

Review of the Personal Development Review (PDR) Process for Elected Members

Summary

1. This report sets out further information for the Steering Group to consider as part of their review of Personal Development Reviews.

Background

2. Personal Development Reviews (PDRs) are currently offered to Councillors on an annual basis. They are one of the four key strategic elements of the Member Training & Development Policy which states:
 - 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 a review of individual development or training needs as a result of changes in roles, lifestyle or working practices
 - An annual review by the Member Development Steering Group 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.
3. During the last municipal year (2011/12) 23 Councillors have had a PDR; in the previous municipal year (2010/11) 16 Councillors took up the offer of a PDR.

Background to Review of PDR Process

4. At a previous meeting of the Steering Group Members requested that a review of the Personal Development Review process be undertaken. The Steering Group had expressed dissatisfaction with the current PDR process.
5. Currently, when a Councillor undertakes a PDR, they initially meet with an independent consultant to discuss their individual training and development needs. The consultant then collates this information and forwards it on to the individual Councillor for their sign off. The completed and agreed PDR is then returned to Democratic Services so that any training and development needs can be picked up.
6. When we last reported to the Steering Group Democratic Services had only received back 8 completed PDR forms from the 23 PDRs that took place. In effect this meant that 15 PDRs were undertaken and paid for where there were no known outcomes or identified development needs that could be followed up. However, Democratic Services have since written to Councillors for their outstanding forms and a further 3 have been returned which means to date there are still 12 outstanding.
7. Some (although by no means all) of the unreturned forms were for newly elected Councillors where it was difficult to identify development needs at the time; especially for those where PDRs were undertaken in June 2011, shortly after the election. Further PDRs were offered in October and November 2011 and there are also unreturned forms from these as well.
8. As mentioned before, PDRs are currently provided by an external consultant and are relatively expensive. It would seem that from the volume of non-returned forms they are not necessarily providing good value for money. The reluctance of some Members to return their forms could also indicate that there is a more general lack of engagement with the PDR process that we are currently using.
9. At the meeting of this Steering Group Members held on 16th April 2012 Members were presented with the following options:
 - Keep the present PDR System
 - Use another provider
 - Look at what other Local Authorities are doing

10. On consideration of these options and the papers presented at the last meeting the Steering Group agreed that PDRs were important in principle and tasked officers with undertaking more research on the options available and what was happening in other local authorities.
11. What do other Local Authorities do – e-mails were sent to 54 of the 55 unitary authorities across the country in relation to how they undertake PDRs for their own Elected Members; 30 responses were received.
12. The responses received are mixed however one of the most popular ways of providing PDRs seems to be in-house. The way they are provided varies from informal discussions with Member Development Officers to more formal PDRs with questions based around the political skills framework. However, in most instances the PDRs are focussed around identifying training and development needs rather than around assessing performance. Where PDRs are provided externally one Local Authority uses an ex-member of staff on a consultancy basis and another uses a Peer Member (presumably from another Local Authority but this isn't actually stated).
13. Take up of PDRs in other Local Authorities - take up varies quite significantly with some Local Authorities receiving 100% take up, however most do not report such good take up with one Local Authority that offers PDRs in-house not having had any take-up since 2009.
14. Quite a few Local Authorities have never provided PDRs whilst some have moved away from providing any form of PDR due to staff reductions and/or cuts to Member Development budgets. Others have changed how they provide the service and rather than formal PDRs have developed on-line surveys to ask similar questions to those that would be asked as part of a PDR. At least one Local Authority now only offers PDRs to Cabinet Members and Chairs of Scrutiny Committees.

Potential Ways Forward

15. Keep the present PDR system using the same external consultant - The Steering Group could keep the status quo and retain the present system. A reminder to Councillors of the purpose of the PDR interview and the importance of using that hour as effectively as possible to determine future development needs may be useful and this is something that Democratic Services could easily undertake, working with this Steering Group. However, if Members chose to keep the current system then it may be wise to consider what would be the best time of year to hold PDRs.

16. The current provider has suggested that PDRs give the greatest benefit when seen as a two way process. He suggested it would be sensible to concentrate on the quality of the PDR rather than on the amount of Councillors undertaking them. If some Councillors find them beneficial then that it is a positive thing and should be welcomed
17. However Members should be aware that the total spent on PDRs for the last municipal year was £1260. As there are still some Councillors who have not yet returned their PDR forms we have no identified outcomes from the PDR process, this means that effectively a substantial amount of the £1260 spent was not good value for money.
18. Using an alternative provider – there is the possibility of keeping the same system as now but looking for a different provider of PDRs, who may have a slightly different approach. However, another external provider would probably charge a similar amount to our present provider. If this were the preferred way forward then financial implications would need to be explored prior to this being adopted.
19. Providing the Service In-House - The service could be provided in-house and undertaken by an officer or officers of the Council although this may lose the independence and impartiality that we have now. However, it is not uncommon in other Local Authorities and is becoming an increasingly popular way of providing PDRs to Councillors especially in times when budgets are tight. If Members choose to go along the route of providing PDRs in-house then there may be a requirement to effectively train one or more officers on how to provide them. However, there are managers who are already trained to deliver staff PDRs, but probably none with training specifically associated to Members.
20. Whilst bringing PDRs for Members in-house could provide a small financial saving there could well be a significant impact on officer time and any in-house provision would need to be suitably resourced.
21. 360° Reviews – another alternative system is 360° reviews. These are generally on-line self assessments for Members that enable 360° feedback against the political skills framework, reporting back on skills and development needs. As an example, South East Employers¹ have developed an online service to help Councillors identify their skills and development needs. The Skills Portal is an online tool enabling both self and 360° feedback against the Political Skills Framework. It is advertised

¹ We have been asked by Local Government Yorkshire and Humber whether we would be interested in also using the system used by South East Employers

as being straightforward and user friendly for Councillors, contributors and authority staff alike. There are four key elements to the Skills Portal:

- **Self Assessment** – the Councillor captures their skills, rating themselves against statements from the Political Skills Framework developed by Local Government Group
 - **360° Feedback** – the Councillor requests feedback from a minimum of three contributors, for example, a peer, officer or member of the public. The contributor provides their opinion of the Councillor's skills and abilities against the same framework
 - **Reports** – the Councillor receives a comprehensive report exploring areas of strength and development based on their self assessment and 360° feedback. A personalised report detailing appropriate courses and resources is generated from the identified development needs.
 - **Demographics** – Additionally the tool collects demographic and personal learning preference data which can be analysed to identify over-arching needs
22. Some suppliers offer a free trial for a maximum of three people per authority and this may be something that the Member Support Steering Group may like to consider.
23. There are various suppliers of 360° systems and a suitable supplier would need to be identified should Members identify this as their preferred way forward. Members would also be advised to take a closer look at the system recommended by Local Government Yorkshire and Humber via South East Employers

Consultation

24. All Members were given the opportunity to respond to a survey in March 2012 on training & development needs. Some identified the PDR as a positive and useful tool for them whilst others were not so keen. Verbally, several Members have also made Democratic Services aware that they do not find the current PDR provision of use.
25. Consultation has also taken place with other Unitary Authorities across the country as to the processes they use for Councillor PDRs.

Options

26. Members have the following options:

Option 1 – continue with the same service as we have now but embed it much more strongly

Option 2 – identify, from the potential options set out above, a preferred system

Analysis

27. Much of the analysis of the options is contained within the body of this report. PDRs can be costly (whatever system is used) so it is important that forms for all those undertaken are returned completed to both the consultant and Democratic Services in order that any training and development needs can be clearly identified and addressed. Work could be undertaken to attempt to embed the ethos behind PDRs much more strongly. In addition to this choosing the best time of the year, dependent on the experience of the Member, to hold PDRs needs to be considered.
28. Moving to a different system could potentially be resource intensive. In the first instance identifying and putting any alternative system in place would take time. Secondly, if it was suggested that officers provide PDRs for Members then work loads may need to be altered to accommodate this or alternatively additional staffing provision sourced.
29. Democratic Services currently have Charter Status for Member Development and this is due to be reviewed in 2013. Charter Status would only be kept if any alternative option that Members may choose for PDR provision were based around the Political Skills Framework.

Council Plan

30. Having well informed and trained Members will help the Council deliver its key priorities set out within the Council Plan 2011-15.

Implications

31. **Financial** – currently the Member Development budget covers the cost of PDRs; however if an alternative system were to be chosen then costs for this would need to be identified. Any costs for any new system would need to be met from current budgets.

32. Indicative costs for 360° systems seem to be in the order of £2000 for a one year package or £4,500 for a three year package. However further research would need to be done on the actual financial implications with any preferred supplier should this be Members' chosen option.
33. It should also be noted that currently we pay per PDR undertaken so if there is little take-up the costs are much lower. However, the cost of a 360° system is static no matter whether 1 or 47 Members use it.
34. **Human Resources** – dependent on which system is chosen there may be resource issues in relation to officer time.
35. There are no other known implications associated with the recommendations within this report.

Risk Management

36. The Council was awarded Charter Status for Member Development in September 2010. In order to keep this status when we are reassessed we will need to be able to demonstrate that the Council has a structured process for regularly assessing elected Member development needs at both an individual and Council wide level; this would include the provision of PDRs.
37. There is a significant risk that Charter Status would be lost if we abandon a PDR process altogether. It is, therefore, very important that we either retain the system we have now or replace it with something equally as robust and demonstrable when it comes to being reassessed.

Recommendations

38. Members are asked to identify which, if any of the potential ways of providing PDRs they would like to progress.

Reason: in order to identify a suitable PDR process.

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**Report
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Date

Specialist Implications Officer(s) None

Wards Affected:

All



For further information please contact the author of the report

Background Papers:

None