report of the Assistant Director Legal, Governance & ITT

## **First Monitor of Member Training and Development**

### **Summary**

1. This report informs members of the take up to date at events offered in the first half of 2010/2011 together with a summary of feedback received.

### **Background**

2. The Council has put in place effective systems for recording the data it holds in respect of development activities offered to members and this Steering Group has undertaken to monitor both take-up and feedback bi-annually.

### **Monitoring of Take-Up of Training & Development**

3. In January of 2009 Council introduced an annual minimum requirement relating to the number of development activities Executive/Non Executive members should attend. Council agreed that Executive members should attend a minimum of 12 development sessions and Non-Executive Members a minimum of 8 sessions during the course of a year;
4. Details of Members' attendance levels at all events offered and activities undertaken in the first half of 2010/2011, as covered under the Councils' agreed standards, are set out in Annex A to this report;

#### **Analysing Take-Up**

5. The take up figures shown in Annex A reflect member engagement with a wide spectrum of development opportunities including events offered in the core programme, external seminars, topical briefings and in addition training offered by partner organisations such as the Police and Fire Authorities. Members are encouraged to notify Member Support of any qualifying events they have attended throughout the year which will impact on their personal targets.

6. Annex A shows that:

- 5 Non Exec Members have achieved the minimum target of 8 qualifying 'sessions' to date and 4 of those have exceeded the target
- 3 Executive Members have achieved the minimum target of 12 qualifying 'sessions' to date
- All Executive Members have undertaken at least 2 qualifying events or activities to date;
- 7 Non-Executive Members have yet to undertake any qualifying events or activities so far this year;

7. In accordance with the Steering Groups role, Members may wish to consider how they will encourage Members within their Groups who have not attended any qualifying events or activities to take advantage of the remaining sessions on offer between now and May 2011.

### **Evaluating the Core Programme (including in year additions)**

8. In addition to the monitoring of take up at development events another key aspect to measuring the success and effectiveness of the development sessions on offer is measured through feedback received from attendees.
9. Details of feedback received between June and November relating to development activities included in the core programme are summarised in Annex B.
10. It should be noted that a number of sessions which would have been included in this evaluation report were recently pulled from the core programme to allow time to review recent changes arising from shifts in Government policy. Therefore, sessions such as Ethical Decision Making, Transformational Change, the Legislative Agenda and 'Total Place' will be reviewed and refreshed once the national position on some of these initiatives becomes clearer.

### **Summary of Feedback**

11. The Supercharged Debates session delivered by Emma Taylor 'successful speeches' was included in the programme following individual requests coming out of the PDR process for increased skills during debate both within the group and at full council. As a successful writer for television, Emma Taylor has a unique and engaging style of delivery which members appear to warm to. Feedback from all members who engaged in the training was extremely positive particularly with regard to the standard of training and the general level of interaction which was achieved with the

participants. Some members commented they would be interested in more training using this particular provider.

12. In September and October York hosted two regionally funded sessions on behalf of Local Government Yorkshire and Humber. Both sessions were of excellent quality giving our own members a valuable opportunity to network and learn with officers and members from across the region. The first, an interactive workshop entitled Govern-it was a virtual reality game where officers and members divided into teams to solve complex challenges facing a virtual authority. The innovative virtual reality style was a real hit with members and officers who attended the session. The training provider Pixel Fountain have a range of 8 similar sessions to offer which members may wish to explore when planning the core programme.
13. The second regionally funded event took place in November and focused on the spending review. Of the 23 delegates from across the region 9 were from York. Much credit was given to the specialist knowledge and delivery style shown by the trainer Ian Fifield from Local Government futures. Feedback reported an extremely worthwhile session which equipped members and officers with the necessary knowledge and practical skills to contribute to, and evaluate the results of, their authority's approach to savings identification.
14. Other sessions such as 'Making a difference in Scrutiny' and the 'Budget Overview' session were well received, however turnout at these two sessions was particularly disappointing. The Scrutiny session had only 5 members in attendance and those who attended commented on "an excellent session but not enough members present" another member commented "All scrutiny members should have this training". The Budget Overview Session also had just 5 attendees however feedback received showed it was short and to the point and aimed at the right level.

## **Options**

15. (a) To refer the findings of this report to Standards Committee as part of the ongoing commitment under the existing member development policy to evaluate the success of the programme.
- (b) To suggest any amendments prior to referral of the report to Standards Committee

## **Corporate Priorities**

16. Monitoring take up of development events and evaluating the core programme directly supports the Council's Corporate aim of providing of strong leadership, supporting and developing people and encouraging improvement in everything we do.

### Implications

17. There are no known financial, HR, legal or other implications associated with the contents of this report.

### Risk Management

18. In compliance with the Council's risk management strategy, there are no risks associated with the contents of this report other than if the Steering Group were not to refer the report to Standards Committee, thus being in breach of the Terms of Reference for the Steering Group agreed by Full Council

### Recommendation

19. Members are asked to comment on the contents of the report and to refer them to Standards Committee for consideration as set out in para 17 above.

### Reason

20. In order to comply with the monitoring arrangements set out in the Steering Group's Terms of Reference as approved by Council.

### Contact Details

**Author:**

Amanda Oxley  
Senior Member Support Officer

**Chief Officer Responsible for the report:**

Andrew Docherty  
Assistant Director Legal, Governance & ITT

Dawn Steel  
Democratic Services Manager

Report Approved  Date 17/11/10

### Specialist Implications Officer(s)

Wards Affected:

All

For further information please contact the author of the report

### Background Papers:

None.

### Annexes:

Annex A –Attendance Levels Monitor  
Annex B – Summary of Evaluation of Core Programme events

## Training and Development A

11/27 May 2010 – 17 Nov 2010

Figures marked with \* mean that particular member has exceeded the target by the number shown

COUNCILLOR	Annual Target	Year to date	May 2011 Target
ALEXANDER	8	5	3
ASPDEN	8	3	5
AYRE	12	4	8
BOYCE	8	2	6
BOWGETT	8	1	7
BROOKS	8	5	3
CREGAN	8	0	8
CRISP	8	6	2
D'AGORNE	8	3	5
DOUGLAS	8	2	6
FIRTH	8	4	4
FRASER	8	2	6
FUNNELL	8	3	5
GALLOWAY S	8	1	7
GALLOWAY S F	12	2	10
GALVIN	8	10	0
GILLIES	8	11	0
GUNNELL	8	9	0
HEALEY	8	5	3
HOBAN	8	1	7
HOGG	8	0	8
HOLVEY	8	0	8
HORTON	8	5	3
HUDSON	8	3	5
HYMAN	8	7	1
JAMIESON-BALL	8	0	8
KING	8	1	7
KIRK	8	0	8
LOOKER	8	4	4
MERRETT	8	6	2
MOORE	12	13	0
MORLEY	12	14	0
ORRELL	8	3	5
POTTER	8	8	0
REID	12	5	6
RUNCIMAN	12	8	4
SCOTT	8	0	8
SIMPSON-LAING	8	5	3
SUNDERLAND	8	1	7
TAYLOR	8	6	2
VASSIE	8	1	7
WALLER	12	11	1
WATSON B	8	6	2
WATSON R	8	0	8
WATT	8	6	2
WAUDBY	8	2	6
WISEMAN	8	9	0

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Evaluation of Member Training from June 2010 - November 10

Annex B

	Not Stated or Not Applicable	Unsatisfactory	Poor	Satisfactory	Good	Excellent
How well did the course meet your objectives					48	52
Was training aimed at the right level			4	4	37	55
Rate the style and delivery of the session				8	37	55
Rate the quality and content of handouts	18		4	12	48	18
How much did your knowledge increase		4		12	32	52
Sufficiency of breaks	22			12	25	41
General organisation			4	4	48	44
Did the session support the Council's strategic aims and objections	19				50	31

	Not Stated	Effective Organisation	All			
Which of the Council's Strategic Aims and Objections did attendees this session supported.	9	63	28			

**General Comments:**

**Making a difference through Overview & Scrutiny:**

Comfortable Venue

I know what Scrutiny should be and am absolutely positive that we are not achieving what we should be because we have it wrong in York.

All scrutiny Committee Members should have to have this training.

Excellent, not enough Members present

Just right time, enthusiastic delivery

A really helpful session which is illustrated where the barriers are to good scrutiny and what to do about them

Pity we ran out of time could have allowed for more discussion

**Supercharged Debates**

Excellent Presenter

Good, would like further training

Very good

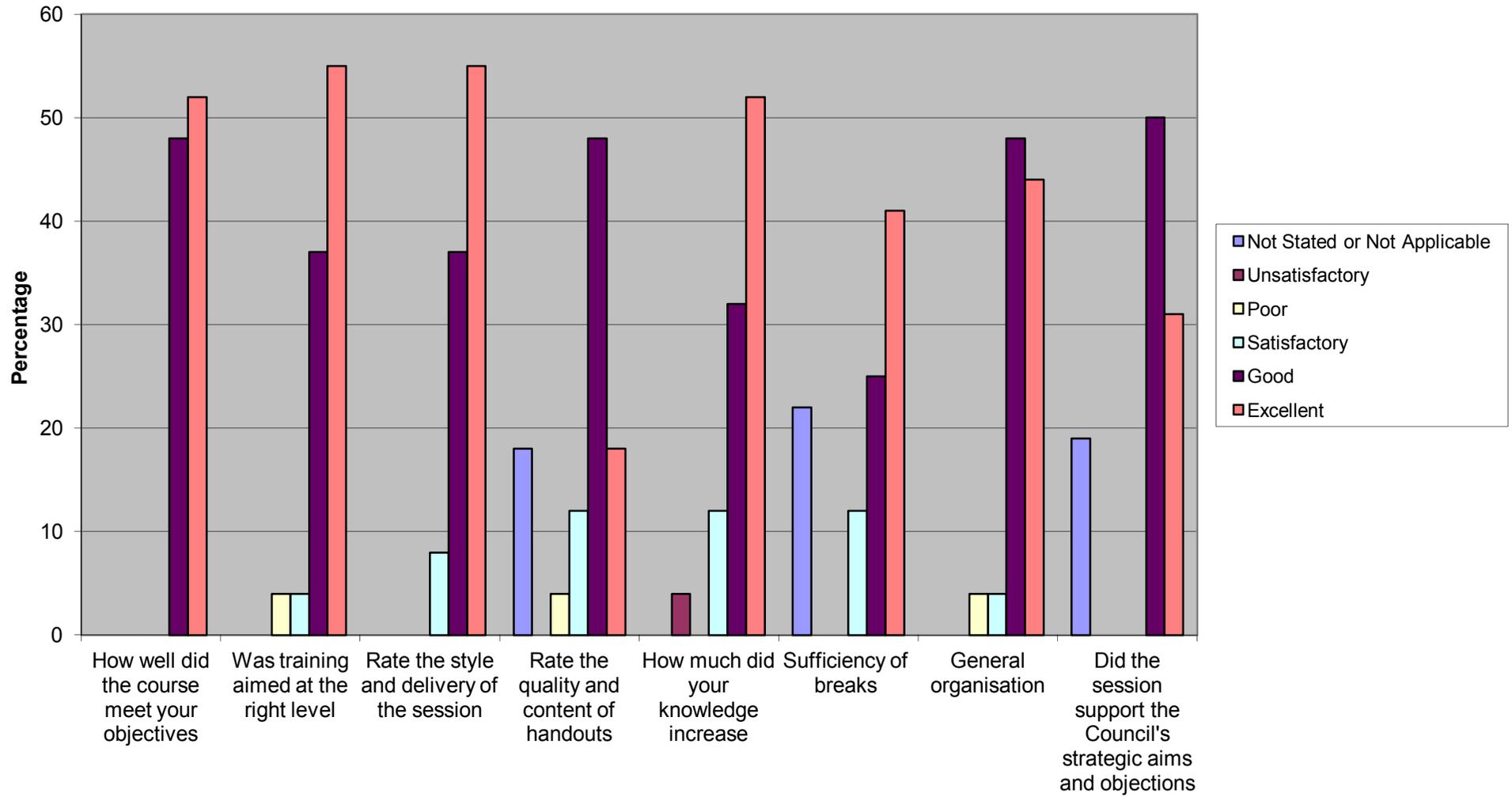
Very enjoyable

Good interaction and correct time spent

Excellent

Very good

### Evaluation of Member Training from June 2010-November 2010



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## **Member Development Steering Group**

**24 November 2010**

Report of the Assistant Director Legal, Governance and ITT

## **Annual Review of Member Training & Development Policy**

### **Summary**

1. This report asks members to consider any revisions they wish to make to the current Member Training & Development Policy.

### **Background**

1. In October 2009 Steering Group Members approved the introduction of a Member Training & Development Policy outlining the structured approach the Council takes to developing its elected Members.
2. Establishing a Member Development Policy was a key contributor in the Council's successful bid to gain charter status and good practice states that in order to remain fit for purpose the policy should be reviewed annually.
3. The Charter for Member Development assessment report is the subject of another report on this agenda, however much credit was given in the report to York's comprehensive Member Training & Development Policy and its easy read format.

### **Member Training and Development Policy 2010/2011**

4. Attached at Annex A is the current Member Training & Development Policy, which has now been in place for 12 months.
5. When refreshing the policy Members may wish to address some of the comments raised in the charter assessment report, in particular the following areas:
  - Budget Support p.10
  - Arrangements for Monitoring & Evaluation in light of the anticipated abolition of Standards regime p.13 (an update on how this may affect the reporting lines of this Steering Group will be given at the meeting)
  - Protocol for Councillor attendance at conferences & external training & development events including any additions to the annual list of conferences p.14/15

## Consultation

6. Details of the current Policy have been circulated to the Council's Management Team for comment and any suggestions resulting from the consultation will be reported at the meeting.

## Options

7. (a) To endorse the Policy as it correctly stands or  
(b) to endorse the Policy in line with feedback from the Charter Assessment and any other relevant comments received.

## Corporate Priorities

8. The provision of a Member Development Policy is consistent with the priority actions included in the Council's refreshed Corporate Strategy. In particular the provision of strong leadership, supporting and developing people and encouraging improvement in everything we do.

## Implications

9. The following implications have been considered:
  - **Financial** – Any financial costs associated with the Member Development Policy will be met from the existing Member Development budget managed and monitored by the Senior Member Support Officer.
  - **Human Resources (HR)** – Any HR issues arising from the policy relate to trainers & staff support for member development
  - **Equalities** – The policy addresses equality and diversity issues on a number of levels from the provision of a range of accessible training options to supporting individual members with specific needs.
  - **Legal** – There are no Legal implications associated with this report.
  - **Crime and Disorder** – There are no crime and disorder implications associated with this report.
  - **Information Technology (IT)** – Any IT implications associated with this report relate to the provision of ITT equipment, ITT training and ITT support currently available to members
  - **Property** – There are no property implications associated with this report
  - **Other** – There are not other implications associated with this report.

## Risk Management

10.If members fail to revise the policy, there is a risk that the policy will not reflect current training needs or provision.

**Recommendation**

11.It is recommended the Member Development Steering Group refresh the Member Training and Development Policy along the lines reported

**Contact Details**

**Author:**

Amanda Oxley  
Senior member Support Officer

**Chief Officer Responsible for the report:**

Andrew Docherty  
Assistant Director Legal, Governance and ITT

Dawn Steel  
Democratic Services Manager

Report Approved

Date 17/11/11

**Specialist Implications Officer(s)**

Wards Affected:

All

For further information please contact the author of the report

**Background Papers:**

None.

**Annexes:**

Annex A –Member Training & Development Policy 2009/2010

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This policy can also be provided in different formats e.g. Braille, audio tape or large print by contacting Member Services on Tel No.01904 552054



# Member Training & Development Policy



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## Member Development Policy Statement - A Commitment

The Member Development Steering Group (MDSG) has overseen the development of a policy aimed at promoting training and development opportunities for York's members. For the purposes of this policy the term 'members' applies to the Authority's elected members along with any independent and co-opted members of Council bodies.

The Steering Group is committed to ensuring the Council has well trained Members to:

- become effective Community Leaders;
- fulfil their varying roles;
- further the Council's values and priorities set out in its Corporate Strategy, including improving the Council's organisational effectiveness; and
- play their part in achieving a shared vision for York.

Underpinning this commitment, the Group has developed a policy based upon the following principles of the joint Local Government Yorkshire & Humber/Improvement & Development Agency (ID&eA) Charter.

- developing elected members as effective community leaders
- adopting a member lead strategic approach to member development
- having a member learning and development plan in place that clearly identifies the difference development activities can make
- ensuring that learning and development is effective in building capacity
- addressing wider development matters to promote work-life balance and citizenship

To succeed in its ambitions, the Group is committed to ensuring:

- All members and co-opted members have equality of access to an annual core programme of training and development activities providing the skills and knowledge required to be effective both in their communities and their varying roles
- A planned and structured approach to training and development allowing equal access to development activities and maximising engagement at all levels
- Members take responsibility for their own development needs and fully participate in training and development activities
- Information on training and development activities is communicated in such a way as to give sufficient notice to attend
- Adequate provision of resources for training and development opportunities to include a dedicated officer (Senior Member Support Officer) as first point of contact for all Member Training and Development matters
- all Members are offered an annual Personal Development Review with the aim of identifying and prioritising current training and development needs
- Where appropriate, shared training for members, senior officers and partners both within and across authorities is explored, to foster healthy working relationships and to make best use of resources
- There are no physical, social, religious or cultural barriers to Members participating in training and development activities
- Evaluation and feedback relating to development activities are effectively monitored and reviewed so that future provision of training and development remains relevant

and to a high standard

The delivery of our ambitions and commitment to developing Members to their full potential is set out in the Council's Member Training & Development Policy, which we will review annually.



Councillor Carol Runciman  
**Chair of Member Development  
Steering Group**



Councillor Sian Wiseman  
**Member Development  
Steering Group**



Councillor Julie Gunnell  
**Member Development Steering Group**

## Member Training & Development Policy

### Introduction

It is vital that members on the Council are supported in all their diverse roles on the Council and this policy sets out the Council's commitment to providing a consistent and structured approach towards developing and supporting members in:

- Carrying out their existing roles efficiently, including effective community leadership;
- Preparing for future roles on an individual basis;
- Undertaking their specific duties and responsibilities;
- Contributing to improving the effective organisation of the Council;
- Keeping up to date with new legislation and changing policies

To demonstrate its commitment in recognising the potential and value of a well trained organisation, the Council has signed up to achieving Local Government Yorkshire & Humber/ I&DeA Member Development Charter status, pledging to adopt nationally recognised good practice guidelines .

### Being Corporate

City of York Council's revised Corporate Strategy sets out the Council's new strategic priorities for the period 2009/2012. As well as demonstrating to the city as a whole the work we are doing for our communities, it also gives all teams in the council, however different in their day to day work, a shared purpose.

The Corporate Strategy has eight themes:

- Thriving City – supporting York's successful economy
- Sustainable City – focussing on reducing our impact on the environment
- Safer City – reducing crime rates
- Learning City – providing local people with the opportunities to develop their skills and aspirations
- Inclusive City – making sure all citizens regardless of race, age, disability, sexual orientation, faith or gender feel included in the life of York
- City of Culture – inspiring residents and visitors to explore their creative talents
- Healthy City – providing healthier lifestyle choices and responsive health and social care provision
- Effective Organisation – Improving further its organisational standards to become a modern council and a great place to work

The Council recognises that one of the many factors in achieving its shared vision for the City in the provision of good quality training and development opportunities for both officers and members and these are identified as key areas for improvement in the Council's single improvement plan.

## A Councillor's Role

Once elected a councillor (elected Member) must represent the best interests of their residents, the Council and the City working in partnership. In performing their duties, a councillor will have the following roles:

- Representing the local interests of the community they are elected to serve (ward councillor)
- Setting and developing council policies
- Helping to shape and advise upon the policies of others (partners with whom the Council works)
- Scrutinise and investigate the Council's work and activities and the work and activities of others (statutory partners)
- Promoting and maintaining high standards of behaviour across the Council and its parishes
- Consider and determine applications for planning and licensing consents and related issues

In addition to their roles as community representatives councillors may be appointed to:

- The Executive
- Scrutiny
- Planning
- Standards or governance committees
- Outside Bodies
- Local Strategic Partnerships (LSP) Boards
- Ward Committees

## Aims of the Policy

This policy is built around supporting all councillors in their particular roles, taking account of their diverse needs. It aims to:

- To ensure that support is available enabling individuals to acquire and develop a full range of skills to maximise their ability and capacity to deliver
- To encourage councillors to take responsibility for their continuing professional development whilst reinforcing that they are key to enabling the Council to achieve its aims and objectives
- To clearly define corporate responsibilities for officers in relation to member training and development, including a named officer with a co-ordinating role
- To identify adequate resources to meet the objectives of the learning and development programme

In fulfilling these aims we will observe the following **key principles**:

- provide a planned approach to Member Development
- involve Councillors in their learning and development, from planning the learning programme through to delivery and evaluation
- maximise development opportunities for Councillors through partnership with other organisations and neighbouring authorities
- ensure that the contribution that member learning and development makes to meeting the Council's aims is evaluated and recognised

- support individual learning and development valuing and recognising the skills and experiences that councillors bring with them
- identify individual development needs through a focussed approach to personal development
- adopt a Member Development Programme with clear objectives and links to the aims of the Council, the roles and functions of members and the key changes affecting the Council's priorities
- deliver training and development in innovative ways to make the best use of the resources available to the Council;
- ensure that every member takes responsibility for their own learning and self development
- be flexible about the delivery of training and development, taking into account the diverse needs of individual councillors
- encourage and support mentoring both within party groups 'buddying' and by use of I&DeA peer mentors
- support members with caring responsibilities

## Support & Resources

The following will assist in delivering the aims and key principles of the Member Training & Development Strategy

### The Member Development Steering Group (MDSG)

The MDSG is made up of representatives from all parties who will oversee all Councillor training and development on behalf of the Council and will lead on the development of relevant strategies, policies and programmes for councillors.

Each member of the MDSG will act as an ambassador for training and development and positively support and encourage other Councillors to identify training needs and take advantage of development opportunities.

In particular the MDSG will:

- Ensure that a comprehensive induction programme in all appropriate Council functions and services is made available to all newly elected Councillors
- Ensure that all Councillors are encouraged to take part in a Personal Development Review (PDR) on an annual basis
- Ensure that an annual programme of development opportunities is provided meeting the identified needs through the PDR process and that delivery reflects individual learning style preferences
- Facilitate new approaches to learning and development and to encourage a culture of lifelong learning
- Review the Member Development Policy annually to ensure that it remains fit for purpose and continues to support the Council's aims and the needs of Members
- Encourage the Council and all councillors to actively promote citizenship
- Encourage the Council to promote community leadership and Councillors to develop their roles as community leaders



## Member to Member Support

Members will be encouraged to share their knowledge and expertise with fellow members, where appropriate, by:

- leading workshops
- supporting newly elected members (buddying)
- speaking at external conferences & seminars in their capacity as an elected member
- considering the opportunity to become an accredited peer with the ID&eA which involves mentoring elected members from outside the authority and being involved in the delivery ID&eA seminars and conferences

All of the above activities and opportunities can be explored through the personal development planning process. The benefits of engaging in such activities are considerable for those involved and are a valuable addition to Members' individual training profiles.

## Officer Support

Democratic Services will support training and development by:

- Providing the main support officer for all Councillor training and development, who is the Senior Member Support Officer, and ensuring that all members are clearly aware of training and development opportunities in good time;
- Providing officer support in relation to the preparation of agenda and minutes relating to meetings of the MDSG
- Providing 1-2-1 support to newly elected members as part of their planned induction programme
- Devising and delivering in consultation with the MDSG a programme of induction training for new Councillors
- Devising and delivering, in consultation with the MDSG, a comprehensive annual training and development programme for all Councillors based on the needs identified through PDRs and other essential training;
- Provide administrative support for all training and including communication with Members and provision of feedback to providers;
- Managing the member training budget in consultation with the Member Development Steering Group;
- Advising and assisting the MDSG in carrying out their role

## Budget

The Council allocates a Member Development Budget each year against which the MDSG monitors spending. In addition, from time to time regional funding is made available for specific areas of training and development, e.g. IT, mentoring etc. Where appropriate training and development opportunities will be opened up to neighbouring Council's at a nominal charge to help maximise resources.

Expenses incurred by Members attending training and development events will be reimbursed under the Members Scheme of Allowances and in accordance with an agreed protocol.

## ITT Resources and Support

ITT equipment: is made available to each member upon election to enable:

- More effective communication with residents, the Council and it's partners
- The opportunity to explore e-learning/distance learning
- Self development opportunities e.g. researching information on the internet

Broadband Connections: are either paid on behalf of Members or reimbursed on a monthly basis depending on the broadband package.

ITT support: is made available via the Council's ITT helpdesk including out of hours assistance. Members also have access to the ITT on-line help facility.

## Delivery Of Training & Development

Elected and co-opted Members have a diverse range of development needs and learning preferences which will be delivered through a range of options to both provide and promote that diversity. Whether delivered through the Council's internal expertise or through specialist external training providers, access to training will be offered as follows:

- Core programme courses
- Written learning materials
- E-Learning packages
- Shadowing opportunities
- External conferences & seminars
- Peer mentors, political group/officer buddying
- Pre-Council Briefings, in-house briefings & workshops

- Study visits to other Councils or relevant partners
- Targeted training for newly elected Members
- Leadership development opportunities
- Sharing knowledge with other elected & co-opted Members

## **Promoting the Dissemination of Learning**

Promoting the Dissemination of Learning is a requirement of the I&DeA Member Development Charter. Attendance at external events is a valuable way of acquiring information about a wide range of issues including new and innovative practice, new legislation, and other regional and national developments.

It will therefore be expected that, wherever appropriate, Members who attend external events will lodge with the Members' Library any course information, handouts, etc. In addition, any Member attending external events must be prepared to provide a short written report as a minimum requirement, and where appropriate to provide briefing sessions to other Members in order to pass on information or learning that has been acquired.

## **Communicating and Raising Awareness**

Communicating the commitments set out in this policy is essential to delivering successful training and development for Members. This will be achieved through:

- The Steering Group creating a supportive environment in which all Members feel able to take part in and take control of their own learning and development ;
- The role of the Council's Management Team in reinforcing the Council's commitment to developing officers and Members alike and raising the profile and awareness of this policy and the commitments within it;
- The Senior Member Support Officer in providing advance notification of the core programme and events, involving and informing Members as early as possible and proactively seeking their engagement;

Provision of IT&T, in terms of using the intranet and other means to provide ongoing information on the policy, the core programme, emerging training opportunities and the Council's evolving approach to developing Members.

## Key Strategic Elements

### Induction:

- A comprehensive induction programme of training for every newly elected Councillors, enabling them to 'fast track', learning about the organisation and supported by the following:
- an induction day to meet key senior Councillors and Officers and learn more about corporate and constitutional processes
- a 1-2-1 with the Senior Member Support Officer to discuss the support available to them and to identify any individual needs or concerns confidentially;
- an induction pack setting out the entitlements, support and guidance available, together with other useful information about the Council and it's processes;
- a six month review (1-2-1) to check 'satisfaction' levels and to identify any areas of concern

### Personal Development Reviews:

- A personal development review (PDR) for all Councillors to identify individual needs in a safe and confidential environment with a trained consultant. A confident Councillor will naturally be more effective in taking forward the Council's improvement agenda and ensuring the delivery of strategic aims and priorities.
- An annual PDR review to check how the outcomes from the PDR have progressed and review individual development or training needs as a result of changes in roles, lifestyle or working practices;
- An annual review by MDSG relating to the personal development review process. Such a review will look at outcomes from the process and actual reviews undertaken, and identify any key themes which need to be fed into the Annual Core Training & Development Programme

### Core Annual Training & Development Programme:

An annual core programme will be developed in consultation with the MDSG based on:

- identified needs from Personal Development Reviews (PDR's);
- the requirements of new legislation and emerging corporate themes;
- the Corporate Strategy and emerging corporate themes;
- ethical and governance requirements and changing standards;
- the impact of any scrutiny recommendations in terms of changing corporate practice;
- emerging themes or developments from partners

### Seminars and External Conferences

- Attendance at seminars and conferences to inform learning on specific and specialist subjects, for instance as an Executive or Scrutiny Member or serving on a particular Committee;
- A commitment from each groups elected representative on the Steering Group (MDSG) to gain feedback from group Councillors attending conferences etc, to assist in future proofing conferences/seminars;
- A protocol to manage attendance at external conferences/seminars will be overseen by the Steering Group (MDSG) to ensure the Member Development Budget is spent appropriately (***included at the back of this booklet***)

## Arrangements for Monitoring & Evaluation

To be of real benefit, effective training has to try to match the needs of Members, the objectives of the organisation and its partners in achieving a shared vision for York.

It is essential therefore that all provision is reviewed for relevance and effectiveness. Monitoring and evaluation processes and outcomes will:

- be open and constructive, enabling any necessary enhancements to be made to future delivery;
- be regularly monitored by MDSG and Standards Committee, to ensure delivery of objectives and continuous improvement;
- be clearly communicated to Members and the public, through the reporting arrangements to MDSG and Standards Committee;
- set clear standards for achievement. Members will be required to attend a minimum number of training & development activities in a year (12 for Executive Members and 8 for non-Executive Members);
- ensure Members achievements are recognised and acknowledged both individually and within the political groups
- encourage Members to be self-aware in recognising their strengths and weaknesses;

<b>MONITORING AND EVALUATION REPORTING CYCLE</b>			
<b>Review</b>	<b>Steering Group</b>	<b>Standards Committee</b>	<b>Full Council</b>
Annual review of policy	October	October	December
monitor of take-up of events	November	December	
	March	June	July
monitor of evaluation of events	November March	June	
Annual budget monitor	January	January	
Agree Member Development Programme	March	April	

## Looking to the Future

This policy presents a corporate approach for the provision and delivery of all elected Member training and development, setting out strategies for communicating, monitoring and evaluating training provision.

The Policy will be reviewed annually by the Member Development Steering Group to ensure that it appropriately reflects the Council's approach towards Member training and development and that provision continues to meet the needs of the organisation and its Members.

## Protocol for Councillor Attendance at Conferences & External Training & Development Events

The purpose of this protocol is to give members and officers clear understanding of the process for the approval of Member requests to attend external training, seminars and conferences. Attendance at party political conferences are specifically excluded from this protocol and all expenses associated with attendance at these events will be met by the relevant group or the individual concerned.

Requests to attend conferences and seminars fall within three categories:

- 1 Conferences which are included on the list of Annual Conferences (see Annex 1 to this protocol)
- 2 Ad-hoc Requests e.g. conferences which are received direct to the individual member from an external source.
- 3 Conferences which are received into Democratic Services which are then circulated to relevant members for their consideration

Such requests will be restricted to **a maximum of 1 per member per year**. Members are encouraged to identify in advance through their personal development review any conference with a specific theme which they would be interested in attending should the opportunity arise .

### List of Annual Conferences

#### Criteria for Attending

Details of those members who are eligible to attend annual conferences are shown in the list of approved conferences (see insert). This is the only criteria required for eligibility to attend such conferences, however, if a member wishes to send a substitute in their place, then they must seek clearance from the relevant Head of Service.

#### Approval & Funding Arrangements

Approval together with any arrangements for attendance at these conferences can be made either by the relevant directorate or by Democratic Services. The Council no-longer has a separate budget for conferences on the standing list, therefore, funding for any costs including travel and accommodation for these conferences will be meet jointly between the relevant directorate and Democratic Services. For this reason, it is essential that both departments provide a charge code to which their relevant portion of the costs can be charged.

### Other Conferences

Throughout the year members receive a large proportion of emails and flyers advertising external events at both a regional and national level.

Criteria for Attending

Members will need to ask themselves one of the following questions before requesting to attend an ad-hoc external conference or training event.

- Does the event directly relate to the priorities and work of the Council, and to their role, OR
- Does the event directly address new legislation, new “best practice” requirements, or other innovation, OR
- Does the event match any of the areas identified for development in their Personal Development Review? (PDR)  
*(Whilst priority will be given to those members who have flagged up the request through their PDR, the PDR process is not a prerequisite of a request being approved)*

Other factors will also be taken into account, which will include 'best value' (e.g. consideration of the delegate fee, travel and accommodation costs, location and whether the member has already had a request approved in that budget year.

**External Opportunities offered by Democratic Services**

Similar to ad-hoc requests, emails and flyers advertising external events are often received into Democratic Services where they are assessed for suitability / value for money etc. Subject to available budget, these may be forwarded to members who:

- Have identified the topic as a relevant area for development through their Personal Development Review
- Would directly benefit from attending the seminar due to their role/portfolio

Approval Process

Approval to attend an external seminar forwarded by Democratic Services is automatic by nature of the invitation. Members wishing to take up such an offer should respond to the Senior Member Support Officer accepting the offer of a place so that registration and travel/accommodation arrangements can be made

## Annual Conferences 2010/11

This list is a guide detailing conferences held during 2010/11 covering Council service and performance areas. Members may find the list useful to assist in prioritising an appropriate ad-hoc training opportunity in accordance with the agreed protocol.

<b>Executive Portfolios</b>		
<b>Portfolio Holder</b>	<b>Conference</b>	<b>When does it usually take place?</b>
Leader (Economic Development & Community Safety)	Institute of Economic Development annual Conference	October
	LGA Safer Communities Annual Conference	October
City Strategy	Car Free Cities	June/July
	PTRC (formerly Planning & Transport Research and Computation)	May
Corporate Services	CIPFA Annual Conference	June
Housing & Adult Social Services	National Children & Adult Services Conference	November
	Institute of Housing Annual Conference	June
Children and Young People	National Children & Adult Services Conference	November
	North of England Education Conference	January
	Positive Activities for Young People	December
Neighbourhood Services	Environmental Health Annual Conference	February
	Annual Climate Change Conference	January
	Trading Standards Annual Conference	February
Leisure Culture & Social Inclusion	PLA (Public Libraries Association)	April/May
	LGA Annual Conference for Culture, Tourism and Sport	March



<b>GENERAL INTEREST</b>
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Members on Planning	When does it usually take place?
English Historic Towns Forum	January/February
RTPI Planning Convention	June
Planning Summer School	August/September
Members on Scrutiny	When does it usually take place?
Centre for Public Scrutiny Annual Conference	June/July
Members on Standards	When does it usually take place?
Standards Board for England Annual Conference	October
Members on Social Inclusion	When does it usually take place?
Inside Government's Annual Social Inclusion Conference	October
Annual Conference Delivering Services for Gypsies and Travellers <i>(may also be of interest to members with Gypsy/Travellers sites within their ward)</i>	March
Ward Member Role	When does it usually take place?
LGIU & Municipal Journal National Conference for Councillors (Cllr '10')	February

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## Member Development Steering Group

24 November 2010

Report of the Assistant Director Legal, Governance and ITT

## Charter for Member Development Assessment Report

### Summary

1. This report puts before members the charter assessment panel's report setting out in detail their findings following City of York's successful bid for Charter Status

### Background

2. During the past 18 months the Council has been steadily improving its approach to developing members and in June of this year following submission of a portfolio of evidence Local Government Yorkshire & Humber confirmed that York was ready for assessment against the charter standard for Member Development.
3. On 28 September 2010 City of York Council was formerly assessed by an external assessment team against the Charter. The assessment team reviewed York's updated portfolio of supporting evidence and in addition carried out a series of interviews with officers and members in order to build up an overall picture of how member development was embedded and regarded within the council.
4. York was subsequently informed that it had successfully achieved the Charter and formal presentation of the award will be made at the beginning of this meeting. Arrangements are currently underway to circulate details of the achievement via the local media and internal publications and the award will be on display at Full Council on 9 December.
5. Attached at Annex A is the final Charter Assessment report setting out comprehensive feedback which is intended to inform any future plans the authority may have relating to member development

### Summary of Findings

6. The assessment team were impressed by positive comments received during the interview process from both officers and members in relation to the quality and impact of member development at both an individual and corporate level. They also commented on an effective and enthusiastic member development

steering group, the quality and scope of the annual programme and the comprehensive yet easy to read Member Development Strategy.

7. Having succeeded in gaining the Charter however, members may wish to focus on a number of areas identified by the assessment team which they suggest could be improved to further enhance the standard York has set. These are:
  - To consider ways to improve take up of personal development reviews
  - Increase the opportunity for shared learning with peers from other councils and organisations
  - A review of the evaluation form used for internal development events in order to effectively measure the impact of training both at individual and community level
  - A revised approach to the support and induction provided to members elected in-year to ensure it is comparable to that offered to members elected following the main elections.
  - A more robust system for the allocation of buddies/mentors for newly elected members
8. It is suggested that officers bring back a report looking into ways of making the identified improvements, to a future meeting.

## **Consultation**

9. No consultation has taken place at present in relation to this report however it is anticipated members may wish to consult with their groups on such matters as buddying/mentoring arrangements for new members, when further proposals are brought forward.

## **Options**

- 10.(a) To agree the above approach for dealing with the recommendations set out in the assessment report

## **Corporate Priorities**

11. Maintaining and improving upon the Charter standard is consistent with the priority actions included in the Council's refreshed Corporate Strategy. In particular the provision of strong leadership, supporting and developing people and encouraging improvement in everything we do.

## **Implications**

12. The following implications have been considered:
  - **Financial** – Any financial costs associated with the recommendations of the assessment report will be met from the existing Member Development budget managed and monitored by the Senior Member Support Officer.

- **Human Resources (HR)** – Any HR issues arising from the report relate to trainers & staff support for member development
- **Equalities** – The only equalities implications associated with this report relate to the provision of accessible induction options and support for individual members with specific needs.
- **Legal** – There are no Legal implications associated with this report.
- **Crime and Disorder** – There are no crime and disorder implications associated with this report.
- **Information Technology (IT)** – There are no IT implications associated with this report
- **Property** – There are no property implications associated with this report
- **Other** – There are not other implications associated with this report.

### **Risk Management**

13. If members fail to address the recommendations made by the assessment panel and does not actively take measures to improve upon the standard set there is a risk of losing the charter award at the point of re-assessment in 3 years.

### **Recommendation**

14. It is recommended that a further report outlining ways in which the areas identified in the Assessment Report can be addressed, be brought back to a future meeting.

### **Contact Details**

**Author:**

Amanda Oxley  
Senior member Support Officer

**Chief Officer Responsible for the report:**

Andrew Docherty  
Assistant Director Legal, Governance and ITT

Dawn Steel  
Democratic Services Manager

**Report Approved**

**Date** 17/11/11

### **Specialist Implications Officer(s)**

**Wards Affected:**

**All**

**For further information please contact the author of the report**

**Background Papers:**

None.

**Annexes:**

Annex A –Charter for Member Development – Final Assessment Report



Local Government  
Yorkshire and  
Humber



## City of York Council



## Assessment Report

November 2010

## 1. Introduction

City of York Council made a formal and public commitment to the development of its elected members, and to the achievement of Charter status in March 2009. They were formally assessed and achieved the Charter for Member Development on 28<sup>th</sup> September 2010.

***Local Government Yorkshire and Humber (LGYH) and Local Government Improvement & Development (formerly the IDeA) are pleased to announce that City of York Council has been assessed against the national standards developed jointly by the IDeA and Regional Employers' Organisations, and is hereby awarded the Charter for Member Development.***

The assessment team comprised

- Councillor Val Slater, City of Bradford Metropolitan Council
- Mike Leitch, Lead Assessor (Y&H Region)
- Karen Weaver, Workforce & OD Services Manager, LGYH
- Kay Sidebottom, Member Development Officer, Leeds City Council

The charter assessment process for City of York Council involved the following stages:

- Completing a detailed self-assessment of the member development process at City of York Council and compiling a portfolio of evidence
- A pre-assessment site visit by Mike Leitch, Karen Weaver and Kay Sidebottom on 3<sup>rd</sup> June 2010 to meet with the officer responsible for Councillor Development and her 'line manager' to discuss in detail the self-assessment document, review the portfolio of evidence, and in general the way that member development was structured and delivered by the Council.. The purpose of this visit being to check the readiness of the authority for formal re-assessment.
- A full day formal assessment visit on 28<sup>th</sup> September 2010 during which the assessment team held 1:1 meetings with the Leader of Council, Chief Executive, Head of Civic and Democratic Services, leaders of opposition groups and a cross-section of elected members. In addition, the team interviewed members of the Member Development Steering Group (as a group).

This report represents the team's findings, based on the interviews that took place and documentary information made available before, during and following the site visits. The commitment to achieving the Member Development Charter is entirely voluntary and the judgements are those made by peers against the Charter criteria.

Finally, the assessment team would like to thank **Amanda Oxley** (Senior Member Support Officer) for her hard work and support before and during the assessment visits, and everyone we interviewed during the assessment process for their openness, hospitality and their continued support of the Charter initiative.



## 2. Executive Summary

City of York Council has a **Member Development Strategy** which identifies priorities in line with corporate values and which seeks to ensure that members are engaged and provided with the opportunity to develop and refresh their skills on a continuous basis. An annual programme describes the ways that development interventions will be organised and delivered, which reflects the individual and corporate development needs identified through Personal Development Reviews and other processes.

A cross-party **Member Development Steering Group (MDSG)** ensures that members themselves are engaged in the formulation, monitoring and evaluation of development activity of their peers. Members of that group also act as member development champions, and play a key role in the development and subsequent review of the Member Development Strategy and delivery programme.

At officer level, the **Head of Civic and Democratic Services** has overall corporate responsibility for member development and ensures that this activity is an integral part of the corporate improvement plan and aligned to the Council's Development Strategy and overall Plan. Day-to-day management of member development activities is undertaken by the **Senior Member Support Officer (SMSO)**, working closely with, and supported by her line manager the **Democratic Services Manager**.

**The Standards Committee** receive reports on Member Development prepared by the **SMSO** and **MDWG**.

The Leader, Chief Executive and an overwhelming majority of elected members strongly support the continuous improvement of councillors and recognise the value of a 'member-led' strategy and a the offer of a flexible, comprehensive programme of councillor development activity. Positive indicators included

- The Leader and Chief Executive conveyed the view that Members had become "more confident, knowledgeable and skilled" as a result of the development activities they had undertaken. This had impacted on the overall performance improvement of the Council
- An effective and enthusiastic member development steering group
- Positive feedback regarding the scope and quality of development opportunities
- A willingness to constantly review and subsequently improve the development options and opportunities available to members
- A comprehensive, concise yet easy to read Member Development Strategy

The assessment team were impressed by the enthusiasm and the extremely positive comments expressed by councillors about their development, and equally by the comments of senior officers who alluded to the impact such training had made on individual and corporate performance.

That said, attention is drawn to the following areas where further improvement could be made. These are set out in some detail later in the report together with a set of recommendations. Areas for improvement are summarised as:

- The identification of individual development needs relies predominantly on a PDR process where 1:1 interviews are undertaken by an external consultant, with the additional option of an interview with the Member Development Officer, and supplemented by a 'learning survey'. Although the number of councillors taking advantage of the offer of a PDR have risen year-on-year, the number for 2010/11 is still less than a third of councillors.
- Whilst there is some evidence to suggest that councillors from the authority engage in and share learning through development activity with peers from other councils and organisations, this is an area that can be developed further. Similarly, more could be done in regard to improving organisational learning by developing existing systems to capture the learning outcomes from/ and measure the impact of those activities.
- The evaluation process used for member development, tends to concentrate on feedback relating mainly to quality of delivery. Although quality is important, more needs to be done to link delivery to impact and how to measure individual improvement and community benefit.
- Whilst the proposed programme for the 2011 induction of new members promises to be comprehensive, more could be done in regard to the support and induction of councillors elected at by-elections.
- The Council offers a range of Buddying/Mentoring opportunities to new councillors (mainly within political groups) – feedback suggests that style, approach and quality is inconsistent and a little ad-hoc.

These points are covered in more detail within the body of the comprehensive feedback report which follows.

**Mike Leitch**  
**Lead Assessor (Yorkshire & Humber Region)**

**Cllr Val Slater**  
**City Council**

**Karen Weaver, Workforce & OD Services Manager**  
**Local Government Yorkshire & Humber**

**Kay Sidebottom**  
**Leeds City Council**

**Date: Final draft agreed by City of York Council on 15<sup>th</sup> November 2010**

### 3. COMPREHENSIVE FEEDBACK REPORT

The following comments aim to provide a comprehensive report of the assessment team's findings, as well as providing recommendations to inform the authority's future plans in relation to member development. Comments and recommendations for improvement are made following a series of 'face-to-face' interviews with officers and elected members, supplemented by a review of documentary evidence. Feedback is set out against a four key stage format relating to accepted member development 'good practice' which covers:

- Planning and Policy
- Implementation and Delivery
- Monitoring and Review
- Evaluation

The report concludes with a set of recommendations for further improvement.

#### **Stage One – Planning and Policy**

##### ***The local authority plans and invests in member development to support continuous improvement and to deliver organisational objectives***

City of York Council has clearly made efforts to strengthen the links between its member development delivery programme, and the authority's overall strategic priorities. The authority has in place a member development strategy outlining its approach and commitment to member development and support, and how this relates to corporate objectives. The formulation of a focused annual training programme based on need identified through a structured process seeks to gain impact whilst providing value for money. Regular monitoring by the authority's Standards Committee should ensure that corporate priorities are considered alongside individual development needs and that the council provides the necessary resources to support the strategy.

Corporate responsibility for councilor development lies with a cross-party Member Development Steering Group (MDSG) which is chaired by an executive member (and deputy leader). This group provide the necessary support and leadership to their peers's as well as working closely with the Senior Member Support Officer to ensure that the programme of member development activity was fit for purpose. During the assessment process, they displayed the level of commitment and enthusiasm needed to demonstrate that member development in City of York Council really was 'member led'.

Meetings of the MDSG were held quarterly and well attended. The SMSO worked closely with the chair of the MDSG regarding the agenda for those meetings, with political group representatives tabling issues identified as priority for them as well as providing feedback regarding member development activity. Member development featured regularly on the agenda for group meetings, and the SMSO met with each group leader on a regular basis to discuss identified needs and requests for support. .

The chief executive and other senior officers were able to describe the role of the MDSWG, and how member development was managed and supported, as well as

defining the link between member development and corporate improvement. Regular reports on member development were received by the Standards Committee who held a monitoring role regarding quality etc. Evidence from the latest report indicated a high level of satisfaction by members. As representatives from Town and Parish councils were members of that committee, they had access to information regarding development opportunities being offered by the council, and which were relevant to them.

Since her appointment in 2009, the chief executive (who has a background in organisational development – including member development) has adopted a 'corporate coaching role' for group leaders to ensure that they were 'on message' with the key challenges facing the authority, as well as the options open to the council to address these. She was also keen to ensure that officers clearly understood the political context in which they worked, as well as working to build and maintain mutual trust and respect between officers and members.

There was evidence to suggest that some political groups conducted their own internal discussion with members regarding individual and collective development needs, and it is assumed that those needs were fed into and considered by the MDSG via their respective members of that body. It was also the case that some groups offered their own development activities via national and other programmes organised by their respective political parties. Members were expected to share the learning from external programmes, conferences etc. However, it was not clear how effectively and consistently this was undertaken.

The authority has clearly recognised the importance of investment in member development, and there was evidence to suggest that sufficient funding had been made available to support both individual and corporate development opportunities. They had also worked (in the more recent past) with other local authorities in the North Yorkshire sub-region to ensure that any funding streams for member development were accessed, as well as encouraging members to take advantage of development activities outside the authority ie offered by other local authorities and partner organisations.

The budget appeared to cover activity, and despite severe financial pressure on all budgets, (and without wishing to pre-empt budget decisions in October 2010) the leader of council indicated that they would be held at the present level for the 2011/2012 financial year.

In regard to officer support, the authority has a dedicated Senior Member Support Officer (SMSO) who works closely with colleagues in Democratic Services. This ensures a direct link between member development and support activities. There was evidence to confirm that councillors were aware of her role as first point of contact regarding member development. The SMSO has her own development plan which is set annually through the council's staff appraisal process. However, she also had other (Democratic and Civic) responsibilities which (in the past) had tended to restrict her involvement in activities outside of York. More recently, this level of engagement had increased, and she now plays a full and active part in sub-regional and regional member development networks.

## **Stage Two – Implementation and Delivery**

### ***The local authority delivers effective and timely interventions to achieve its member development priorities whilst promoting and supporting local democracy and community leadership***

Evidence suggests that member development is commissioned, delivered and evaluated in line with a strategy that has been developed in consultation with the MDSG. This framework includes a delivery programme that incorporates

- Induction
- PDP/PDR Process
- Development Activity
- Promoting and Supporting Local Democracy

### ***Induction***

Councillors are elected to City of York Council in ‘all out’ elections every four years – the next being in May 2011. Whilst this brings many benefits (including continuity), it also means that the council’s induction programme isn’t ‘tested out’ on a regular basis. Whilst evidence provided by a sample of councillors elected at the last election in May 2007 indicate a high level of satisfaction in their induction, others elected at subsequent by-elections were less positive.

During the past months, the MDSG supported by the SMSO and other officers have been reviewing and developing the induction programme, and producing an induction strategy for elections in May 2011. During that process, they have considered good practice examples from other local authorities, and the Leadership Centre for Local Government as well as existing practice. The agenda for the meeting of the MDSG (held on 15<sup>th</sup> September 2010) included a review of the document ‘The 21<sup>st</sup> Century Guide to Member Induction.’

The councils approach to induction in 2011 will include the provision of information at the pre-election stage. This will be provided through ‘A Councillor - Who Me?’ sessions which are open to prospective candidates and members of the public. These sessions are designed to provide an insight into the day-to-day roles of elected members and the support and training open to them on election. These events will be promoted in September and December 2010. Prospective candidates will also be contacted by letter providing them with advance notice of the induction programme and associated procedures following successful election. Information will also be provided on the Council’s website.

Although still at the ‘draft stage’, it is likely that the induction programme will include the following sessions:

### **Election Day**

- Welcome letter to be handed to successful candidates (at the count) inviting them to meet the Chief Executive during the course of that week to declare their acceptance of office

- What happens next? – Quick Start Pack issued to successful candidates – including an invitation to the initial induction event (that will involve meeting the directors). Pack will also include contact information re support and development, a copy of the Councillors Guide (code of conduct and declaration of interest) and a form for members to complete regarding their personal data for setting up payroll and ITT connection etc.

### **Week 1**

- Briefing on Code of Conduct and signing of their acceptance of office (option of afternoon or evening session)
- Meet the Directors session, headed by Chief Executive, which in addition to hear about services, will also provide an opportunity to hear from experienced councillors on what to expect, and some useful hints for getting through the first few weeks.
- Information about the PDR process
- An introductory session on the decision making process, role of scrutiny etc
- Photocall – photos for councillors web pages etc.

### **Week 2**

- 1:1 with SMSO to cover a range of information including
  - Support and entitlements
  - Induction and training
  - Accessing meeting info 'on-line'
  - Agree a date for PDR
  - Facilitate photo swipe card issue
  - Discuss IT equipment needs and arrange installation/set up
  - Accessing minutes and reports
  - Introductions to staff working in the Guildhall
  - Councillors Handbook and Zone 47 (internet support site for members)
- Tour of council departments and offices (including visit to new council offices)

### **Week 3**

- Briefing for new members on 'What to expect at Full Council and Annual Meeting'
- Neighbourhoods Workshops – getting to know your wards, neighbourhood officers and getting to grips with Ward Committees and surgeries

### **Week 4**

- Training session – essential planning for all members on Planning Committee
- Role of Scrutiny – a session for all councillors on the basic principles of scrutiny and how members can engage in the process

### **Week 5**

- Training Session – Essential Licensing Training for members on licensing committee
- Interactive workshop – time management

- Personal Development Plans – commence and continue through June/July (initially for new members and members with new roles, then roll-out to established members)

### Week 6

- Workshop – Speaking in the Chamber.
- Workshop – the ethical framework

### Week 7

- An introduction to the 'Weird and Wonderful World of Local Government Finance' (joint session with North Yorkshire County Council)
- Interactive Workshop - Effective working with young people

### Note:

1. **Sessions are offered at varying times during the day/evening to allow for maximum attendance**
2. **Sessions are also open to 'established councillors as an opportunity to 'refresh' skills and knowledge**

In addition to the above sessions, consideration is also being given to the provision of

- 'drop -in' induction workshop on ITT so that new members can come in and ask questions, seek guidance on emails, intranet etc
- Dealing with casework and individual complaints/enquiries from residents

In addition to newly elected members, support was also offered to new executive members, or in circumstances where portfolios were changed.

The Council also provide 'buddying support to new members (usually through party arrangements), although comments offered during the assessment process indicated that the quality and effectiveness of such support lacked consistency.

It is customary for the authority to undertake a six-month review with new councillors to provide them with an opportunity to feed back on their development progress and support requirements.

The MDSG and SMSO are currently in the design stages of producing a member handbook which they plan to issue to all councillors after elections in May 2011. In past induction years York produced a paper handbook, which Members were encouraged to keep as a reference document. However, for the 2011 election, they are planning a more robust handbook for all members that will be in the form of a A5 ring-binder format with dividers, containing statistical information about York and its wards, as well as policy, constitutional and member development information .

***PDP/PDR Process***

There has been a Personal Development Planning process in place for at least 3 years with all councillors offered the opportunity of a 1:1 Personal Development Review. Undertaken by an independent external consultant, these interviews have used the IDeA Political Skills Framework as a basis on which members can compare their own skills level against a national framework based on a comprehensive review of what a councillor does across a range of activities in their ward and 'town halls'. In 2010 the council also introduced more specific role profiles which were integrated into the PDR process.

These interviews follow a fairly standard, well proven format where discussions provide an opportunity for members to reflect on their achievements during the previous 12 months, as well as identifying present and future challenges together with a two way discussion about development options.

There has been a small year-on-year increase in the number requesting PDR interviews, and it is pleasing to note that many senior councillors (including the Leader, leaders of opposition groups, several executive members and all members of the Member Development Working Group) had supported the process by undertaking PDRs in 2010. That said, there is still room for improvement in terms of engagement, and the MDWG may wish to consider ways to do this ahead of PDRs in 2011.

In the more recent past, the PDR interviews have been held in the Autumn, which the authority recognise as being a little late in the member development planning process. It is understood that there are plans to hold PDRs soon after elections in 2011 – starting with newly inducted councillors.

Feedback indicated that the majority of councillors who had taken the opportunity to be involved in the PDR process had found it useful, not only in terms of identifying development and support needs, but also preferences relating to delivery methodology. The 1:1 interviews were also seen as a useful opportunity to capture other more wider based member concerns which could not be addressed elsewhere.

In addition to PDRs, the development needs of councillors are captured by:

- An annual Member Development Survey – a questionnaire to capture information from those councillors who have not engaged with the PDR process
- Regular discussions involving the SMSO and senior officers – to capture specific portfolio related need, and to ensure that the annual programme was aligned to corporate priorities

***Development Activity***

There was clear evidence to suggest that the council 'development offer' to members was 'inclusive' and included a range of delivery methods that met their different learning styles and preferences.

Learning opportunities and activities are part of a core annual training and development programme based on Personal Development Reviews and refreshers in addition to identified organisational and statutory training requirements. Examples include:



- Presentations
- Facilitated discussion
- Pre-Council Briefings/regular updates
- National Leadership Programmes
- Mentoring (internal and external)
- 1:1 IT support
- Skills workshops
- E-learning opportunities
- Shadowing (internal and external to the authority)

Members confirmed that they received timely and regular information regarding development opportunities available to them. Details were presented in the annual programme, and reminders circulated via emails, 'flyers', the intranet, and in hard copy. Information was also circulated to Group offices. Care was taken not to schedule activities on dates that clashed with other corporate events/religious celebrations etc. Where required, additional briefings were organised and details circulated to members.

There were mixed comments relating to the value to councillors of producing an annual programme. Those in favour stated that plenty of advance notice allowed them to plan their diaries around development activity. Those against, thought that receiving the programme so far ahead encouraged them to feel that there was little urgency to book until later, and then some forgot, or mislaid the programme. Perhaps this is an area for the MDSG to review in their annual survey.

Feedback, suggested a high level of satisfaction with the quality and scope of development activity provided by the Council. All elected members were offered development opportunities that included access to staff development programmes (where appropriate), bespoke workshops, external programmes, and activities provided within political groups. 1:1 IT support was also available to members. Places on relevant development activities were offered to Parish and Town Council members, co-opted members of scrutiny commissions etc. and where required, special needs were catered for. Feedback also suggested that councillors welcomed the opportunity to undertake joint training with their peers from other authorities and partner organisations as well as a wider use of members in delivering sessions.

Predictably, it was also noted that more often than not, member's comments seemed to relate to courses and not other wider development opportunities such as meetings, peer mentoring, etc. Although this is not a major area of concern, it does raise the question that if members do not see the opportunity to learn from non-course based activity as learning, then they may not seek to engage in them to address a development need. It is also the case, that the learning from such activities is very rarely captured or recorded.

There is evidence to suggest that there are still some councillors who chose not to engage with the member development process, or only to attend sessions /updates that are mandatory (Planning, Licensing etc) or which are linked to the payment of an additional responsibility allowance. This is common in every local authority and recognises the voluntary nature of member development, and/or a reluctance to admit to a particular development need – which may be seen as a weakness.

Work-life balance issues and caring responsibilities and/or coping with the demands of managing a career often meant that some councillors found it difficult to access development opportunities. Despite the willingness of the council to explore various

options relating to time and place of activities and posting notes, handouts etc on the intranet, some councillors still experienced access problems.

Although attempts by the Council to promote the use of e-learning and other computer based programmes had met with a patchy response by members, feedback suggested that there could be more research undertaken regarding the use of web-based learning which might help those who found difficulty in accessing courses/development activity held during the day or early evening. Suggestions included the wider use of 21<sup>st</sup> century technology such 'podcasts', 'twitter' etc. The recent development of **Zone 47** – a dedicated section of the Council's intranet site is seen as a positive step in this regard.

The Council actively encourages and provides opportunity for members to participate in joint development with a wide range of external partners and other local authorities. Each year places are offered on the Leadership Academy. Other joint development opportunities have (in the past) been made available via the North Yorkshire Improvement Partnership, however these opportunities had been funded by short-term funding from central government, and might not be available in the future. Members representing the authority on external bodies were also encouraged to take advantage of any relevant and suitable development opportunities on offer. Despite this provision, there is scope to develop (and offer) more activities that would provide an opportunity for councillors, officers and members of the public to learn together.

There appeared to be clarity regarding member and officer responsibility relating to member development and support, and members appeared pleased with the level of officer support they received.

### **Stage Three – Monitoring and Review**

#### ***The local authority monitors and reviews the ongoing effectiveness of its member development activity***

There is evidence to suggest that City of York Council undertakes regular reviews of the Member Development Strategy, overall training and budgetary provision. Information from the PDP process goes to inform actions taken and considerations made by the MDSG to improve the 'offer' to members. The Executive were kept up to date on member development by the Chair of the MDSG. Political Groups were kept informed and encouraged to comment via their respective members on the MDSG. As previously stated, the Council's Standards Committee received regular reports from the SMSO and MDSG.

In the spirit of continuous improvement, the authority might also wish to consider other ways to review the activities of those officers /elected members involved in the member development process such as:

- 'benchmarking' against the MDSGs of other authorities who have either achieved or are working towards Charter status. Meeting other member bodies with similar remits would provide an opportunity to compare and contrast practice and process. This is also a useful way of discovering innovative ways to promote and deliver member development and measure the impact of member development activity on both the council and community.

- Commissioning a scrutiny review of member development – an activity used by other authorities to ‘test out’ member development processes and practice where it is felt that a review conducted by other members (not involved in member development) might be easier to accept than one undertaken by officers.

It is stressed that these are measures that the authority might wish to consider in the future, and the award of Charter status is not dependent on the completion of such activities.

### **Stage Four - Evaluation**

#### ***The local authority adopts a robust approach to evaluate the effectiveness of its member development investment, which is fully deployed across all areas of activity and investment***

Measuring the impact of member development processes and activity on individual and collective performance improvement can be the most difficult stage of any development framework. In common with many other authorities, City of York Council relied on levels 1 and 2 of the traditional Kirkpatrick evaluation model to do this. A combination of post-activity questionnaires (happy sheets), member satisfaction surveys, feedback from PDRs and political groups together with the anecdotal comments of officers were used to help the authority evaluate its programme of member development activity ensured the delivery programme was relevant, fit for purpose and value for money, but did not involve impact assessment.

According to the documentation provided for assessment, ‘every training intervention had clear objectives outcomes which linked back to Corporate priorities’, however from the comments made by members during assessment interviews, some of them admitted that they had undergone development without a clear idea of how this might improve performance.

Feedback suggested that members were ‘comfortable’ with the completion of post activity questionnaires, although a number admitted to not fully understanding what subsequent action occurred, or how useful the feedback data was. There were also some who felt rushed at the end of an event as they needed to get away, and consequently completed the questionnaire without much thought. Perhaps the authority may wish to consider offering members the option of completing post activity evaluation ‘on-line’ via the intranet. (perhaps this could be introduced via Zone 47).

Although not a Charter requirement, the council has recently introduced exit interviews with the intention of gaining as much feedback as possible from members. Evidence from elsewhere suggests that ‘exit interviews were considered to be a useful source of information regarding the ‘health’ of an organisation, and could capture issues that might have been resolved through some form of development intervention. Some councillors who wish to stand in future elections might welcome the opportunity to discuss issues, or simply helped to come to terms with the loss of their seat.

The authority’s **Member Training & Development Policy** contains a **Monitoring and Evaluation Reporting Cycle** that sets out when and by whom the various strands associated with member development are evaluated.

## 4. AREAS FOR IMPROVEMENT

As previously mentioned in this report, City of York Council has achieved the required standard to be awarded Charter status, the following comments and recommendations are offered in that context and to provide a degree of future focus for those councillors and officers involved in and/or with responsibility for member development.

### 4.1 Planning and Policy

There was clear evidence to support the view that the MDSG was representative in its membership, effective in the way it conducted its business, and confirmed the view that member development in City of York Council is 'member led.' That said, a number of issues needed to be explored in order to prepare them for the future

Successful assessment against the Charter standard will inevitably lead to greater expectations, and comparison with other authorities. It was therefore important for the MDSG to 'raise their game' and profile, and operate in an even more strategic way.

Each local authority is different in their approach to member development and many have developed programmes and systems that York might wish to think about exploring. Learning from and with other local authorities who have already gained or who are aspiring to gain Charter/Charter Plus status would bring opportunities to learn new approaches.

LGYH are ideally placed to facilitate and support such exchanges of ideas and good practice.

#### ***Recommendation 1***

***That the MDSG establishes contact with, and 'benchmarks' against other local authorities who have achieved or seeking to achieve Charter/Charter plus status***

### 4.2 Implementation and Delivery

Whilst there is clearly a very positive view of the quality and quantity of training being provided by City of York Council, many members and officers referred mainly to 'training courses' rather than a broader range of development. Trying to 'capture' the learning from meetings, and 'on the job' learning can be extremely difficult' but could be something that is referred to during PDR interviews, as could the introduction of some form of self-assessment (pre and post activity).

The introduction of role profiles to PDRs will help, but the authority might wish to incorporate a strategy to engage those councillors who cannot or will not take advantage

of the PDR 'offer' and that identified the reasons behind this. The feedback from such an exercise would inform future decisions around delivery.

### ***Recommendation 2***

***That the PDD/PDR and other processes be adapted to include:***

- ***some form of reflection on what and how members learn in other (less structured) situations***
- ***clearer information that explained why the interviews were important, the benefits etc (to stimulate wider engagement)***

Members are actively encouraged to take on external roles, representing the Council on sub-regional and regional bodies. This was viewed as a way of developing skills and knowledge whilst also raising the profile of the authority. Councillors are also provided with the opportunity to learn with and from their peers on external programmes. Although some groups insist on feedback as a condition of attendance at conferences etc, there was little evidence as to how learning from those activities is shared or transferred within the authority, nor recorded (in order to avoid duplication). There appeared to be a lack of consistency regarding:

- How councillors feed back from external events
- How councillors share the learning from sitting on external bodies
- How councillors with formal roles on the LSP/other partnerships feed back
- How that learning is recorded

### ***Recommendation 3***

***That the authority adopts some formal mechanism which requires feedback to an appropriate audience, and which identify appropriate recording methodology***

While the proposed induction programme and plans for the 'all-out' election in May 2011 appear to be comprehensive, similar care and support should be provided to councillors elected at by-elections albeit in a scaled down format.

### ***Recommendation 4***

***That the authority consider how best to provide suitable support to councillors elected at By-Elections, and develop a suitable induction programme for such situations***

The current practice of providing 'buddies' to newly elected councillors is to be applauded, however the Council could make this more effective if they considered ways to address issues relating to 'matching' and consistency.

### ***Recommendation 5***

***That consideration be given to the effectiveness of the current 'buddying' system, and ways to improve it (in preparation for the May 2011 elections).***

### **4.3 Monitoring and Review**

Evidence suggests that there are sufficient and efficient arrangements in place to monitor and review member development.

### **4.4 Evaluation**

There is clear evidence that the authority seeks to measure the impact of its investment in member development activities i.e. member surveys, monitoring of attendance levels, completion of evaluation forms and induction evaluation. However, the evidence presented, suggests that this approach is primarily concerned with measuring the quality of delivery provision as opposed to impact on individual performance or on the community.

#### ***Recommendation 6***

***That the authority consider the development of a more robust and comprehensive outcome focused approach to member development, building evaluation in to every stage of the member development infrastructure as well as delivery activity. This should enable the authority to be clear about outcomes/impact it is seeking to achieve from their investment.***

To achieve this, the authority may wish to consider the following:

- Producing a clear policy statement within the member development framework/strategy documentation that described in detail how evaluation would assist the council in measuring the impact of its investment in member development.
- Having explicit clear roles and responsibilities regarding those bodies and individuals involved in the evaluation process
- Introducing questions in the documentation used for post-activity feedback that encouraged members to rate their performance (using an appropriate scale) pre and post activity, and how undertaking the activity had impacted on their community (ies)
- Engaging in some form of comparative 'benchmarking' activity with other similar sized authorities which might produce data/good practice approaches to evaluation.
- Exploring evaluation 'models' from other sectors

This approach could also improve the quality and consistency of the information being fed into the MDSG, to enable that body to monitor progress against the overall training programme, to inform decision making about emerging priorities, and future plans. Subsequently this could also enable the MDSG to carry out an annual value for money assessment.

**Final Draft Report prepared by Mike Leitch  
on behalf of the LGYH Charter Assessment Team  
and agreed by City of York Council on 15<sup>th</sup> November 2010**

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## Member Development Steering Group

24 November 2010

Report of the Assistant Director Legal, Governance and ITT

## Ageing Well Programme of Development Support for York Members

### Summary

1. This report outlines a proposal from Local Government Improvement & Development to provide elected members with a range of development support in order to meet the challenges of York's ageing population.

### Background

2. The Council is currently undertaking a corporate review of its strategy to meet the needs and aspirations of its older citizens and wishes to take a broad approach to ensure a wider understanding of the ageing agenda within the Council beyond the confines of Adult Social Care.
3. Local Government Improvement and Development are currently offering top tier Local Authorities a range of support to assist with the ageing population agenda and following discussion with our officers have put together a range of bespoke training options which they are able to deliver at no cost to the authority.
4. Attached at Annex A is the Local Government Improvement & Development Agencies Ageing Well Programme which supports top tier local authorities in promoting the independence and well being of older people.
5. The ageing well programme has 4 main themes:
  - Leadership
  - Strategic approach engagement of older people
  - Joined-up/co-coordinated commissioning and delivery of services for older people
6. The programme offers Councils the opportunity to diagnose what areas of work they need to prioritise, identifies good practice and suggestions for improvement products and opportunities as well as a range of development tools and opportunities which include:
  - Leadership programmes for elected members and senior managers

- Master classes across the country including:
  - Health and wellbeing – a new agenda for an ageing society 8 December in Manchester
  - Building social capital – the big society agenda for older people 9 February 2011 in Newcastle
- Peer mentoring for officers and members
- Bespoke Support

## **The proposal for Bespoke Support for City of York Council**

In order to take advantage of the offer of free bespoke support on offer, City of York Council has approached Local Government Improvement & Development to draw up a proposal based on York's needs, the resulting proposal is attached at Annex B  
The proposal outlines:

- York's requirements based on detailed discussion with Council officers
  - LG Improvement & Development's response including what level of support can be expected in delivering the ageing well agenda
  - The outputs and outcomes which can be integrated into recommendations and action planning
  - Details of the proposal and confirmation that all fees and expenses associated with its delivery will be funded through the National Ageing Well Programme
7. The proposed phased programme of development and support includes:
- A Presentation and launch of the Ageing Well programme to the Council's corporate leadership team
  - Development of bespoke Executive workshops on the challenges and opportunities of an ageing population.
  - Exploring the roles of community leaders and Older Peoples Champions
  - Possible events to Improve the engagement of older people in service delivery
  - Follow up support to ensure outputs from each piece of work

## **Consultation**

8. Any consultation in relation to the contents of this report will be with the Adult Social Services Business Support Manager, Service Delivery & Transformation in terms of what specific provision can be made available to Members

## **Options**

9. (a) To agree in principle to the proposals relating to the support and development of elected members in relation to York's Ageing Population whilst considering whether some training should be given, additionally as

part of this years core programme, or whether suitable provision should be incorporated within next years programme after any changes in Council membership following the district elections; or

- (b) To agree not to proceed with taking up the offer of funded support and development on the Ageing Well Programme

## **Analysis**

10. Firstly, Members will need to consider whether they feel the provision of this funded support is appropriate for City of York Council Members in addition to the development and support which will be provided to senior Council Officers. If the potential support for Members is considered appropriate, in the light of the ageing population agenda and the potential impact in York, Members may wish to consider whether such support should be provided now or after the District Elections.

## **Corporate Priorities**

11. The provision of training for members in this particular area is consistent with the Council's corporate aim of providing strong leadership as well as supporting the City's residents in enjoying long, healthy and independent lives as set out in the Council's corporate strategy.

## **Implications**

12. The following implications have been considered:

- **Financial** – There are no financial implications associated with this report
- **Human Resources (HR)** – None
- **Equalities** – None specifically for this council as presently constituted
- **Legal** – There are no Legal implications associated with this report.
- **Crime and Disorder** – There are no crime and disorder implications associated with this report.
- **Information Technology (IT)** – There are no IT implications associated with this report
- **Property** – There are no property implications associated with this report
- **Other** – There are not other implications associated with this report.

## Risk Management

13. No risks other than the potential loss of opportunity to gain expert knowledge and training at no cost to the Council.

## Recommendation

14. It is recommended the Member Development Steering Group consider supporting the provision of this funded opportunity for all Members and to identify when such training would most appropriately be provided.

## Contact Details

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Senior member Support Officer

**Chief Officer Responsible for the report:**

Andrew Docherty  
Assistant Director Legal, Governance and ITT

Dawn Steel  
Democratic Services Manager

Report Approved

Date 17/11/11

## Specialist Implications Officer(s)

Wards Affected:

All

For further information please contact the author of the report

**Background Papers:**

None.

**Annexes:**

Annex A – Ageing Well Programme  
Annex B – Ageing Well Proposal



Community wellbeing

# Ageing Well programme

Supporting local authorities to develop good places to grow older

# How ageing well can help your local authority

## What is the Ageing Well programme?

The Ageing Well programme supports top tier local authorities to promote the independence and well being of older people.

Older people deserve every opportunity to age well, in communities that value their contribution and experience. However, at the same time as we face unprecedented reductions in public sector funding, we have a higher proportion of older people than ever before, and statistics show that this will increase significantly in the future.

Ageing Well is designed to provide sector-led support to assist local authorities to meet this challenging agenda. The programme is delivered by Local Government Improvement and Development.

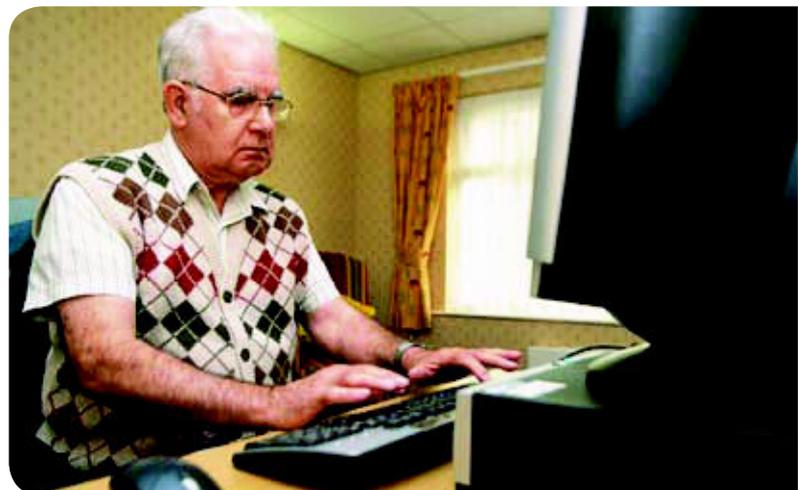
**All of the support provided by Ageing Well is available free at the point of delivery.**

The Ageing Well programme has four main themes:

- leadership
- strategic approach
- engagement of older people
- joined-up / coordinated commissioning and delivery of services for older people.

The programme works with local authorities and their partners on a number of key activities:

- supporting local political and managerial leadership
- involving older people and communities in discussions about priorities and opportunities for improving their wellbeing
- adopting more strategic approaches to prevention and early intervention
- maximising efficiencies and effectiveness through joined-up and 'place-based' approaches
- developing local solutions that deliver 'a good place to grow older'.



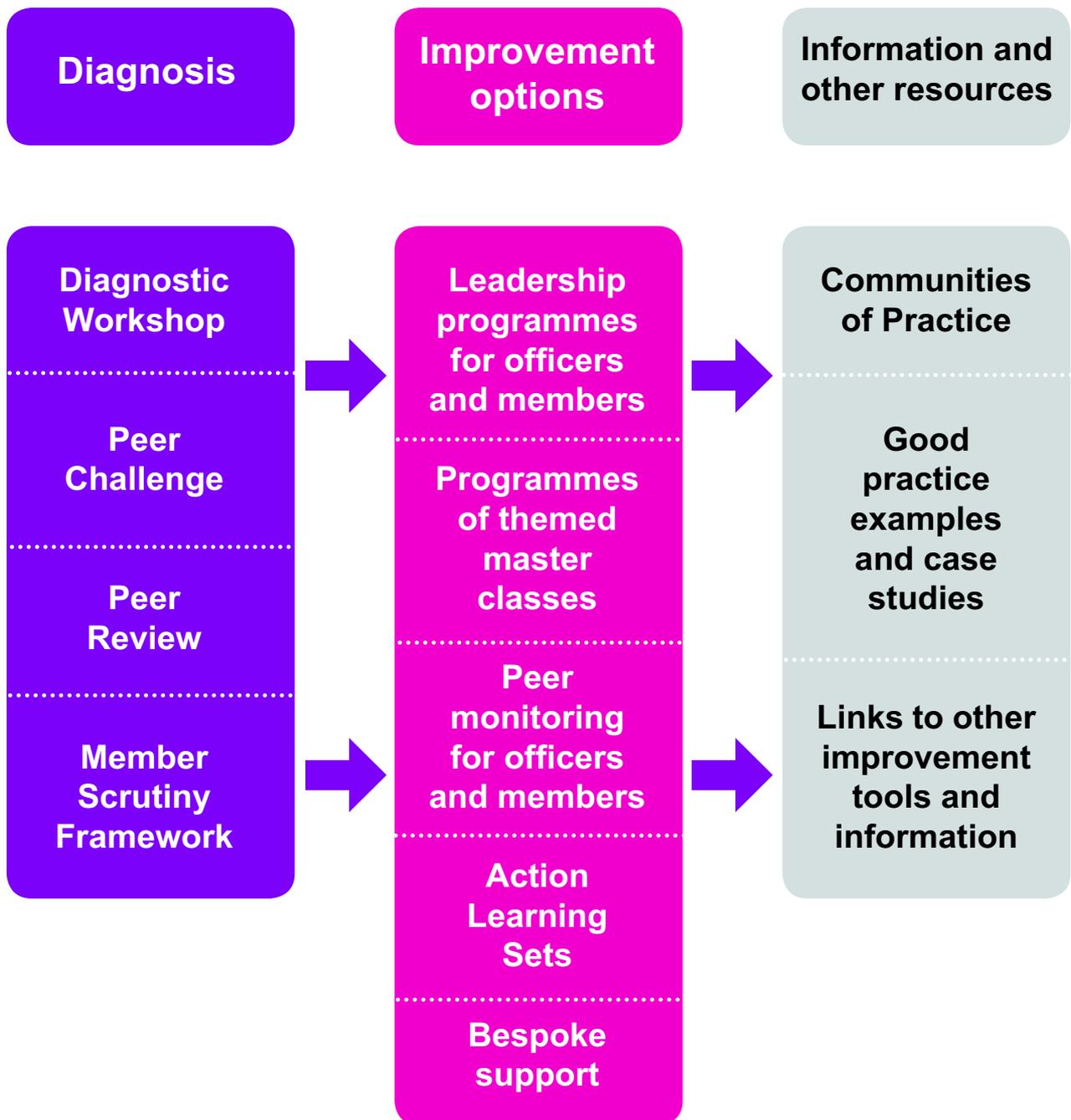
## What does the programme offer?

The Ageing Well programme has three main components:

- helping councils diagnose what areas of their work they need to prioritise
- providing a menu of improvement products and opportunities
- collecting and disseminating a wide range of information and good practice.

Annex A  
together, these components combine to provide a flexible programme of support which can be tailored to meet the diverse needs of your local authority.

Intensive work (peer review/challenge and bespoke support) will be available to about four local authorities and two local strategic partnerships in each region.



# Diagnostic tools – identifying areas for development

## Diagnosis

Ageing Well offers four tools to help your local authority or local strategic partnership to identify areas for development.

### Diagnostic workshop

This is a one-day (or half-day) workshop helping local authorities and their partners review what they do well, and identify areas for improvement. In a sense, these workshops are the ‘entry level’ diagnostic offer. Workshops are externally facilitated and the structure of the event enables key staff from your local authority and its partners to establish your development priorities.

### Peer review

The Ageing Well peer review is conducted over several days by a small team of experienced peers to generate a comprehensive picture of your authority’s strengths, and areas for improvement.

The peer support team involves people who understand the pressures and challenges of running a local authority and, in particular, the issues involved to meet the needs of older people. The reviews are individually tailored to your needs, and the action planning process will also focus on what works best for your area.

**This is not an inspection or external assessment. The purpose is to support your local authority and your partners to accelerate the improvement that you want to make.**

### Peer challenge

A peer challenge provides a shorter, more focused approach to the peer review. It is not as broad as a peer review and may focus on just one or two areas.

### Member scrutiny framework

The framework for member scrutiny can be used by overview and scrutiny committees to understand how well local authorities are preparing for an ageing society. It identifies a number of key areas which need to be addressed if local areas are to respond effectively to older people’s needs.

Bespoke support is available for a number of overview and scrutiny committees who wish to use the framework more intensively.





# Improvement options

There is a selection of improvement tools to develop a tailored support programme for your local authority.

## Leadership programmes

There are two leadership programmes:

- the leadership academy for elected members
- the leadership challenge for senior managers from your local authority and its partners.

These two leadership programmes mirror one another in content, but have a different approach for members and officers. Both have a balance of high quality speakers and opportunities to network, share ideas and to develop personal and area action plans for improving services. These are professionally facilitated events which run over two days.

Further information contact your Local Government Improvement and Development Improvement Manager.

## Master classes

There are five one-day master classes:

- **Planning for real - effective preparation for an ageing population**  
Assessing and integrating the financial implications of demographic change in the medium to longer term, into service redesign in the present.  
17 November 2010, Birmingham

- **Health and wellbeing - a new agenda for an ageing society**

How local government can make the new architecture for public health and GP commissioning work for older people.

8 December 2010, Manchester

- **Improving outcomes and efficiency**

The benefits of prevention, early intervention and sector-led place-based working.

25 January 2011, London

- **Building social capital – the big society agenda for older people**

Exploring practical options for harnessing the capacity of local communities, particularly within the context of a reducing public sector.

9 February 2011, Newcastle

- **Equal access for older people**

Practical approaches to implementing age equality legal requirements in a challenging financial climate.

15 March 2011, Nottingham

The master classes are facilitated events combining thought provoking input from high quality speakers, group work and local and individual action planning.

Further information contact your Local Government Improvement and Development Improvement Manager.

### Action learning sets

Action learning sets, consisting of approximately eight participants from different councils, are initially facilitated by Local Government Improvement and Development managers but are designed to progressively become self-managed and self-sustaining.

The methodology aims to:

- develop an understanding and vision of what improved services should look like and how these can be delivered through improved working methods
- help develop the skills required to deliver the service improvement
- contribute relevant knowledge and information to assist with service improvement.

The action learning sets have been designed for senior local government managers, but can be extended to elected members if required.

The sets can be established on a regional basis, or on a topic theme, for example, leading on from a master class or leadership academy.

### mentoring

Annex A

One-to-one mentoring is a development and learning technique aimed at increasing personal capacity, skills and learning. The approach is well-established and involves exploring needs, motivations and capabilities. It encourages and supports people to address the challenges they face.

A limited number of places are available for officers and members.

### Bespoke support

Improvement managers, linked to each region, will work individually with you to identify and respond to your priority areas of performance improvement. We also provide support for implementing the new policy context facing local government, with particular emphasis on ensuring that it delivers the best outcomes for older people.



## Information and other resources

A range of information and others resources are available.

### Ageing Well Community of Practice

The Ageing Well Community of Practice (CoP) provides an online platform for people to share best practice, ideas, knowledge and problems with others members of the community. By providing the facility, and encouraging participation, the CoP can result in rapid access to the information you want.

<http://tinyurl.com/ageingwell>

(new users will need to register).

### Links to other resources

There are clear links to good practice, useful web sites and tools for all of the areas for development identified in the self assessment and peer review. These are available through the CoP and the website.

### How do we access them?

Your initial point of contact, by region:

### h products are right for us?

Annex A

The wide range of products and services available enable you to put together a tailored programme for your organisation and partners that addresses your needs and local priorities.

The diagnostic tools of self assessment, peer review and scrutiny will help direct you to the relevant products or services that best respond to the areas for development.

Your Ageing Well regional improvement manager will guide you through what is available and help you to develop a programme for your area that will equip you to respond to local challenges.

### Cost

All the tools and support offered by this programme are free to participating local authorities/local strategic partnerships.

Further details on the overall programme are available from:

**Email:** [ageingwell@local.gov.uk](mailto:ageingwell@local.gov.uk)

**Telephone:** 0207 296 6857

**Website:** [www.idea.gov.uk/ageingwell](http://www.idea.gov.uk/ageingwell)

Region	Contact	Email	Telephone
London East of England	Kevin Halden	<a href="mailto:kevin.halden@local.gov.uk">kevin.halden@local.gov.uk</a>	07766 820150
South East South West	Yong Lee	<a href="mailto:yong.lee@local.gov.uk">yong.lee@local.gov.uk</a>	07920 107328
Yorkshire and the Humber East Midlands North East	Joy Marshall	<a href="mailto:joy.marshall@local.gov.uk">joy.marshall@local.gov.uk</a>	07766 115184
West Midlands North West	Virginia Saynor	<a href="mailto:virginia.saynor@local.gov.uk">virginia.saynor@local.gov.uk</a>	07810 828432

**Local Government Group**

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**Local  
Government  
Group**

The Local Government Group is made up of six organisations which support, promote and improve local government.

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For a copy in Braille, Welsh, larger print or audio, please contact us on 020 7664 3000.

We consider requests on an individual basis.



**Graham Terry**  
**Assistant Director – Service Delivery and Transformation**  
**Adults, Children and Education**  
**City of York Council**  
**10/12 George Hudson St**  
**York**  
**YO1 6LP**

12<sup>th</sup> November 2010

Dear Graham,

### **Ageing Well programme of development support for York City Council**

It was good to meet with you and Chris Weeks on 19<sup>th</sup> October, and find out about the work you are doing to take forward your corporate review of the council's preparedness to meet the needs and aspirations of an ageing population in York. Following our conversation, I am sending this letter which sets out an initial proposal for how Local Government Improvement and Development could provide development support to York City Council in meeting the challenges you are facing.

### **Your requirements**

You want to ensure your councillors and officers are aware and supportive of the work needed to meet the needs and expectations of older people, and want to ensure that services are effective in meeting those needs. You want to take a broad approach that ensures a wider understanding of the ageing agenda within the Council that goes beyond the confines of Adult Social Care, positively acknowledges the skills and experiences of older people, and recognises their role within local communities. You want to ensure that older people are fully engaged and involved in developments whilst raising their understanding of the issues and challenges facing the council as a service provider. In particular you:

- Are keen to increase awareness amongst councillors and officers of the challenges and opportunities an ageing population brings to the city

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[www.local.gov.uk](http://www.local.gov.uk)

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- Welcome the opportunity for councillors and officers to visit or attend events including in other local authorities and areas
- Want to provide increased opportunities for the engagement and involvement of older people
- Welcome third part endorsement from LG Improvement and Development as this is important for you
- Welcome and value challenge and support from external sources, including councillors from other areas
- Would appreciate a bespoke development programme delivered locally in York

### Our response

LG Improvement and Development are well placed to support you and are delivering the Ageing Well Programme on behalf of the DWP. This is driven by the premise that older people in our society deserve every opportunity to age well, in communities that value their experience. This programme supports local authorities to improve their services for older people within the challenging context of unprecedented reductions in public sector funding and unprecedented increase in the numbers of older people.

With this in mind, we would very much welcome the opportunity to support York City Council with a bespoke programme of development work, with a view to sharing the learning and good practice from York with local authorities nationally and with our partners in the public sector. Drawing on our experience of working with local authorities and our partners, we propose a phased programme of development and support namely:

1. Presentation and launch of the Ageing Well programme of support available to York City Council to the Council's Corporate Leadership Team.
2. Development of executive workshops on the challenges and opportunities of an ageing population. We will work with you to develop a programme for the workshops, including content and design of each one
3. We will explore in the programme the role of local councilors and older people's champions and the role of local councilors as community leaders.
4. We will work with you to improve and extend the engagement and involvement of older people in service delivery and as participants in the local community possibly through a peer challenge event.
5. Follow up support – we will liaise with you after these events and agree any relevant activity to ensure that the outputs from each piece of work

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are used to inform improvement. We will signpost you to additional support available from the Ageing Well programme, for example peer mentoring and we will work with you to share the learning and promote the approach with our colleagues and partners in the sector.

### **Outputs and outcomes**

The outputs from the programme will include feedback from all activities and work with you to integrate these into recommendations and action planning as well as sharing good practice and learning more widely across the sector. Outcomes from the programme will include enhanced strategic leadership and understanding; assist in mainstreaming the ageing agenda in York; improve the council's response to the ageing society; raise awareness of the important contribution made by older people, and ensure that the views of older people are included in service planning and delivery.

### **Our team**

The team will comprise a Local Government Improvement and Development project sponsor, Sandie Dunne, Programme Manager, a Local Government Improvement and Development improvement manager, Joy Marshall who will be the project manager, and a Local Government Improvement and Development member peer, **to be identified**. The member peer will be an accredited councillor who has had experience of member development in his or her own authority.

The project sponsor has overall responsibility for quality and delivery. The project manager is responsible for day-to-day delivery of the project. The project manager will lead the on-site team and be responsible for the preparation of deliverables.

Profiles of team members are attached at the end of this proposal.

### **Our proposition**

As discussed with Joy Marshall, LG Improvement and Development will meet the costs of supporting you with this programme of work, this includes all fees and expenses associated with delivery, through the National Ageing Well programme.

### **Working with Local Government Improvement and Development**

In order for the project to work smoothly we would need to work very closely with you. The key things we would expect from you are:

- to supply necessary key documents

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- to arrange all necessary interviews and meetings, this would include arranging rooms, facilities and confirming attendance
- if necessary to provide the Local Government Improvement and Development team with office space and facilities
- to clarify reporting requirements and agree the completion date
- to be available to answer further questions and enquiries.

Local Government Improvement and Development is committed to equality and values diversity. We are a dynamic organisation, with a diverse range of staff. We aim to reflect this in all the work that we do. We work for local government, with elected members, officers and other partners. This means that every day, we work with a wide range of people with different needs and experiences. We seek to deliver improvement support that is tailored to meet the specific needs of individuals, groups and organisations.

We will ensure that our work supports local authorities and their partners in their legal obligations with regards to equality (e.g. the public sector equalities duties on gender equality, disability equality, and race equality; human rights obligations and employment legislation). Our work managing the Equality Standard for Local Government (ESLG) means that all our teams are supported by staff knowledgeable and experienced in equalities and diversity.

The design and delivery of our work addresses accessibility covering a range of issues such as:

- physical access at events - e.g. through induction loops, timings of meetings, catering and interpreting)
- materials – e.g. being provided in different formats, following the Plain Language Commission, RNIB and other accessibility guidelines
- actions – e.g. responding well to situations that might arise, and ensuring respectful behaviour when facilitating workshops.

We will ensure that these issues are addressed, by actions taken either by clients or by ourselves in order that all relevant stakeholders can benefit from our improvement support.

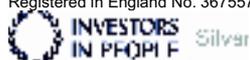
### **Making sure we deliver**

All Local Government Improvement and Development assignments are managed in accordance with our quality assurance framework. This covers, project management, client contract management, management of all relevant papers and materials, billing and invoicing, and procedures for review and sign off of all client deliverables, including presentations and reports.

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## Evaluation

Evaluating the effectiveness and impact of our projects is central to our work and our client approach. We would like to discuss with you how:

- we can jointly evaluate the effectiveness of the project during its life and at its completion
- you may wish to sustain the benefits of the project
- we could disseminate generic messages on practice more widely
- Promote the approach to the local government sector

## Next steps and contact details

Once you have confirmed your wish to accept this proposal we will confirm in writing that we can proceed as outlined in this proposal and discuss and agree a start date with you. Following commissioning we will agree a plan for the work, formalise reporting arrangements and agree these with you.

I hope that this proposal meets your requirements. If you have any queries, or wish to talk about anything outlined here in further detail please do not hesitate to contact me.

I look forward to hearing from you.

Yours sincerely,

Joy Marshall,  
Improvement Manager, Ageing Well  
**Local Government Improvement and Development**  
Layden House  
76-86 Turnmill Street  
London EC1M 5LG

Tel: 07766 115 184

Email: [joy.marshall@local.gov.uk](mailto:joy.marshall@local.gov.uk)

Tel: 07917 752 569

## Programme Team

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### **Sandie Dunne – Programme Manager**

Sandie is the Programme Manager for the Ageing Well programme and manages the core team of Ageing Well Improvement Managers at LG Improvement and Development.

Sandie has worked in public service delivery for a number of years. From 1995-1998 Sandie worked as a Principal Policy Officer in Local Government on areas including Democratic Renewal, Community Consultation and Equalities. She also undertook a number of large-scale community consultation projects working with business partners, voluntary sector and government bodies and was policy advisor on a number of ALG networks. From 1987-1994 Sandie was a Service Manager in Local Government (Finance) and from 1984-1986 Sandie worked in the Department of Health as a civil servant.

Sandie joined the National Partnerships Programme as programme manager in January 2009, following a year as the Regional Senior Improvement Manager in the South and South East of England. Her previous role was as a Senior Manager for the London Borough of Camden from January 1999 to June 2005 responsible for corporate transformational change management and service improvement.

Sandie's additional professional activities include being a mentor to third/voluntary sector managers, an Executive Coach, Chair of Governors and Interim Executive Board Member for the Department of Education.

Sandie has a BA Honours (Oxford) in Politics, Philosophy and Economics (2:1), an MSc in Research and Social Analysis and an MA with Merit (Tavistock and Portman NHS Trust) in Consultation Skills. Sandie is an accredited MSP and PRINCE II practitioner in programme management and a Qualified Executive Coach.

Email: [sandie.dunne@local.gov.uk](mailto:sandie.dunne@local.gov.uk)

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### **Joy Marshall - Improvement Manager**

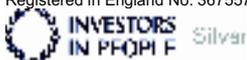
Joy is an Improvement Manager at LG Improvement and Development on the Ageing Well Programme. In this role she is responsible for working with local authorities in the North East and Yorkshire and the Humber.

Joy is seconded from Leeds City Council, Adult Social Care, where she led work to develop the Council and partners strategic approach to ageing. This included managing a team developing work across the LSP to take forward work on older people's health and wellbeing, including intergenerational work, community capacity building and engagement, and projects focusing on the digital inclusion of older people and access to information and advice.

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Joy has experience in both the voluntary sector and local government, where she has worked for the past 20 years. This has included a variety of roles from research and planning, to commissioning and policy development, with a particular interest in involving and working with local communities.

For a number of years, Joy managed the Strategic Planning team within Adult Social Care and has instigated and project managed a number of innovative projects most of which have focused around ageing. This has included Leeds LinkAge Plus pilot, and a current project working with European partners to explore how cities adapt to their ageing populations.

Joy has a BA, and an MA from Leeds University.

Telephone: **07766 115 184**

Email: [joy.marshall@local.gov.uk](mailto:joy.marshall@local.gov.uk)

Local Government Improvement and Development is local government's own improvement agency. We are wholly owned by the Local Government Association (LGA). Just over half our work is funded by a top slice of the annual Revenue Support Grant (RSG). Our share of this is less than 0.1 per cent a year. From this we lever in a further £22 million of improvement resources, through a combination of grants and paid for services, making a total spend of around £47 million. For example, our strategic development work, through central government-funded programmes on issues such as health, housing and third sector commissioning, brings valuable new improvement resources into the sector.

Our board represents local government and other key independent interests in public service improvement including business and central government.

We believe that local government has the capacity to lead its own improvement. We share learning between members, officers and across authorities and transfer knowledge of what works across the sector. We then use this knowledge to influence national policy. We believe that national proposals for public service reform need to be driven by local political priorities and the experience of citizens and customers.

We're the first port of call for support on improvement. There are nearly 400 councils in England and most will have had contact with us. At any one time, we are working on nearly 100 individual assignments with over 60 councils. We also receive support from the Welsh LGA to help Welsh councils. You're just as likely to see Local Government Improvement and Development people helping a small district council to improve its services as you are to find them at a top table discussion in Whitehall.

Local Government Improvement and Development has a network of experienced regional associates who are always available to find you the support you need to tackle the most pressing issues facing your organisation, whether it is delivered by Local Government Improvement and Development or other organisations within the local government family. They can advise on the opportunities available through national programmes, the Regional Improvement Partnerships and other channels, and they are a key liaison point with Communities and Local Government, the LGA, government offices and the Audit Commission.

Every month, thousands of councillors and officers use our information resources, attend one of our programmes or contribute to our work on national policy. We are aiming for a 90 per cent satisfaction rating for our services.

We help all councils but we prioritise and subsidise support for those facing particular leadership or workforce challenges and those in the lower performance categories.

We offer a range of bespoke support on individual services or to groups of councils with common issues. Between them, Local Government Improvement and Development people spend over 13,000 days every year with councils and their partners, helping to support improvement. We focus our work around the following five themes, the areas in which we believe we can have the greatest impact for local government:

- supporting local government improvement
- stronger political leadership
- developing a talented workforce
- improving places through partnership
- helping people and communities.

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<b>* Sign off limits</b> > £50k : Andrew Cozens < £50k : Mona Segal/Guy Robertson < £25k : Sandie Dunne/Tina Holland	

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