Member Training and Development
Strategy and Policy Statement 2009
Our Strategy

1. Introduction

1.1 This document sets out our long term strategic aims and priorities for member development, that reflect the corporate vision and objectives for Southwark, together with the policy framework for delivery of ongoing learning and development programmes for members.

2. Context

2.1 The council has a responsibility to provide a wide variety of public services for, and on behalf of, the residents of the Southwark and to work in partnership to improve the economic, social and environmental well being of the borough.

2.2 The council agreed a new Community Strategy with its partners in 2006. Called ‘Southwark 2016’, it sets out the council’s long term vision for improving outcomes for people and places and for delivering quality services. It is an ambitious ten-year plan, which sets out what the people of Southwark want their borough to be like over the next decade, and what needs to be done to get there.

2.3 This core vision is defined in three aims:

- **People.** We want to celebrate the strengths of the borough’s people, acknowledge everyone’s achievements and improve life chances for all.

- **Place.** We want Southwark to become one of the best boroughs in the country. Improving everyone’s quality of life is central to making Southwark a place where people can aspire to succeed and stay.

- **Services.** We want to continue to improve and be recognised as an authority that excels in customer care. We plan to engage effectively with our communities and our partners and empower staff to deliver quality services.

2.4 The Corporate Plan explains how the council will achieve the 2016 vision in partnership with many other organisations that work to make the borough a good place to live.

2.5 Our councillors have a pivotal role to play to help deliver the aims of the council and the community strategy. In addition, councillors are involved in a range of other initiatives to help achieve positive outcomes for our residents. Our councillors are representatives, champions and leaders of their local community. They make decisions, champion change, challenge and scrutinise proposed actions, communicate council plans and take up issues raised with them by constituents.

2.6 The role of councillor is a demanding one. Strong and effective leadership is a key to effective, accountable and responsive local government. We recognise the importance of developing the capacity of members to lead, support and
progress the achievement of ‘Southwark 2016’ outcomes for People, Place and Services and be effective in all aspects of their role as councillors.

2.7 There are 63 members, 3 representing each of the Borough’s 21 electoral wards. 1 Green, 27 Liberal Democrat, 29 Labour, and 6 Conservative councillors were elected in 2006 of which 27 were elected for the first time.

2.8 The Council has a Cabinet of ten and has an overview and scrutiny committee, which appoints five scrutiny sub committees, plus a number of important regulatory and quasi-judicial committees and forums. This structure provides a range of opportunities for leadership and other roles. Many of these roles are demanding and require specific skills.

2.9 Southwark is a three star modern council that is improving well with identified areas of best practice and continues to strive to improve services for the benefit of local residents.

2.10 In December 2007 the council made a commitment to achieve London Member Development Charter (LMDC) status.

2.11 The charter sets out five principles designed to help councils build their elected member capacity. These are that there is:

- a commitment to member development
- a strategic approach to member development
- a member learning and development plan in place
- evidence that learning and development is effective in delivering capacity
- evidence that elected member development promotes work life balance and citizenship

3. Our commitment

3.1 The council is fully committed to providing the resources and support to enable all councillors to be fully effective, and to providing access to learning and development opportunities appropriate to their needs, role and experience.

3.2 We recognise that learning and development needs to be an integral part of the planning processes so that areas of priority need can be anticipated and addressed. A planned approach to needs assessment and identification, within the context of a sound member development strategy, will help ensure that councillors are equipped to help the council define and implement sound policies and drive service performance, whether as an executive or non-executive member.

4 Member Learning and Development Steering Group

4.1 In order to fulfil our commitment, a cross-party member learning and development steering group was established in December 2007. Its function has been to take strategic responsibility for ensuring that development activities are member driven, relevant, and timely and embed effective member development in the corporate culture. The group meets every six weeks and its priorities are to:
• take responsibility for the council’s strategy and policy for member development, monitor implementation and evaluate the effectiveness of learning activities;
• agree and oversee the rolling programme of learning activities to meet priority needs to meet council objectives;
• monitor and evaluate the effectiveness and the value for money of the programme;
• monitor member attendance and aim to encourage members to continue to develop and learn throughout their political careers with Southwark;
• take a strategic view of support provided to members by the council to enable them to fulfil their roles

5. The Strategy in detail

5.1 The purpose of the strategy is to ensure that we will develop, implement and sustain a strategic approach to Member Development to ensure that all councillors are always adequately equipped to carry out their role as effectively as possible.

5.2 Our strategy is in line with the principles of the London member development charter and our key priorities are that:

(i) We will ensure that the member development programme is of high quality based upon core requirements applicable to all members, undertaking specific roles and also addressing requirements identified by members themselves

(ii) We will offer a range of interventions that support both the collective and individual development needs of members, is based on agreed priorities and budget allocation and makes the best use of available resources

(iii) We will include a regular process of monitoring and review in order to ensure the member development programme is effective in building capacity and demonstrates value for money;

(iv) We value our members and provide support and assistance to enable them to fulfil current roles and future roles. We will ensure that members understand the range of services the council provides, key service priorities and national and local drivers for change; and that they know which officer to contact about particular issues

6. Implementation

Executive management

6.1 Member development falls within the Executive member for resources portfolio. The member learning and development steering group will ensure that learning and development is appropriate, relevant and addresses both individual and council needs and priorities.

Resources
6.2 Member development is part of the Organisational Development (OD) unit. OD works closely with officers, in all council departments working in key roles with members, to provide support for member development in a number of different ways. The Head of OD together with a designated member development officer will lead on member development and will report to the Executive member for resources and the member development steering group.

Key officers involved in member development include: the Chief Executive; the Director of Legal & Democratic Services; the Head of Democratic Services; the Head of Scrutiny; Head of Planning; Director of Finance as well as all Chief Officers. Close involvement with officers enables the delivery of technical and service briefings to councillors at appropriate times.

6.3 A substantial budget of around £80,000 is allocated for learning and development for councillors. The budget is managed by the Head of OD. This budget allows us to maximise investment in councillors’ development using a range of internal and external learning and development interventions. Annually, following needs analysis and consultation with the Executive member for resources and the steering group, the Head of OD will determine the budget required to meet annual priorities.

Training needs analysis and Personal Development Plans

6.4 All councillors will be invited annually to meet with a learning and development consultant to review their learning and development needs and to prepare a personal development plan (PDP). The discussion will include a review of the previous year and will focus on the councillor’s objectives for the coming year as a ward councillor and in respect of any new roles they will undertake.

6.5 To help councillors focus on and identify their learning and development needs during the PDP discussion, the I&DeA political skills framework is used together with role profiles.

6.6 The PDP is a confidential discussion with a learning and development consultant, who will as far as practical, will agree in the PDP a suitable development schedule to achieve learning objectives. This will be fed back to the OD member development officer for implementation. All feedback to officers will first be agreed with the member to ensure that where appropriate confidentiality is maintained.

6.7 At the end of PDP process the learning and development consultant will provide a general report summarising broad themes, issues and priorities that will provide insight and information for the member development planning process. This report will be shared with the steering group and the Executive member for resources.

6.8 Senior officers working in key roles with members will be invited to provide guidance on learning and development needs that will enable members to develop and be effective in their roles.

Expectations on members
6.9 The effectiveness of the Strategy is dependent on a commitment from all councillors to allocate time each year to reviewing their learning and development needs and to take an active part in the events that have been organised on their behalf.

6.10 If a councillor is unable to attend an event that has been booked for them then sufficient notice must be given whenever possible in order to avoid cancellation costs.

6.11 Wherever possible learning should be shared with colleagues.

**Feedback and evaluation**

6.12 Councillors are expected to provide feedback following attendance at any training or learning event. A short questionnaire will be given out at the end of all internal events and be sent to them for external events. Feedback will be collated into an annual report for the steering group. The steering group will also review the take-up of core training and make recommendations for improvements following a review of feedback.

6.13 Feedback and evaluation will be an ongoing agenda item for the steering group meetings to ensure that feedback is acted upon regularly throughout the programme.

7. **Equality of opportunity**

7.1 The council is committed to ensuring equality of opportunity and access to learning and development for all members. Councillors have many competing demands on their time; many have full-time day jobs or family commitments that may make it difficult to find time for their own development. The council is committed to scheduling and timing formal training events to enable members to take part in development activities at times that are convenient to them. We will also explore creative ways of delivering learning and development including web based e-learning.
Our Policy Statement

8. Introduction

8.1 This policy statement sets out the council's broad approach to member learning and development. It supports the above strategy and sets out how it will be implemented.

8.2 The council recognises that, whilst many Members will already have served one or more terms and be knowledgeable and experienced, all members have ongoing development needs. For example:

- as new members gaining core skills or familiarising themselves with specific service areas;
- as a member promoted or soon to be promoted to a position of responsibility requiring additional skills or knowledge;
- as a more experienced member looking to refresh knowledge, skills or ways of working;
- all members, requiring a briefing on key issues, such as the financial settlement, or significant changes to the standards regime, the constitution or other key procedures;
- all members, to help them keep abreast of local and national drivers for change, especially in local policies and service delivery.

9. The planning cycle

9.1 London borough elections take place every four years. Therefore, the member learning and development programme is planned on a four year cyclical basis to coincide with councillors’ terms of office with focus altering each year in response to changing councillor needs and levels of experience. A comprehensive induction programme provides an essential foundation and we will build on this throughout the following four years as members develop and change roles and as legislative and other changes occur.

9.2 Within this four year planning cycle, the members member development programme itself will be flexibly modified on an ongoing basis to incorporate events and modules, both internal and externally provided, which address newly identified development needs.

10. Councillor Recruitment

10.1 The council is committed to promoting greater engagement in local democracy and will make available for local people, on its website and elsewhere as appropriate, information about the role and responsibilities of councillors and how to become a councillor.

10.2 Prior to local elections the council will organise events providing information about the councillors role and their responsibility as community leaders, to understand what is expected of the role and to know more about how the
council operates. Such events will be undertaken primarily during Local Democracy week, including events for schools and community groups.

11. Member role profiles

11.1 In order to help identify the key elements of being a ward Councillor, a cabinet member, a scrutiny Committee chair etc., the Council has developed a number of key 'role profiles'. These also identify some of the skills and knowledge required for each role. It is intended that these will assist both Members and officers in identifying new and additional training needs and can be used to explain to potential candidates what councillors do.

12. Induction

12.1 Induction is considered to be a critical development tool to ensure that members are equipped with the skills required when they are newly appointed or appointed to a new role.

The council will provide an extensive induction programme for newly elected and re-elected members, made up of training sessions, written guidance and a tour of the borough. It will start immediately following the borough elections every four years and will cover essential topics to enable them to undertake their responsibilities quickly and effectively. The induction will continue for the first year on the council by way of additional briefings and training relevant to their particular role. In the case of a by-election a tailored version of the induction will be arranged for the new member ensuring that the same essential topics are included.

12.2 The induction handbook, which will be revised and republished every four years, constitutes the written guidance and governance, and will be made available to all members of the council.

12.3 The induction programme will provide members with a sound foundation of knowledge on the council's powers and duties; the delivery of its services; the members' code of conduct; local government finance, the inspection regime and other requirements/constraints; the council's organisational structure and principal service areas; the programme itself; and who to go to for ongoing support and advice.

13. Core skills

13.1 The council will provide ongoing core skills training for members on the basis both of needs identified by members themselves and new opportunities identified by officers. These skills cover, for example, chairing meetings, media awareness, public speaking and presentation skills, dealing with casework/paperwork, IT skills and other, more 'political', skills (some of which may be more appropriately addressed within party groups).

13.2 A significant part of a councillor's time is spend serving, and dealing with matters raised by, constituents. Whilst some matters can simply be referred to
officers, others require the member to act as advocate for the constituent and to monitor or chase-up any delay in resolution of an issue. This involves significant organisational, mediation and negotiation skills and an ability to distinguish the priority casework items. The council recognises that these important skills must be addressed, whether through training, mentoring, shadowing or some other means. The council will ensure that all new members receive, as part of their induction, training on casework management.

14. **Familiarity with statutory and procedural requirements**

14.1 The council recognises that all members must be conversant with the council's key constitutional and procedural requirements, with ethical governance (the members' code of conduct and standards regime), data protection, freedom of information and so on.

14.2 There will be mandatory training from time-to-time, for example for members of the council's Planning and Licensing Committees, or for essential topics of relevance to all members, eg changes to the code of conduct. The council will seek the support of the steering group and Party Whips to identify which topics should be mandatory and to ensure that members understand the importance of such sessions and attend.

14.3 Members will be offered briefings and/or training on the local government finance regime, budgets and financial planning, value for money and use of resources, and audit and risk management.

15 **Knowledge and understanding the organisation**

15.1 Every year the member development programme will include service updates including new initiatives, current issues and priorities. This may be delivered in various formats, including short briefings.

16 **The Ward Councillor and community leadership**

16.1 The council recognises the increased emphasis on ward councillors as community leaders and acknowledges the wide portfolio of skills each member needs fully to fulfil this role including, the core skills a councillor needs to serve constituents and handle casework mentioned previously. The member development programme will enable those councillors who have identified development needs in this area to access training modules, internal and external, to enable them better to serve as ward councillors and community leaders.

17 **Scrutiny**

17.1 The council's comprehensive development and support programme for non-executive councillors also focuses on the skills required to undertake effective scrutiny, both internally and of partners. The head of scrutiny provides regular learning and development and advises on how the member development programme can support to all members involved in scrutiny, drawing on the broad range of expert scrutiny courses available including the Centre for Public Scrutiny as well as internal briefings will reflect and take into account any specific needs identified by councillors.
17.2 The council will continue to provide scrutiny training and publicise widely the many external scrutiny training opportunities, recognising the value of networking and sharing best practice.

18. Executive development and leadership

18.1 The council provides ongoing development programme for cabinet members which includes:

- themed away days;
- the use of external facilitators to deliver specific workshops “masterclasses” on themes agreed by the cabinet
- access to I&DeA and other external programmes
- on-going briefings/planning meetings with relevant service directors; and
- coaching or one-to-one work on a specific issues where appropriate

18.2 The Mayor

The position of mayor is a special case not only in relation to the role but also because a new mayor is elected every year. The roles and responsibilities along with the procedures and protocols are set out in The civic and mayoral office - a document used to induct each new mayor through the mayor’s office. Training is provided as part of the wider member development activity as well as through specific briefings on for example chairing council assembly and attending civic events.

19. Personal development plans

19.1 At least once a year members will be offered the opportunity to discuss their learning and development needs as outlined above.

20. External training opportunities

20.1 The Council will pay all reasonable travel and accommodation costs, outside the provisions of the members’ allowances scheme, for learning and development events such as conferences and seminars organised externally. members may need to demonstrate to the officer making/authorising the booking, how the event is relevant to their responsibilities and/or how it will contribute to their individual learning objectives. members will be encouraged to participate in programmes such as the I&DeA Leadership Academy. Consideration will be given to all formal qualification courses that members may wish to take up.

21. Alternative learning methods

21.1 The council recognises that members have busy and demanding timetables and it is not always easy for them to attend formal learning and development events. Furthermore different people learn in different ways and may not always respond to conventional delivery styles. In order to address these issues, the council will seek to provide development opportunities through a variety of methods. Where practical and within budgetary constraints, the
intended range will include, presentations, workshops, individual coaching, mentoring, e-learning, on-line resources and self-directed learning.

22 Officer support to develop and deliver the programme

22.1 Several council officers will together support the ongoing development and delivery of the programme:

- Head of OD - currently John Howard;
- Head of Democratic Services - currently Graham Love
- Head of Scrutiny - currently Shelley Burke
- Learning and Development Officer - currently Angela McHale. Angela McHale will be the main contact for all learning and development communications with members and will be available to discuss any aspect of learning and development with all members as issues arise.

22.2 All officers above participate in the steering group.

23. Evaluation

23.1 In order to monitor the effectiveness and value for money of the programme, Members will be invited to complete a training evaluation form in respect of each and every learning and development event attended. Feedback will also be sought during each member’s annual one-to-one PDP review meeting.

23.2 Ongoing monitoring will ensure that corrective action can be taken as required. Generic feedback will be reported to the steering group and the Executive member for resources and also by party to the individual Whips.

24. Budget

24.1 The council will make funding available for member development and review, at least annually, whether or not this seems adequate to meet demand.

24.2 The council will seek to ensure, as far as possible, that adequate budgetary provision is available to enable all members to address development needs emerging from training and development plans.

25. Publicity and communication

25.1 Member development opportunities will be advertised widely and as far in advance as possible via a variety of means including the council calendar and member bulletin. The programme will usually be issued on a quarterly basis and notification of additional, ad hoc training opportunities will be circulated to members who may be interested.

25.2 In addition a Member Development Newsletter will be developed highlighting upcoming training opportunities and telling ‘good news’ stories from Members about helpful training or development they’ve undertaken recently.

26. Contacts and assistance
26.1 The delivery of member training and development is administered by the council's organisational development team. The principal contacts are:

John Howard
Head of Organisational Development

Angela McHale
Learning and Development

27. Skills delivery programme / action plan

- Members induction programme to respond to elections in May 2010
- Establish/integrate a learning and development member management database to assist with monitoring and tracking of development undertaken and skills gaps.
- Leadership skills training ~ review current skills of Executive and lead members in order to provide appropriate development programme (eg IDeA Leadership Academy)
- Development of a modular based approach to achieve "core skills" utilising accredited programmes, eg CMI
- Bi-annual development days.
- Support the development of a members information hub ~ micro site – members web based enquiries tool.
- Provide e-learning/videos/other information on USB sticks (members to view learning & return USB)
- Arrange back to the floor series of visits.
- Achieve the award of the Members Charter by July 2009.