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AGENDA

Pwyllgor PWYLLGOR GWASANAETHAU DEMOCRATAIDD

Dyddiad ac amser y cyfarfod DYDD LLUN, 15 EBRILL 2024, 4.00 PM

Lleoliad YB 4, NEUADD Y SIR, CYFARFOD AML-LEOLIAD

Aelodaeth Cyngorydd Lancaster (Cadeirydd)
Y Cyngorwyr Carter, Davies, Derbyshire, Elsmore, Lay, Palmer,
Jackie Parry, Simmons a/ac Thomson

Tua
Amser.

1 Ymddiheuriadau am Absenoldeb

Derbyn ymddiheuriadau am absenoldeb.

2 Datgan Buddiannau

I'w wneud ar ddechrau'r eitem agenda dan sylw, yn unol â'r Cod Ymddygiad Aelodau.

3 Cofnodion *(Tudalennau 3 - 8)*

Cymeradwyo cofnodion y cyfarfod blaenorol ar 05/02/2024 fel rhai cywir.

4 Drafft Cychwynnol - Protocol Aelodau Ar Gyfer Mynediad I Gymorth A Gwybodaeth Ymchwil. *(Tudalennau 9 - 36)*

5 Adolygu'r Strategaeth Dysgu a Datblygu Aelodau Etholedig *(Tudalennau 37 - 62)*

6 Gwasanaethau Democraidd - Gweithgareddau a Chymorth Gwasanaeth *(Tudalennau 63 - 68)*

7 Blaenraglen Waith *(Tudalennau 69 - 76)*

8 **Eitemau brys (os oes rhai)**

9 **Dyddiad y Cyfarfod Nesaf**

I gael ei gadarnhau.

D Marles

Swyddog Monitro Dros Dro

Dyddiad: Dydd Mawrth, 9 Ebrill 2024

Cyswllt: Kate Rees, 02920 873434, krees@caerdydd.gov.uk

DEMOCRATIC SERVICES COMMITTEE

5 FEBRUARY 2024

Present: Councillor Lancaster(Chairperson)
Councillors Davies, Derbyshire, Palmer and Simmons

65 : DECLARATIONS OF INTEREST

The Chairperson reminded Members of their responsibility under Part III of the Members' Code of Conduct to declare any interest in general terms and to complete personal interest forms at the start of the meeting and then, prior to the commencement of the discussion of the item in question, specify whether it is a personal or prejudicial interest. If the interest is prejudicial, Members would be asked to leave the meeting and if the interest is personal, Members would be invited to stay, speak and vote.

No declarations of interest were received in accordance with the Members Code of Conduct

66 : MINUTES

The minutes of the meeting held on 13 November 2023 were approved by the Committee as a correct record and were signed by the Chairperson, with the inclusion of Cllrs Palmer, Simmons, Derbyshire and Carter as being in attendance.

67 : MEMBER SURVEYS 2024

The Committee was provided with an update on members surveys planned for 2024 which included the plans and intentions of the Behaviours Survey as approved by the Standards and Ethics Committee to be undertaken before the end of March 2024 and the draft Neurodiversity Survey planned to be undertaken in September 2024.

Gary Jones, Head of Democratic Services, outlined that on 14 February 2023, the Standards and Ethics Committee had approved a series of questions for a behaviours survey to be launched Feb/March 2024 with the outcomes reported back to the committee. The questions would form part of a SNAP survey which would be launched and online for a couple of weeks. The survey would provide the opportunity to identify if Members had experienced or observed any unacceptable behaviours and to confirm if the reporting mechanisms were understood and used appropriately.

In order to maintain confidentiality/anonymity of responses, Group Whips would be provided with a block of numbers to allocate to members and to be used as a reference when members completed the survey. The level of responses would be monitored by Democratic Services Officers and if necessary, the whips would be requested to follow up with their respective groups to ensure that a suitable level of responses were provided.

Members were informed the survey would ask questions on the details of the experience of bullying, harassment or discrimination and then move on to the unacceptable behaviours witnessed by members to other people, investigate

reporting mechanisms to check for understanding and seek to determine whether they were being reported effectively.

Members noted that on the 21 September 2023 Council had approved a motion which included: investigating providing training to all Councillors on neurodiversity to aid in their casework in recognising the growing impact of neurodivergent conditions on the issues they dealt with on behalf of constituents; to review and implement reasonable adjustments for elected members, to ensure the role of Councillors was accessible to people with neurodivergent traits and conditions and that the skills and talents of all people could be harnessed for the benefit of the citizens of Cardiff.

To determine the training and support arrangements for councillors regarding neurodivergence, a survey had been developed in conjunction with a service area expert, Professor Amanda Kirby, to provide the basis for determining any necessary requirements.

Members were informed that the Political Group Whips had been consulted to assist in determining if it would be preferable to merge the two surveys rather than undertaking them independently. Due to the significant number of possible questions of a combined survey their preference was to deliver the surveys separately as follows:

Behaviours w/c 5 Feb 24 (Survey Launch) 01 Mar-24 (Survey End) Mar- April (Analysis) Jun-Jul (Reporting)

Neurodiversity w/c 2 Sep 24 (Survey Launch) 29 Sep-24 (Survey end) Oct – Nov (Analysis) Jan-Feb (Reporting)

The Head of Democratic Services provided an update to Members that since the report had been produced an all-party Council group had been formed as of 30 January 2024 to look at neurodiversity. Conversations had taken place with the Cabinet Member and lead officer for the Neurodiversity Strategy for Cardiff to align all work. Initial indications were that there would need to be fluidity around when the Neuro diversity survey was run for members resulting in the fact that it might take place later than September in order that an holistic survey could be undertaken. Members noted that the results would be fed back to the Standards & Ethics Committee, Democratic Services Committee and the Cabinet to progress outcomes.

Members were invited to ask questions and make observations which are summarised below:

- Members discussed the surveys and noted that the same questions would be contained in both and asked for clarification on the surveys in relation to the definition of Welsh as a first language.

RESOLVED:

- a. To note the questions identified by the Standards and Ethics Committee set out in Appendix A.
- b. To consider the proposed questions for the Neurodiversity survey as set out in Appendix B.

c. To approve the plans for the delivery of the surveys as outlined in paragraph 16 above.

d. To delegate the authority to make any subsequent amendments to the planned questions for the Neurodiversity survey to the Head of Democratic Services in consultation with the Chair of the Democratic Services Committee and the Cabinet Member responsible for the Neurodiversity Survey.

68 : DEMOCRATIC SERVICES COMMITTEE DRAFT ANNUAL REPORT 2023

Members were advised that this report was to enable the Democratic Services Committee to consider the content of its Annual Report for 2023 and approve the arrangements for the report to be finalised and presented to full Council.

The Head of Democratic Services outlined the report to Members and highlighted the headings from the Annual Report as follows:

Membership of the Democratic Services Committee

The Democratic Services Team – Support, Services and Structure

Resources

Key Activities and Achievements,

Collaborative Working and Networks

Performance Information,

Forward Plan for 2024

Members noted an amendment on page 58 to Cllr Palmer's attendance at Committee from 1 to 2 meetings and that the Chair's Forward would be added after the receipt of any further queries or comments from members.

Members were informed that following consideration of the Draft Annual Report any changes would be made as a result of members comments/queries and the report would be presented to the next committee meeting for agreement prior to its submission to Council in June.

RESOLVED:

a) To provide comments on the content of the Committee's Annual Report 2023 which would be used to update the report in readiness for consideration of the next meeting of the Committee and prior to its submission to Council in June 2024.

69 : DEMOCRATIC SERVICES - ACTIVITIES AND SERVICE SUPPORT

Members were informed that this report was to inform the Democratic Services Committee on the performance of the Council's Democratic Services Committee since the last meeting on 13 November 2023.

The Head of Democratic Services provided the Committee with an update on Member Development Activities – School Admissions and Appeals, Special Procedures (Cosmetic Procedures) (dates of sessions to be confirmed); WLGA

Essentials: Risk Management for all Governance and Audit Members (13 and 19 March 2024 4.00 pm – 7.30 pm); Cyber Security Training – MS Teams Compliance; Member Induction – Mandatory Training; Member Enquiry System (MES) Refresher Training.

Members were informed that the Welsh Local Government Association (WLGA) was providing some anti-racism training which had been identified as part of their Improvement Programme. It supported the Wales Anti-Racist Action Plan and would boost the Equalities Training provided in the Member's Induction Programme. The training covered what racism was, what anti-racism was and the impacts. Members were asked for their guidance on whether it was something they would support or whether they felt they had enough knowledge provided by the induction.

Members were invited to ask questions and make observations which are summarised below:

- In discussing the provision of anti-racism training from the WLGA Members agreed the number of compulsory courses already attended had been sufficient and covered the necessary areas.
- Members suggested monitoring the surveys for any demand in training needs of councillors.

RESOLVED:

To note the report.

70 : DEVELOPING THE RESEARCH PROTOCOL

Members were advised that this report was to update the Committee on the existing research support available to Councillors and to seek directions for the development of a Research Protocol for Elected Members.

Gary Jones, Head of Democratic Services reminded Members that the Welsh Government Statutory and Non-Statutory Guidance for Principal Councils in Wales relating to Research Support and Services for Councillors (**Appendix A**) had been considered by the Committee at its meeting on 13 November 2023.

The guidance indicated that it was for the Committee to advise on the nature and level of support for research by elected members that would be suitable for their council and the level of resources that the Head of Democratic Services might require to provide a sufficient set of services in this regard.

To determine a baseline for the existing research support, the Head of Democratic Services informed the Committee that he had carried out an assessment and directed their attention to Appendix B which contained the details of the initial assessment. Members were being asked to consider the assessment and to provide further direction prior to wider consultation with elected members.

The need to provide data analysis training was also highlighted to Members. Members were informed that Data Cymru offered a wide range of 'data focused' training courses, two of which were aimed at Councillors – Data 101 – An Introduction to Understanding and using Data and Understanding and using

Performance Data. During 2023-24, Data Cymru were offering each local authority the option of taking one cohort of members (up to 20) through the training for free and Members were asked to consider if this was something they would like to take up.

Members were directed to page 116, paragraph 19 of the report. To assist in structuring the Research Protocol it was proposed that the following categorisation be used: a Self-Service Research; b Level 1 – Simple Research Support; c Level 2 – Assisted Research Support; d Level 3 – Scoped Research Support. Members noted that Levels 2 and 3 would be directed through the Head of Democratic Services

It was proposed that Level 2 and 3 Research Support requests be submitted to the Head of Democratic Services to prioritise the request to ensure the available resources were not exceeded. The Head of Democratic Services would also ensure that these research requests were not overtly political and that they would not compromise the neutrality of officers.

Members were then directed to the questions in paragraph 14 (page 114/115) of the report as follows:

- Are there any other areas of research support which you consider should be included in this list?
- What research support has been useful in your role as Councillor?
- What could be improved?
- What information / data do you require that is not currently available on the Council's website or reports provided to committees?
- How should other members be informed about the draft Research Protocol and their views on its content be sought.
- What information / data do you require that is not currently available via external partners such as Data Cymru, Open data sources etc.
- Please list any areas of research that you may find useful to your role as Councillor, where this information is not already available in the public domain.

Members were invited to ask questions and make observations which are summarised below:

- Members welcomed the development of the Research Protocol and felt that councillors should be given more information on what they could be given in terms of resources. However, it was felt that perhaps there should be consideration of what could be achieved in terms of resources and that there should be a quota – first come first served. The Head of Democratic Services suggested that if it was an individual request for data it could be allocated by a political group and fed through and prioritised by the political group and if it was in relation to a ward issue and all 3 or 4 ward members were keen to undertake and agree a schedule could be drawn up in terms of prioritisation.

- Members agreed that Appendix B was a useful document. Information from outside bodies was useful for signposting as the research might already have been carried out.
- Members discussed the benefits of taking up the offer of free training from Data Cymru. The Head of Democratic Services to circulate the details of the training to Members to gauge interest.

RESOLVED:

a To note the content of the report and the initial assessment of current research facilities for elected Members at **Appendix B** undertaken by the HDS.

b To consider the questions in Paragraph 13 and the proposed categorisation of research as set out in paragraph 18 and provide direction for the development of the Research Protocol.

c To agree that a draft version of the Research Protocol be submitted to the next meeting of the Committee on 15 April 2024.

71 : FORWARD WORK PROGRAMME

Gary Jones, Head of Democratic Services provided Members with an update on topics for inclusion in the Committee's Forward Work Programme. These included Democratic Services – Activities & Services Support; Democratic Services Committee Annual Report 2023, Developing the Research Protocol, Review of the Elected Member Learning and Development Strategy.

Members noted the date of the next meeting was 15 April 2024 with another meeting planned for June/July 2024. Members were informed that the dates would be confirmed once the calendar of meetings was established.

RESOLVED:

To approve the Committee's Forward Work Programme

72 : URGENT ITEMS (IF ANY)

There were no urgent items received.

73 : DATE OF NEXT MEETING

The date of the next meeting of the Committee is 15 April 2024 at 4.30 pm.

The meeting terminated at 5.34 pm

REPORT OF THE HEAD OF DEMOCRATIC SERVICES

INITIAL DRAFT - MEMBER PROTOCOL FOR ACCESSING RESEARCH SUPPORT AND INFORMATION**Reason for this Report**

1. The purpose of this report is to update the Democratic Services Committee (DSC) on the initial draft of a “Member Protocol for Accessing Research Support and Information”. The committee is requested to provide their views on the draft and proposals to ensure ease of use and access to information which can subsequently be incorporated into an updated version of the protocol.

BackgroundRole of the Democratic Services Committee

2. The Local Government (Wales) Measure 2011, Part 1, Chapter 2, <https://www.legislation.gov.uk/mwa/2011/4/part/1/chapter/2> requires local authorities to appoint a Democratic Services Committee to oversee the Democratic Services functions of the Council, ensure that the work is adequately resourced and report to the full Council accordingly. The Democratic Services functions include Members’ Services, Committee Services and Scrutiny Services, but not Cabinet Support Services.
3. At its meeting on held on 13 November the Democratic Services Committee were informed of the updated Statutory and Non-Statutory Guidance for Principal Councils in Wales relating to Research Support and Services for Councillors. Initial proposals for “Developing the Research Protocol” were considered at its subsequent meeting on 5 February 2024 where the committee agreed to receive a draft Research Protocol

IssuesThe Draft Protocol

4. The Head of Democratic Services (HoDS) in liaison with the Principal Scrutiny Research Officer have utilised the information provide at the Democratic Services Committee to develop the Research Protocol. During this development it was identified that the protocol should also cover the proactive provision of information and support for Members. Therefore, the research protocol was renamed as the Member Protocol for Accessing Research Support and Information.

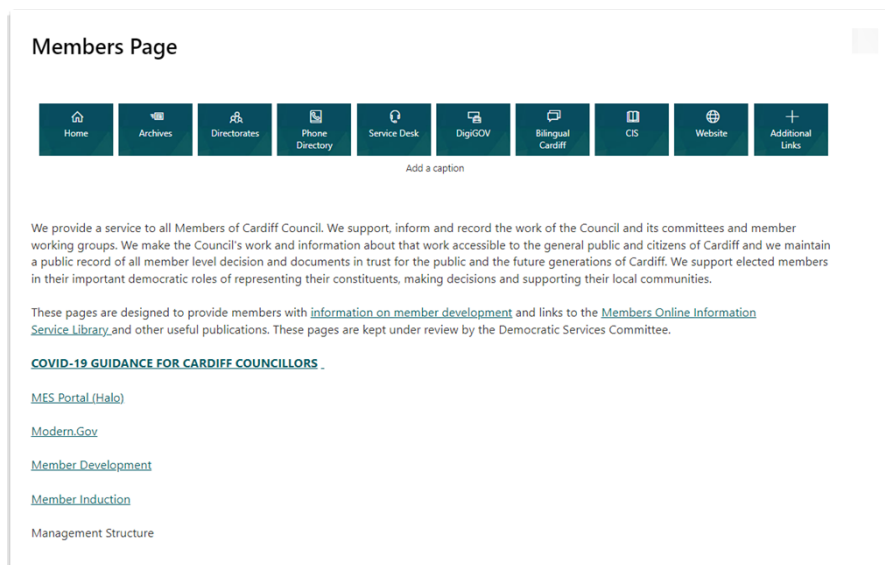
5. The new draft protocol identifies the types of information that will be provided for members (Elected, Independent and co-opted Members) to access and the support that can be provided to support members research as outlined in the Statutory and Non-Statutory Guidance.
6. The revised protocol also identifies the:
 - a. principles of good practice and compliance with existing legislation which will apply when conducting research for those involved in research to support the work of Members.
 - b. three types of research that are available for Members:
 - Self-Directed Research
 - Supported Research
 - Complex Primary Research
 - c. Corporate and open data information that can be accessed by Members.
 - d. process and requirements when requesting support to undertake research either for assisted secondary research or for providing simple small-scale primary research.
 - e. process for providing complex primary research commissioned by Scrutiny, Democratic Services or the Standards and Ethics Committees.
 - f. guidance and checklists to assist Members when developing self-directed or supported research requests.

Access to Documents and Information relating to Council or Cabinet Business

7. The Committee should be aware that this protocol is not intended to change the existing access arrangements to documents and information related to Council or Cabinet business as outlined below:
 - a) The Access to Information Procedure Rules, found within Part 4 of the Constitution [Access to Information Procedure Rules.pdf \(modern.gov.co.uk\)](#), specifically Rules 17 and 18, set out Members' additional statutory rights of access to documents relating to Council and Cabinet business; and
 - b) The Protocol on Members' Rights of Access to Information and Documents, found within Part 5 of the Constitution: [Protocol on Members Rights of Access to Information and Documents.pdf \(modern.gov.co.uk\)](#), clarify for Members what documents and information held by the Council they are entitled to see and how to request access to such information.

Improving accessibility to research information and data

8. Members currently have access to a Members Page on the Council's intranet.



9. To maximise access to data sources, guidance and checklists, it would be beneficial to develop this page and include links to open-source data and websites rather than list these evolving sites in a static document appendix.
10. The re-design of this page would provide easy access to all of the links to support the protocol with any new data and resources easily added to this intranet site. The guidance and checklists could be made available on this site as online forms which could be either downloaded for completion or enable the Supported Research requests to be able to be submitted online directly to the HoDS.
11. The intranet website will take some time to develop with the research information and deliver and it is anticipated that this could be completed by September 2024. This may also result in some changes to the finalised version of the “Member Protocol for Accessing Information and Research Support” which would then be subsequently submitted to the committee for approval.

Resources

12. The Democratic Services Team has limited resources to extend the existing arrangements for providing research facilities for Members. However, funded additional capacity is being created to support the Democratic Services Team to deliver the requirements of the Local Government and Elections (Wales) Act 2021. This post will have a cross cutting role in the team and will provide Members with additional Supported Research facilities.
13. The Democratic Services Team has access to the SNAP electronic survey software with two primary users able to create online surveys and two additional users with web access to the software to run the high-level analysis reports.
14. It is proposed that Supported Research requests will be submitted via the Members Enquiry system to the HoDS who will prioritise the requests to ensure that the available resources are not exceeded. The HoDS will also ensure that these research requests are not overtly political and that they will not compromise the neutrality of officers.

Additional resource developments

15. Recent budget savings across the Authority are being implemented and are likely to have an impact on the provision of the planned supported research. The main impact will be the arrangements for printed correspondence for small scale primary research and the provision of return envelopes for any surveys.
16. It was intended that the provision of these surveys would use part of the monthly allocation of Members Correspondence for each member to meet the costs of printing and distributing these surveys. These would normally be provided using internal facilities and which would support the inclusion of a return envelope. Clarification of how the agreed budget savings may impact this process and alternative solutions will need to be identified.
17. Options to avoid these issues may be for members to identify a suitable drop off point within their ward for any responses or alternatively the response could be scanned or photographed for return to Member Services by email.

Data Analysis Training

18. Following the previous Democratic Services Committee, free data analysis training was provided by Data Cymru including
 - [Data 101 – An introduction to understanding and using data](#)
 - [Understanding and using performance data](#)
19. These sessions were attended by a total of seven Members and were well received. Following these sessions Data Cymru advised of other courses and costs options for subsequent training. Available sessions can be found on their [website](#) and include:
 - a. [Presenting Data](#)
 - b. [Summary Statistics](#)
 - c. [Designing and delivering focus groups](#)
 - d. [Survey design and analysis](#)
20. These Courses are approximately 2.5 hours in duration and cost £50 plus VAT per delegate. Data Cymru also provide training courses specifically for an organisation. Although attendance is normally limited to 15 delegates, Data Cymru are able to provide this training at a time and date to suits the authority for up to 20 delegates and at a cost of £600 plus VAT.
21. They also publish their [training guides](#), which you can use alongside the training and offer a training programme, called [DataBasicCymru](#). The programme is designed to help individuals build their data culture by building skills and, perhaps more importantly, confidence in using and analysing data. It's a fun and interactive programme that was originally developed by researchers at MIT and was "adapted" for use in Wales by Data Cymru.

Data Governance and Protection

22. All research activities must comply with the General Data Protection Regulations (GDPR) and the Councils' Information Governance Policies and procedures.

The Next Steps

23. Following consideration of this draft protocol and any revisions proposed by the committee an updated draft protocol will be shared with Members and colleagues to ensure it meets with their requirements.

Financial Implications

24. The current research facilities for Elected Members are met from existing Democratic and Members Services budgets and reserves. There is funding for an additional post to provide further research capacity to support the draft Member Protocol for Accessing Research Support and Information. Any costs associated with potential changes to the arrangements for printed correspondence for small scale primary research would need to be identified and managed within existing resources. Any further increase to the research capacity, or the provision of additional training, would require additional sources of funding be identified in agreement of the Director of Governance and Legal Services

Legal Implications

25. Under the Local Government (Wales) Measure 2011 ('the 2011 Measure'), section 8(1)(b), a local authority must provide its Head of Democratic Services (HDS) with 'such staff, accommodation and other resources as are, in its opinion, sufficient to allow his or her functions to be discharged'; and must have regard to statutory guidance issued by the Welsh Ministers. The statutory functions of the Head of Democratic Services (under s.9 of the 2011 Measure) include the provision of support and advice to each member of the authority in carrying out the role of member of the authority.
26. The Democratic Services Committee (DSC) is responsible (under s.11 of the 2011 Measure) for overseeing the democratic services functions of the Council, ensuring this work is adequately resourced; and reporting to full Council accordingly.
27. When exercising the Council's functions in respect of providing the HDS with sufficient staff, accommodation and other resources, the Council must have regard to the statutory guidance issued by the Welsh Ministers: <https://www.gov.wales/statutory-and-non-statutory-guidance-democracy-within-principal-councils-members-support-training#125308> which includes statutory guidance on Research Support and Services for Councillors (in Part 2, Chapter 3, 'the Statutory Guidance').
28. The Statutory Guidance includes the following guidance:
 - a) 'In order to undertake their roles effectively all elected members should be able to access a range of information and support.'
 - b) 'It is for the DSC to advise on the nature and level of support for research by elected members that would be suitable for their council and the level of resources that the HDS might require to provide a sufficient set of services in this regard.'

- c) 'Councils should, through their democratic services committee, put in place a protocol or other set of rules governing how councillors should expect to be able to access and use research services, to ensure that it is accessible to all councillors and that it is used equitably and proportionately.'
29. The Statutory Guidance goes on to give examples of the research support and services the DSC should consider when making its deliberations and advises that it is 'important the DSC and HoDS should consult and involve members to shape and regularly review the usefulness and effectiveness of the support provided.'
30. The Statutory Guidance also states that 'Councils should adopt a proactive and permissive approach in how they engage with councillors' information needs' (under the heading 'Support in accessing information') and sets out a number of specific actions in this regard, including that Councils should:
- a) 'frame councillor access to information procedure rules expansively with a presumption in favour of the release of information to councillors unless a clear public policy reason exists not to'; and
- b) 'proactively provide councillors with management information and other data to ensure that they are kept informed about the business of the authority. Councils could produce an information bulletin or digest for councillors on a regular basis, subject to resources as suggested above'.
31. However, the Statutory Guidance also notes that, 'Equally, councillors should be made aware that councils are frequently under legal obligations to others with regard to maintaining the confidentiality of certain information, in particular, commercial information and personal information, and such releases could open up the council to challenge.'
32. The Council's Access to Information Procedure Rules are found within Part 4 of the Constitution [Access to Information Procedure Rules.pdf \(moderngov.co.uk\)](https://www.moderngov.co.uk/constitution/access-to-information-procedure-rules.pdf) and Rules 17 and 18 deal with Members' additional rights of access to documents relating to Council and Cabinet business (reflecting the statutory provisions of section 100F of the Local Government Act 1972 and the Local Authorities (Executive Arrangements)(Decisions, Documents and Meetings)(Wales) Regulations 2001). The Constitution Committee has responsibility for considering any changes which may be made to the Access to Information Procedure Rules in light of the Statutory Guidance (specifically, the guidance referred to in paragraph 28a) above), subject to the approval of full Council, although the Democratic Services Committee may make any recommendations in this regard.
33. The Council has also adopted a Protocol on Members' Rights of Access to Information and Documents, found within Part 5 of the Constitution: [Protocol on Members Rights of Access to Information and Documents.pdf \(moderngov.co.uk\)](https://www.moderngov.co.uk/constitution/protocol-on-members-rights-of-access-to-information-and-documents.pdf) clarifying for Members what they are entitled to see and how to access it. Corresponding changes may need to be made to this Protocol to reflect the new Statutory Guidance and the provisions of the new draft Protocol on Accessing Research Support and Information. Any such changes will be considered by the Constitution Committee and are subject to the approval of full Council.
34. In considering this matter, the Committee should have regard to the full provisions of the Statutory Guidance, Part 2, Chapter 3.

RECOMMENDATIONS

35. The Committee is requested to:

- a. note the content of the report and the draft Member Protocol for Accessing Research Support and Information as shown at **Appendix A**
- b. identify any changes that may be needed to the proposed improvements for using the intranet to enhance access to the research information and support arrangements.
- c. agree that wider consultation be undertaken with Members via Group Whips and colleagues prior to the final version of the Member Protocol for Accessing Research Support and Information being submitted to a subsequent meeting of the committee.

GARY JONES
HEAD OF DEMOCRATIC SERVICES
9 April 2024

Appendix A: Member Protocol for Accessing Research Support and Information (draft)

Background Papers:

[Welsh Government Statutory and Non-Statutory Guidance for Principal Councils in Wales](#)

[Developing the Research Protocol](#) report to Democratic Services Committee dated 5 February 2024.

Mae'r dudalen hon yn wag yn fwriadol



Cardiff Council

Member Protocol for Accessing Research Support and Information

2024

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Protocol for Accessing Research Support and Information

Reason for the Protocol

1. This protocol has been developed in-line with The Welsh Government Statutory and Non-Statutory Guidance for Principal Councils in Wales relating to Research and Information Support and Services for Councillors. The guidance indicates that Democratic Services Committee's (DSC's) should put in place a protocol or other set of rules governing how Councillors should expect to be able to access and use research services. This will ensure that these facilities are accessible to all Members and are used equitably and proportionately.

(In: Research Support and Services for Councillors Statutory Guidance Sec 3.6 p.2).

Aim of this Protocol

2. The aim of this protocol is to provide details for Elected, Independent and Co-Opted Members (subsequently referred to as "Members") on how they could access a range of targeted research support and information to enable them to undertake their roles and any work associated with it effectively. This protocol will:
 - Specify the core principles that will guide the use and delivery of the support services outlined in this protocol.
 - Set out the types of targeted research support and information that can be accessed.
 - Outline the process for Members to access these services and information to ensure that the most appropriate level of support can be accessed.

Definitions

3. Primary research is data which is obtained first hand. This means that the researcher conducts the research themselves or commissions the data to be collected on their behalf. Primary research means going directly to the source, rather than relying on pre-existing data samples.
4. Secondary research is a research method that uses data that was collected by someone other than the primary user. Common sources of secondary data for social science include censuses, information collected by government departments, organizational records and data that was originally collected for other research purposes.

Principles that will apply when conducting research to support Members.

5. In line with the principles of good practice and compliance with existing legislation, the following principles will apply to the conduct of all research and those involved in research to support the work of elected Members and their Committees.

Principle 1. Compliance to Legal and Ethical Duties

6. All Members, and Council Officers who are involved in research activities, and in tasks such as the collecting, handling, reporting and storage of data and information must be aware of their legal and ethical duties and responsibilities.
7. Particular care must be taken in the design and conduct of research to ensure that it complies with the requirements of the UK Data Protection Act 2018, General Data Protection Regulation (GDPR), the Equality Act 2010, Health and Safety Regulations and any other legislation and guidance that would be relevant to research.
8. In line with the data protection legislation, particular care must be taken to ensure the confidentiality, anonymity of participants in primary research as well as the security of the processing, reporting and storage of personal data held as part of research.
9. All information collected for or as part of the research project is recorded, handled and stored appropriately and in such a way that it can be accurately reported, interpreted and verified, while the confidentiality of individual research participants remains appropriately protected. Data collection should be managed in a transparent way that demonstrates a commitment to their appropriate use of research and appropriate protection of privacy.
10. The design and conduct of the research and those pursuing it, must ensure that requirements of the Equalities Act 2010 have been considered. It should account for and respect the diversity and the multicultural nature of communities. Where relevant, it should take account of age, disability, gender, sexual orientation, race, culture and religion and other characteristics in its research design, the collection and reporting of data and findings. Research findings, the data and information collected should reflect the diversity of the population.
11. The dignity, rights, safety and wellbeing of research participants e.g. service users, members of the public and all those involved in research must be the primary consideration when undertaking research.

12. Informed consent is at the heart of ethical practice. Appropriate arrangements will need to be set up for obtaining consent from children, from vulnerable adults, such as those with mental health problems or learning difficulties. Arrangements must be made to ensure that relevant research information on the purpose of the research and how it will be used is communicated to participants. Relevant information is provided in appropriate written or pictorial form, and that the role and responsibilities of parents, carers or supporters are clearly explained and understood.

Principle 2. Assessing Benefits and Risks

13. The approval of primary research requests and more complex research activities will be subject to an assessment of the anticipated benefits against the anticipated risks that it will bring to the participants / research respondents, to Cardiff Council. Where deemed essential, a formal, structured risk assessment will be undertaken as necessary. The risk benefit ratio, when sufficiently described and considered, will form part of the review and approval considerations for the Head of Democratic Services (HoDS).

Principle 3. Transparency and accessibility of findings

14. A record of the supported research activities undertaken for all elected members and its findings whether positive or negative can be shared with other elected members and be made publicly available in the language and format suitable for its audience. The access to these research findings will however be subject to adequate consent and privacy standards as well as compliance to the Council's legal duties and responsibilities.
15. Where required, information about research findings should be available to those who took part in the study, interested groups or communities and the general public in a format that is accessible and easy to understand.

Principle 4. Compliance with the Protocol

16. All requests for information and research support and its approval must be conducted in accordance with the requirements and principles of this research protocol.
17. Non-compliance to the protocol and its principles by those who are involved in the commissioning, approval, conduct, reporting or dissemination of research and by those who have accessed Council data and information are subject to the relevant control measures by legislation, the Member's Code of Conduct and the Information Commissioners Office (ICO).

18. Data or information sought by Members through this protocol should not be politically motivated or should not compromise Officers' political neutrality. All information and research findings generated through this protocol cannot be used for political purposes or for electoral campaign activities.

Types of Research Support and Information

19. Democratic Services will provide a range of targeted research support and information to all Members. The support that may be provided could supplement any information support that Elected Members may receive from their political groups.
20. The various types of targeted research support and information that will be made available to all Members of the Council will include:

Self-Directed Research

21. Self-Directed Research includes:
 - Easy access to the Council's corporate management information
 - Easy access to public sector information resources and open data websites
 - Training to effectively access and use public sector data.
22. The following should be used as a guide for Members undertaking any self-directed research or to clarify the requirements of a research request to Democratic Services.
 - What data or type/s of information do I need?
 - Is the information available from the Council's website?
 - Is this information available from the Council's existing published documents e.g. corporate plan, performance reports, budget report, audit report or the Council document weblinks available on the intranet?
 - Is the data or information available from Data Cymru or other public sector web-based information resources and Open Data websites?
23. A simple guide to identifying self-directed research is shown at **Appendix A**.

Supported Research

24. Supported research includes:
 - Access to secondary data, information and small-scale secondary research support.
 - Access to simple and small-scale primary research support.

25. The types of information or research support that Members could access should be related to a specific issue or issues which have an impact on their work for the Council and their constituents. The requested data, information or research support should be relevant to the delivery of the Council's priorities, scrutiny of decisions, review service performance, and the outputs or outcomes of the delivery of Council policy and services.
26. Prior to submitting a request for targeted research support and information, Members should have clear idea of the type and scope of data or information they require. This will require Members to **undertake some initial self-directed search of data or information** from the Council's internet website and the links provided on the Member Services intranet web page.

Complex Primary Research

27. Complex Primary Research can only be requested by Scrutiny Committees, Democratic Services Committee, Standards and Ethics Committee and Member Development activities to inform their work.

Access to Corporate Management Information

28. In accordance with the provisions in the Research Support and Services for Councillors Statutory Guidance (Sec 3.2 p3), Democratic Services will liaise with Council Departments to "proactively provide Councillors with management information and other data to ensure that they are kept informed about the business of the authority".
29. All Members will be able to access the current Cardiff Council corporate management information using links provided on the Member Services pages on the Intranet. These will include but not limited to:

Council

- [Calendar of Council and Committee meetings](#)
- [Council meeting webcasts](#)
- [Corporate Plan Dashboard](#)
- [Council Policies and Strategies](#)
- [Council Budgets](#)

Cabinet

- [Cabinet Forward Plan](#)
- [Cabinet Decisions](#)
- [Officer Decisions](#)

Scrutiny

- Scrutiny Committees Work Programmes
 - Children and Young People

- Community and Adult Services
- Economy and Culture
- Environmental
- Policy Review and Performance
- Scrutiny Task and Finish Inquiry reports

Planning

- [Planning Policies](#)
- [Recent Planning decisions and applications](#)

External:

- [Audit Wales](#)

30. Members will be provided with access to available corporate management information including those not listed above, unless there is a clear reason which prevents the Council or Cabinet from making such information available.
31. In cases when management information cannot be made available, Cardiff Council will specify why this information or matter is confidential, exempt from publication or from discussion in a public forum. Exempt information will include the description given in Schedule 12A of the Local Government Act 1972 although a further explanation may be provided if appropriate.

(In: Research Support and Services for Councillors Statutory Guidance Sec 3.14, p.3)

32. The HoDS will be responsible for ensuring that corporate management information that is made available to members is up-to-date, and that new and relevant information relating to currently approved and proposed Council policies and projects/programmes is made available.
33. Additionally, the details of key Council officers who have responsibility for the formulation and dissemination of corporate management information will also be made available from Democratic Services.

Access to public sector information resources and Open Data websites

34. Elected Members will be provided with a list of links to online public sector information resources as well as links to Open data sources, to enable easy access to information or data sets that could be relevant to supporting their role and work that they undertake for the Council.
35. A list of UK and Wales based information resources and Wales Public Sector data resources will be available on a Member Services intranet webpage and the main open data sources are attached as an Appendix to this document.

36. As and when required, Members may also be signposted by the Member's Enquiries Services (MES) team or by Democratic Services Officers to relevant websites or weblinks where they can initially undertake a tailored and self-directed search of the specific data sets and information needed.

Members' Access to Documents and Information relating to Council or Cabinet Business

37. In addition to the provisions of this Protocol:

- a) The Access to Information Procedure Rules, found within Part 4 of the Constitution [Access to Information Procedure Rules.pdf \(moderngov.co.uk\)](#), specifically Rules 17 and 18, set out Members' additional statutory rights of access to documents relating to Council and Cabinet business; and
- b) *The Protocol on Members' Rights of Access to Information and Documents, found within Part 5 of the Constitution: Protocol on Members Rights of Access to Informtion and Documents.pdf (moderngov.co.uk)*, clarify for Members what documents and information held by the Council they are entitled to see and how to request access to such information.

Access to specialist training – collection and interpretation of data

38. As specified in the Research Support and Services for Councillors Statutory Guidance (Sec 3.2 p.1), all Members will be offered some training support to enable them to effectively search and access information and data needed from selected Open data or benchmarking websites. Members can access specialist training with Data Cymru or similar organisations via a request to the HoDS. This training is intended to enhance Members' knowledge and skills to effectively search and use publicly available local government data resources.
39. The details of the specific courses on offer and the schedule of training will be communicated to all Members periodically by the Head of Democratic Services (HoDS) when opportunities arise or on request from the Democratic Services Committee to co-ordinate training for all members.

Supported Research.

Request for Secondary Data Research (Corporate)

40. All Members can request officer support to collect secondary data or information from Council Service Directorates. This is data or information that can be extracted from various datafiles or from existing corporately held documents i.e. how many children looked after are supported by the Council.

41. Members should request this type of information and research support using the Council's Member Enquiry System with a category of "Research". This enquiry will then be routed to the HoDS for action and enable all research requests to be recorded and managed.
42. To support the effective use of Democratic Services staff and resources as well as ensuring that any work already undertaken will not be duplicated, Members should confirm if any self-directed search of the data sets or information has been undertaken. Support can be provided by Democratic Services to assist with developing a research request and a checklist of the support available is provided at **Appendix B**
43. The Member Enquiry System will aim to deliver the data and information requested from the Councils service area directorates within 10 working days (two weeks) of submitting the request.

Request for Small Scale Secondary Data Research (existing external data)

44. Alternatively, Members can request officer support to undertake small-scale secondary research that involves the gathering and collation and/or summary of existing secondary data or information held by Cardiff Council and/or its public sector partners.
45. When logging a request for small-scale secondary research on the members enquiry system Members must provide details of the secondary data sets, information or documents that they require from the relevant Council Service Directorates and /or its relevant partners. This will ensure that Council officers dealing with the request have clarity on the type of information required, its scope, its presentation format and how the information will be used.
46. The following guidance should be used when requesting small scale secondary research or request for information:
 - What data, information or document is required?
 - How will this information be used? Note: The data or information requested cannot be used for political purposes or electoral campaign activities.
 - Scope / coverage of the data or information required, please specify the following:
 - Time scale – duration or the specific years covered.
 - Geographical coverage – the area that will be covered or included e.g. ward level, local authority level, Wales wide including comparable authorities.

- Demographic characteristics – age, sex, gender, employment, ethnicity, service user type etc.
- Other subject or topic limitations – what variables should it include and/or not include.
- Presentation format – how will data sets or information be presented?
- Date when data or the information is required.

47. Where more time will be required to provide the requested information or data sets, Members will be advised on the anticipated time frame for the delivery of data and information requested. Democratic Services or the service Directorate will also advise members via the MES team if data or information requested is not available or stored by the Council.

Request for small scale primary research support.

48. Support to undertake small scale and simple primary research can also be requested from the Democratic Services team using the Member Enquiry System. Primary research involves gathering data that has not been collected before which will require collecting the data or information directly from the source. The principal method of collecting this primary data would typically involve simple survey questionnaires circulated by Members to a limited number of their constituents.
49. Primary research for individual Members can only be used support their constituency work or as part of any other work undertaken for Cardiff Council. Members can be supported by Democratic Services to assist them to confirm the details of any of the information required for small-scale primary research (as set out below).
50. When requests for small scale primary research support are logged, Members will be required to provide as much detail as possible to assist the HoDS in understanding the planned scope and in determining the level of resources that may be required.
- a. All submitted request should include no more than 10 topic related questions not including a limited number of demographic monitoring questions. Selected monitoring questions relating to age, gender, employment, and ethnicity may be included in the survey as deemed relevant to analysis of the results.
 - b. As part of their request, Members are to include a list of the key questions that they would like to be included in the survey. These questions could be amended or refined to ensure that these meet the methodological requirements of effective survey design.

- c. The standard level of 50 hard copy versions of the survey questionnaires can be requested by each Member for each small-scale primary research topic. Where more than 50 hardcopy versions are needed, Members will need to include in their submission the reasons why a higher number of hardcopy questionnaires are required. The HoDS approval of requests for more than 50 hardcopy versions will be subject to availability of resources.
 - d. Knowledge of the risks relating to the conduct of the research and any issues that may arise should be declared as part of the request. This will assist Democratic Services in ensuring that risks are effectively managed and issues that may arise can be sufficiently dealt with.
 - e. Members must also confirm in writing that the findings of research supported or undertaken by Democratic Service on their behalf will only be used to support their work for the Council and will not be used for political purposes and/or electoral campaign activities.
 - f. On completion of data collection, Members will be supplied with a survey software (SNAP) generated summary of findings. Requests for additional and more complicated analysis (e.g. cross tabulations) and the formulation of more tailored survey reports and/or additional charts of survey finding will need to be logged as a new request on the MES Halo portal, with HoDS approval, subject to availability of resources.
 - g. Additional information and/supporting documentation may be requested by the HoDS in support of each submission to seek clarity on the scope and the level of resources that will be needed to support the work.
51. A checklist for developing a small-scale Primary Research request is provided at **Appendix C**.
 52. All submitted requests will be reviewed by the HoDS who will determine if the research requests can be supported. A written response to the submitted request will be provided within 10 working days of submission and the Member Enquiry will be closed.
 53. HoDS will have the overall responsibility for managing the demand for the small-scale primary research requests and for allocating resources to deliver the required outputs. It is not guaranteed that all submitted requests will be approved.
 54. Democratic Services will aim to deliver the outputs required within a 6–10-week period depending on available capacity and existing workload. Where multiple requests for support for this type of small-scale primary research are received,

the HoDS may need to prioritise demand and advise the commissioning Members on a feasible delivery schedule for outputs required.

Complex Primary Research

55. Democratic Services has a dedicated Principal Research Officer who can undertake more complex and rigorous research activities for the Council's Scrutiny Committees, the Democratic Services Committee, the Standards and Ethics Committee and any other Committees of the Council.
56. It is intended that this capacity will provide Members with rigorously collected and analysed new primary research and evidence that will enable Members to effectively review and scrutinise Council decisions and effectively engage with, and support, policy development.
57. Committee Chairs, with the support of the HoDS, can commission complex research to be undertaken to support work relating to their committees. Examples of different types of research that could be commissioned and undertaken may include the following:
 - **Examining Citizen or Service User Perspectives** – results from this type of research will identify or establish citizen priorities in a particular area or will assess the impact of an intervention on service users. This research may involve the use of quantitative methodologies such as a survey or qualitative methods such as in-depth interviews, focus groups or workshops.
 - **Reviewing 'Current Practice' and 'Good Practice'** – this type of research involves looking into the interventions and policies that have been adopted by other organisations and evaluating the solutions or practices that have been implemented. 'Current Practice' research specifically identifies "what works" and "what doesn't work" and may identify expertise in a particular area or field. 'Good Practice' research draws attention to 'what works' as well as highlighting those interventions that can be replicated locally. This research is particularly useful in identifying and gaining an understanding of the different variables that affect the success of a particular intervention or change. This will also provide useful insight into the different causes and strategies for change as well as problems encountered. Data can be collected from both primary and secondary sources, with the findings presented in a briefing report to Members. The review of current and good practice can also be used alongside performance 'benchmarking' research activities.

- **Assessing Impact** – This involves research that will examine the possible consequences or impact before or after the implementation of a particular policy or intervention on a specific group or population. The impact assessment can look at environmental, economic or social impacts or a combination of all three.
58. Request for specialist support from the Principal Research Officer can be accessed via the structured research Commissioning process - see attached **Research Commissioning** process shown at **Appendix 4**. Request for this type and level research of support should be raised with the relevant Committee and formally requested by the Committee Chairs and in dialogue with the HoDS.
 59. Through a structured research commissioning process, this dedicated research capacity will work with, assist and provide expert advice to Committee Chairs, Principal Scrutiny Officers and HoDS in focusing the research problem or topic area and evidence gaps.
 60. This research capacity will be responsible for the structured scoping out and design of the research project. This will involve the formulation of a detailed research project brief identifying the appropriate research approach and methodology to deliver the research outputs required within a predefined timescale.
 61. The schedule for delivery of this type of research will be determined following the completion of the full and comprehensive research project brief.
 62. The final research brief will be submitted for approval and signed off by key stakeholders including the HoDS, Committee Chairs, Principal Scrutiny Officer (PSO), and Service Area Directorate Managers who are involved in commissioning the research.
 63. Where there are conflicting resource demands for this capacity, the HoDS, in liaison with Committee Chairs, PSOs and other stakeholders, will decide on where specialist research capacity will be allocated and prioritise and schedule the delivery of any commissioned research projects.
 64. Capacity to undertake specialist research work may also be commissioned from the corporate research team or from external research providers if existing capacity is not available. This type of commissioning will have a financial and resource impact and will only be agreed if suitable funding can be identified.

Appendices

Appendix A: Member guide for Self-Directed Research

| Ser | Description | Response |
|-----|---|----------|
| a. | What data or type/s of information do I need? | |
| b. | Is the information available from the Council's website? | |
| c. | Is this information available from the Council's existing published documents e.g. corporate plan, performance reports, budget report, audit report or the Council document weblinks available on the intranet? | |
| d. | Is the data or information available from Data Cymru or other public sector web-based information resources and Open Data websites? | |

Note: Research findings cannot be used for political purposes or political or electoral campaign activities.

Appendix B: Initial Support for Developing a Research Request

The following support can be provided by Democratic Services Officers to Members to assist them in clarifying the details of their research request:

| Ser | Description |
|-----|--|
| a. | Assistance to determine the focus of the topic or subject of research. |
| b. | Clarifying the scope of the research and advice on limitations of the methodology, and legal and ethical considerations. |
| c. | Formulating a maximum of 10 methodologically sound questions relevant to the research topic. |
| d. | Preparation of an on-line survey questionnaire including a SNAP weblink and QR code or hardcopy printed version of questionnaire. <ul style="list-style-type: none">• Distribution of survey by post/hand delivered using the members correspondence or email.• return of responses• Inputting of completed hardcopy questionnaire into the survey software. |
| e. | Conduct of the research, reporting and dissemination of its findings. |
| f. | Provision of survey software generated summary or headline findings of the research results. |

Note: Research findings cannot be used for political purposes or political or electoral campaign activities.

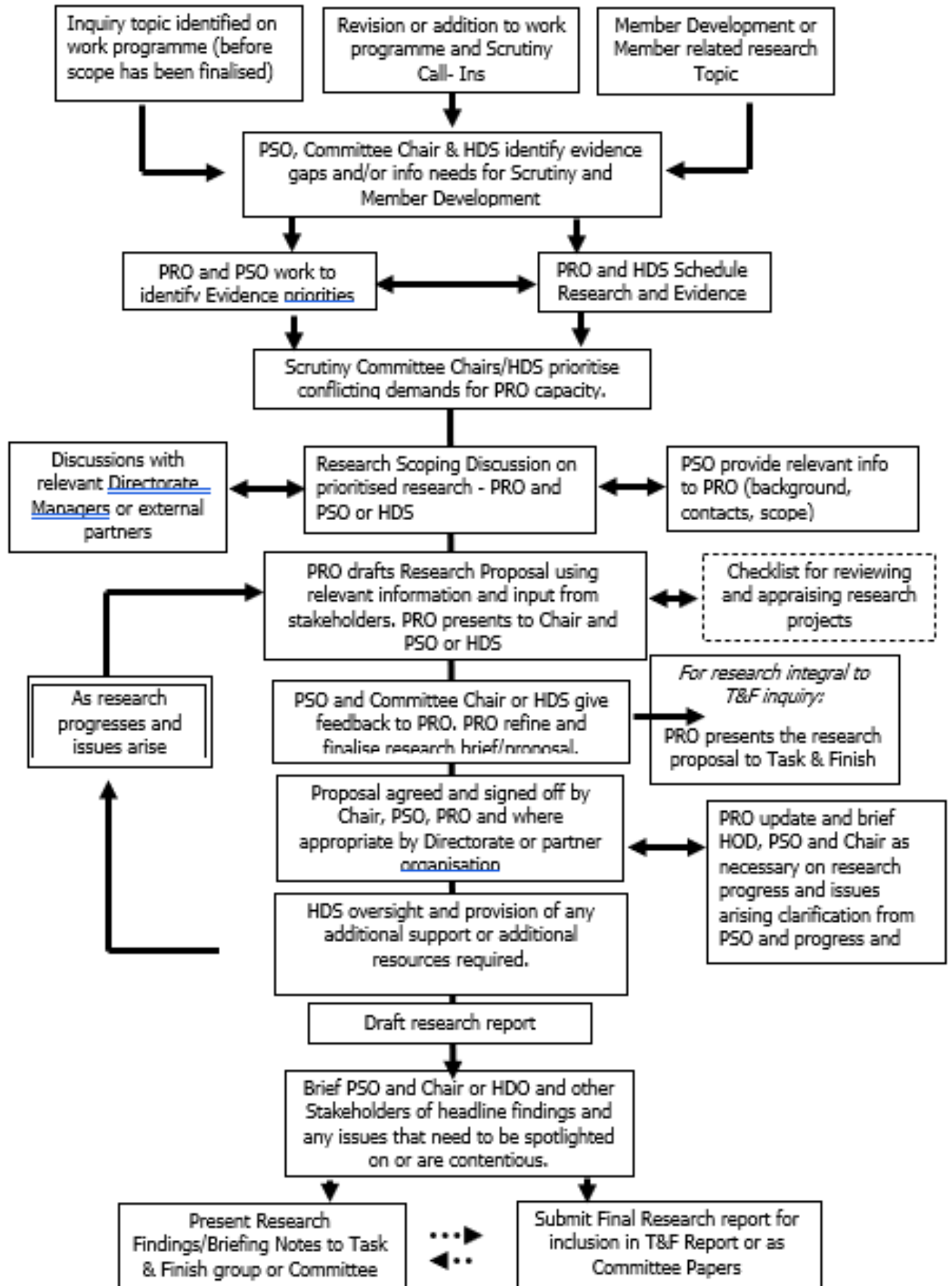
Appendix C: Checklist for Small Scale Primary Research

| Ser | Description | Response | X/✓ |
|-----------|---|----------|-----|
| 1. | <u>Research Problem or Topic</u> | | |
| a. | What do you want to find out? | | |
| b. | What is the subject or topic of investigation? | | |
| c. | What questions would you like to ask? | | |
| d. | Where available, please include a list of questions that could be included in the survey. | | |
| e. | What do you want to find out? | | |
| 2. | <u>Research Rationale and Use of Research Findings?</u> | | |
| a. | What is/are the reasons for undertaking this research? | | |
| b. | How will findings/information be used? | | |
| 3. | <u>Research Scope</u> | | |
| a. | What can be included or cannot be included as part of the subject area or topic of the research | | |
| b. | Who will be involved in the research? | | |
| c. | Who are the target respondents? | | |
| d. | What geographical area will be covered? – Ward area, Cardiff wide, Local authority level. | | |
| e. | What demographic characteristics should be included – age, sex, gender, employment, ethnicity, service user type etc. | | |
| 4. | <u>Potential risks and issues associated with research.</u> | | |
| a. | What risks or issues may arise when during the conduct – collection of data, reporting and dissemination - of the research process? | | |
| b. | How will these risks be managed? | | |
| 5. | <u>Total Number of Questions in Survey.</u> | | |

| Ser | Description | Response | X/✓ |
|-----------|---|----------|-----|
| a. | It is recommended that no more than 10 questions (excluding monitoring questions) will be included in short survey. | | |
| b. | If more than 10 questions should be included in the survey, please specify estimated total number and provide reasons why. | | |
| 6. | <u>Number of questionnaires required:</u> | | |
| a. | 50 possible respondents would be the normal level of questionnaire provided. | | |
| b. | If greater than 50 respondents are required, please specify total numbers and reasons for the higher level of respondents necessary for the research. | | |
| 7. | <u>Date when Summary Findings are required:</u> | | |
| a. | The date when findings can be made available will be no less than 60 days from when request for support has been approved by HOD | | |

Note: Research findings cannot be used for political purposes or political or electoral campaign activities.

Appendix D: Primary Research Commissioning Process



18

Mae'r dudalen hon yn wag yn fwriadol

REPORT OF THE HEAD OF DEMOCRATIC SERVICES

REVIEW OF THE ELECTED MEMBER LEARNING & DEVELOPMENT STRATEGY**Reason for this Report**

1. The purpose of this report is to enable the Democratic Services Committee to consider a draft of the revised Elected Member Learning & Development Strategy 2024-29 as attached at **Appendix A**.

Background

2. The role of a Councillor is complex and challenging and the political, legislative and local landscape in which they work is changing constantly. Communities have high expectations of their elected representatives from the day of their election throughout their period of office. Both new and experienced Councillors need appropriate support, information and professional development to undertake their complex and evolving roles.
3. An Elected Member Learning and Development Strategy sets out the approach that an Authority via its Democratic Services Committee takes regarding the development and support of its Elected Members.
4. The previous Elected Member Learning and Development Strategy was initially approved by Council on 28 March 2019 and a revised version which reflected changes to the arrangements for mandatory training was subsequently approved by Council on 30 November 2023, when it was also noted that a review of the Elected Member Learning and Development Strategy would be undertaken in 2024 and the revised strategy would be submitted to Council for approval.

IssuesReview of the Strategy

5. The Head of Democratic Services has carried out an initial desktop review the existing Elected Member Learning and Development Strategy. The following are the proposed changes to the strategy that have been identified:
 - a. Integrated the changes to the strategy approved by Council on 30 November 2023.

- b. Added Cabinet Members to the responsibilities section due to them being responsible for identifying the need for Member Briefings and to inform Members of changing or new policy arrangements.
 - c. Phase 1 – Administration
 - Revised the title to reflect the inclusion of an in-person introductory workshop to the administration phase.
 - Added a proposed timescale for Phase 1 (Week 1)
 - Removed references to the Cardiff Undertaking which is currently planned to be reviewed by the Standards and Ethics Committee but this could be restored following the review.
 - Added the requirement for ICT facilities and email addresses to be provided. Access to ICT facilities and email addresses will support subsequent phases of the strategy.
 - d. Phase 2 – The Essentials
 - Added a proposed timescale for Phase 2 (Week 1 – Week 4))
 - e. Phase 3 – The Core Functions
 - added a proposed timescale for Phase 3 (Week 4 – Week 26)
 - Added Appointments Committee which requires a recruitment and appointment session to be undertaken with Cardiff Academy before being able to sit as a member of the Committee.
 - Revised Audit Committee to Governance and Audit Committee.
 - Added “Required Training” for those committees which must attend the required training before being able to sit as a member of the committee.
 - added an expected outcome for All mandatory Training to be complete. This aligns to the requirements in the Members’ Code of Conduct for all mandatory training to be completed within 6 months.
 - f. Updated the allocation table for the WLGA Leadership Academy.
 - g. Updated Figure 1 to reflect the changes listed above.
 - h. Added paragraph for Online sessions and Conference Attendance to the methods of learning and development.
 - i. Revised the information for the Member development programme to include a provisional annual member development programme.
 - j. Updated the details for the review of the strategy.
 - k. Removed member role descriptions and Learning and Development Support for Community Councils from the Enhancing the current arrangements section.
5. A revised Elected Member Learning and Development Strategy is attached at **Appendix A**.

Next Steps

- 6. The Democratic Services Committee are requested to:

- a. Confirm that the proposed changes outlined in Paragraph 4 above are appropriate.
 - b. Identify any additional changes that should be made to the revised strategy.
7. Once the proposed changes have been agreed, a copy of the revised strategy will be shared with:
- a. Group Whips who will be able to seek the views of their groups and identify any additional changes that may be proposed by their group.
 - b. Senior Management Team to ensure that the proposed changes to the Strategy relating to the Directorates are deliverable.
8. The Head of Democratic will co-ordinate these consultation responses and liaise with all group whips to consider their views of the proposed changes made by other groups. The agreed changes will be included in the report presented to a subsequent meeting of the Democratic Services Committee.

Approval and Adoption

9. Following endorsement by the Democratic Services Committee the updated Learning and Development Strategy will be formatted and appropriate graphics and layouts will be added.
10. It is anticipated that the report from the Democratic Services Committee will be submitted to Council in September 2024 requesting approval and adoption of the revised Elected Member Learning and Development Strategy 2024-2029, in line with the Council decision of November 2023 (referenced in paragraph 4 above).
11. Following approval and adoption the Strategy will be translated into Welsh and uploaded to the Modern.gov Library and made publicly available on the internet.

Review of the Elected Member Learning and Development Strategy

12. To ensure that the Elected Member Learning and Development Strategy remains an effective tool for Elected Members increase their knowledge, it will be necessary to plan a review of the strategy. It is anticipated that the strategy will be reviewed in 2026, at the request of the Democratic Services Committee and in response to any relevant changes to legislation or to the Authority.

Financial Implications

13. There are no direct financial implications arising from this report. The updated Elected Member Learning and Development Strategy includes a section on 'Resources', which outlines how learning and development, in-house training and attendance at relevant conferences and events are to be resourced within existing budgets.

Legal Implications

14. Section 7 of the Local Government (Wales) Measure 2011 requires local authorities to secure the provision of reasonable training and development opportunities for its members. Each member must also be given the opportunity to have a review of their training and development needs on an annual basis. If a member decides to have an annual review of their training and development needs, the authority must ensure that the review includes an opportunity for an interview with someone who the authority considers to be “suitably qualified” to provide advice about the training and development needs of a member of a local authority.
15. In considering these requirements, regard must be had to the statutory guidance on Training, Development and Support for Local Authority Members, issued by the Welsh Ministers within Part 2 of the Statutory and Non-Statutory Guidance on Democracy within Principal Councils: [Statutory and non-statutory guidance on democracy within principal councils: members’ support, training and development \[HTML\] | GOV.WALES](#) . The guidance recommends that the Democratic Services Committee (DSC) has overall responsibility for deciding what should be regarded as reasonable training and development opportunities as part of its function of providing support to members to carry out their functions and provides a list of potential subjects for an on-going training programme. The statutory guidance also notes that ‘The agreed, training and development opportunities could be contained within a published development strategy which should include how the development will be provided and the process for commissioning external training and development. The Welsh Local Government Association’s Charter for Member Support and Development (“the Charter”) could be used for guidance purposes by local authorities in developing their strategies. Local authorities may wish to consider the requirements to achieve the Charter when developing their strategies and programmes.’
16. The Democratic Services Committee has responsibility for overseeing the support services provided to Members, ensuring they are adequately resourced and reporting any recommendations to Council.

RECOMMENDATIONS

17. The Democratic Services Committee is recommended to:
 - a. Note the report and the revised draft Elected Member Learning and Development Strategy at Appendix A.
 - b. Confirm that the proposed changes outlined in Paragraph 5 of the report are appropriate and identify any additional changes to the draft strategy.
 - c. Note the proposed arrangements for the consultation, approval and adoption of the Strategy.
 - d. Receive a further report on this matter in due course.

GP JONES
HEAD of DEMOCRATIC SERVICES
09 April 2024

Appendix A - Revised Draft Elected Member Learning and Development Strategy

Background Papers:

- [Revision of Elected Member Learning and Development Strategy](#) report to Council dated 30 November 2023.
- [Elected Member Learning and Development Strategy](#) report to Council dated 28 March 2019.
- [Elected Member Learning and Development Strategy](#) report to Democratic Services Committee dated 14 January 2019.

Mae'r dudalen hon yn wag yn fwriadol

Elected Member Learning and Development Strategy 2024 - 2029

DRAFT

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DRAFT

Foreword

To be added

Councillor John Lancaster
Chair of Democratic Services Committee
Date (TBC)

DRAFT

Expectations of the Elected Member Learning and Development Strategy

Elected Members are an integral part of setting the strategic aims and objectives of the Council. They also ensure that these objectives are met and that high-quality cost-effective services are delivered to the residents of Cardiff.

This Council is working to support the development of all of its Elected Members and to ensure that they are able meet the demands of their roles. Cardiff Council is committed to ensuring that:

- There is a planned and structured approach to Elected Member Learning and Development.
- Elected Members have access to appropriate means to assist them to acquire relevant knowledge and develop the skills necessary for their roles.
- Learning and development, wherever possible, is linked to the roles of Elected Members.
- Access to learning and development activities is equitable.
- Elected Members are encouraged to identify their own development needs and participate fully in learning and development activities.
- Elected Member learning and development activity is adequately resourced within available budgets.
- The Member Development Programme will be produced and updated on a regular basis, to support the Council's strategic plans, the roles and functions of Elected Members and key challenges affecting the Council's priorities.

Roles and Responsibilities for Elected Member Learning and Development

Full Council.

Approval of full Council will be sought for this Elected Member Learning and Development Strategy, including any substantive amendments or updates to it. Council will also consider recommendations from the Democratic Services Committee for member development topics to be approved as mandatory training.

Mandatory Member Development

The following topics have been approved by Council as “Mandatory Training”:

- What Councillors need to know including the Member’s Code of Conduct
- Information Governance and Data Protection
- Safeguarding
- Corporate Parenting
- Supporting Equality in Cardiff’s Diverse Communities

Any further member development topics recommended by the Democratic Services Committee as “Mandatory Training” are to be submitted to Council for approval.

A duty to attend all mandatory training is incorporated within the Members’ Code of Conduct, paragraph 8(c).

A failure to undertake any training designated by the Council as mandatory within 6 months from the date on which the mandatory training is first made available shall be a breach of the Members’ Code of Conduct, unless:

- (i) a Member can provide evidence of having attended equivalent and up to date training; or
- (ii) a Member has a reasonable excuse for requiring an extension of time,

which, in either case, should be agreed in advance with the Head of Democratic Services.

Democratic Services Committee

The Democratic Services Committee will:

- provide direction to the Head of Democratic Services when reviewing the development and support requirements of Elected Members.
- identify member learning and development opportunities for inclusion in the Member Development programme, the learning and development priorities and the adequacy of the Member Development budget.
- assist in the prioritisation of learning opportunities, the Democratic Services Committee has developed the following matrix to reflect the:
 - requirement to undertake a learning activity
 - likely knowledge and experience of some Elected Members

- importance and relevance of the learning activity.

| Requirement | Newly Elected Members | Experienced Members | Committee Members | Executive Members / Chairpersons/ Group Spokesperson |
|---|-----------------------|---------------------|-------------------|--|
| Legislative/Constitutional | Mandatory | Mandatory | Mandatory | Mandatory |
| Auditors, Inspectors & Regulators, Corporate Policy | Recommended | Recommended | Recommended | Recommended |
| Committee Specific | Beneficial | Useful | Recommended | Useful |
| Service Area/provision | Beneficial | Beneficial | Beneficial | Beneficial |
| Personal | Beneficial | Useful | Useful | Beneficial |
| Regional/National | Beneficial | Useful | Useful | Beneficial |

This matrix will be applied by the Head of Democratic Services who will then assess if topics should be delivered to all Elected Members or targeted for specific groups of Elected Members i.e. all scrutiny members or all of the Corporate Parenting Advisory Committee etc. The Head of Democratic Services will liaise with the Chairperson of the Democratic Services Committee regarding the categorisation and delivery of development topics as necessary.

The Democratic Services Committee will also consider any benefits which could be achieved by providing a tiered level of development. This would enable one level for those elected members with existing skills, knowledge or abilities and for a more detailed introduction for those members who are new to the topic.

The Head of Democratic Services

The role of the Head of Democratic Services is to:

- produce and monitor the Member Development Programme,
- collate any identified learning and development needs, and
- inform and plan the on-going Member Development Programme,
- Identify opportunities which support the wellbeing of Elected Members and enhance their personal resilience.

Political Leaders (supported by Party/Group Whips)

The responsibility of political leaders (Party/Groups Whips) is to:

- endorse the aims and intentions of the Elected Member Learning and Development Strategy.
- Promote participation in the Member Development Programme to enhance the knowledge and skills of individual members.
- Encourage group members to attend relevant training, in particular, any training designated as mandatory.
- Raise awareness of the support mechanisms available to improve the wellbeing and personal resilience of all of their Party/Group Members.
- Encourage all of their Party/Group Members to achieve their potential.

Cabinet Members

As portfolio holders Cabinet Members are able to identify the need for Member Briefings to inform Members of changing or new policy arrangements.

Directorates and Departments

Directorates and Departments are responsible for identifying and delivering service specific learning and development in co-ordination with the Head of Democratic Services and the Democratic Services Committee

Individual Members

Individual Members are responsible for:

- identifying their own development needs.
- seeking opportunities to improve their effectiveness and increase their potential.
- attending arranged learning and development activities.
- sharing their knowledge and skills with their peers.
- reviewing their learning and development activities.
- applying the knowledge and skills developed through the activities.
- undertaking all training designated by the Council as mandatory 'in line with their duties under the Members' Code of Conduct, paragraph 8(c)

Co-ordination

The day-to-day co-ordination of learning and development activities will be the responsibility of the Head of Democratic Services and the Democratic Services Team in liaison with representatives from the Council as necessary.

A Phased Approach

A systematic induction programme will be provided for all newly Elected Members. The initial induction and subsequent Member Development Programme will be delivered as part of a phased approach as shown in **Figure 1**.

Details of each phase of the strategy are as follows:

Phase 1 – Introductory Workshop and Administration (Week 1)

To establish the newly Elected Members within the Council and will include:

- An in-person introductory workshop including a range of service stands providing an overview of the work of the Authority.
- Fulfilling their statutory requirements regarding their Acceptance of Office and completing their Declaration of Personal Interests,
- The taking of official photographs for use on the Cardiff Council website and ID cards
- Authority for the use of personal information to set up remuneration payments, web pages and enable officers to carry out other necessary administrative functions.
- Provision of information for the creation of ICT accounts and selection of suitable ICT equipment.

Expected outcomes.

The following are the expected outcomes from this phase:

- All Acceptances of Office completed.

- Elected Member induction administration completed.
- ICT facilities and email addresses available for use

Phase 2 – The Essentials (Week 1 – Week 4)

To provide Elected Members with sufficient knowledge to prepare them to undertake their initial role in the support of Council business. This phase may include briefings on the following topics from key officers:

The Chief Executive:

- Overview of the Council its services and structures

Corporate Directors/Directors:

- An overview of the Directorate Policy and Service Provision – policy context, challenges and achievements

The Monitoring Officer:

- Introduction to Local Government
- Constitution and decision making
- Members Code of Conduct

Head of Democratic Services

- Roles of and appointment to committees
- Introduction to role descriptions
- The electronic meeting systems used at Council and Committee meetings.

Expected outcomes

The following are the expected outcomes from this phase:

- a. All Members have a basic knowledge of the Council, its structure and role.
- b. Code of Conduct completed by all Elected Members
- c. Elected Members are able to effectively undertake their governance and decision-making role at Council meetings.

Phase 3 – The Core Functions (Week 4 – Week 26)

To provide Elected Members with the knowledge and skills to enable them to undertake their core functions as Elected Members. It is intended to provide a sound basis for decision making which is required by councillors to carry out their role effectively.

- Ward and Casework (including the Member Enquiry System)
- Personal Resilience
- Corporate Parenting
- Safeguarding
- Equalities and Diversity
- Decision Making for Cabinet Members
- Developing effective decision making for those appointed to the following:
 - Appointments Committee (required training)
 - Constitution Committee
 - Corporate Parenting Advisory Committee
 - Council Appeals Committee
 - Democratic Services Committee

- Employment Conditions Committee
- Governance and Audit Committee (required training)
- Local Authority Governor Panel
- Pensions Committee
- Standards & Ethics Committee
- Licensing Committee (required training)
- Planning Committee (required training)
- Public Protection Committee (required training)
- Scrutiny Committees
- Representing constituents at meetings i.e. Licensing and Planning Committees
- Chairing Skills
- Questioning Skills
- Using social media and Handling online Abuse
- Managing difficult discussions

Expected outcomes.

The following are the expected outcomes from this phase:

- a. All Mandatory Training Completed
- b. Elected Members understand the roles to which they have been appointed.
- c. Elected Members are more able to carry their role in their wards and for the city.
- d. Elected Members have been offered a Member Mentor to assist in their development.

Phase 4 – Identifying the Needs of Individual Councillors (Ongoing)

With the possibility of a large number of new Elected Members after an election, it will be necessary to undertake a Personal Review process¹ as soon as possible. Learning, support and development needs will be identified at a number of levels which may include:

Personal Resilience and Wellbeing

All Elected Members will be informed of the personal support available to develop their personal resilience and ensure that their wellbeing is maintained throughout their time in office.

As an individual:

All Elected Members and in particular those who have been newly elected will have an opportunity to discuss their learning and development needs:

- with a suitable mentor¹ as part of their induction.
- as part of a peer review process where learning and development requirements can be identified.

Role Specific:

- Role descriptions will be used as an aid to identify development needs particularly during a review process.
- Members whose roles change will be supported to review their learning and development needs.

¹ See Enhancing the current arrangements for Elected Member Learning and Development Version 0.1 dated April 24

- The identification of learning and development needs at political group level be achieved in consultation with the Head of Democratic Services and through the feedback from the Democratic Services Committee.

Corporate and Constitutional:

Member Development will be linked to corporate and constitutional priorities by the Head of Democratic Services in liaison with the Chief Officers, Heads of Service and the Democratic Services Committee.

Regional and National Initiatives:

Requests are often received from regional bodies or national organisations to provide development opportunities on key issues. These events will be integrated into the Member Development Programme by the Head of Democratic Services but may be in addition to the usual learning and development activities.

Expected outcomes.

The following are the expected outcomes from this phase.

- a. Elected Members regularly identify their support and development needs.
- b. Elected Members are aware of their responsibilities when representing the Authority.

Phase 5 – Individual & Continuing Development (Ongoing)

To provide Elected Members with knowledge and skills related to:

- leading their community,
- developing those individual and specialist requirements identified within the personal review process,
- learning and development identified by the Democratic Services Committee.
- working with external partners.

Regional and National Development Opportunities

Opportunities may arise for regional development activities to be undertaken. This may include topics of common interest on a regional or national basis. These events may reduce costs and enhance outcomes due to the diversity of knowledge and experience of attendees, whilst also providing an opportunity for cross-council communication and collaboration.

The Leadership Programme

As part of the Academi Wales, the Welsh Government and the Welsh Local Government Association (WLGA) work in partnership with the Local Government Association (LGA) to deliver a Leadership Programme for Elected Members.

The Leadership Programme is a place where Elected Members, can explore the latest thinking in political leadership, and equip themselves with the knowledge and skills needed to meet the challenges that they face as councillors.

Initially authorities are offered 2 places. However, if every council does not take up its entitlement any unfilled places are made available for Authorities who have identified reserves. Attendance is capped at 3 – 4 councillors per authority per programme to

ensure that confidentiality in action learning sets is maintained and that the benefits of having representatives from a variety of Councils are not diminished.

Elected Members can request via their political group to attend the Leadership Programme as long as they have sufficient experience to actively participate. A process for the allocation of available spaces to the Leadership Programme for the current term of office has been agreed by political groups as follows:

| Year | Places | Allocation |
|---------|--------|--|
| 2024-25 | 2 | Labour x 1 Liberal Democrat x 1 |
| 2025-26 | 2 | Labour x 2 |
| 2026-27 | 2 | Labour x 1 Plaid/Green or Propel x 1 |
| 2027-28 | TBC | To be determined following 2027 Local Government Elections |
| 2028-29 | TBC | To be determined following 2027 Local Government Elections |

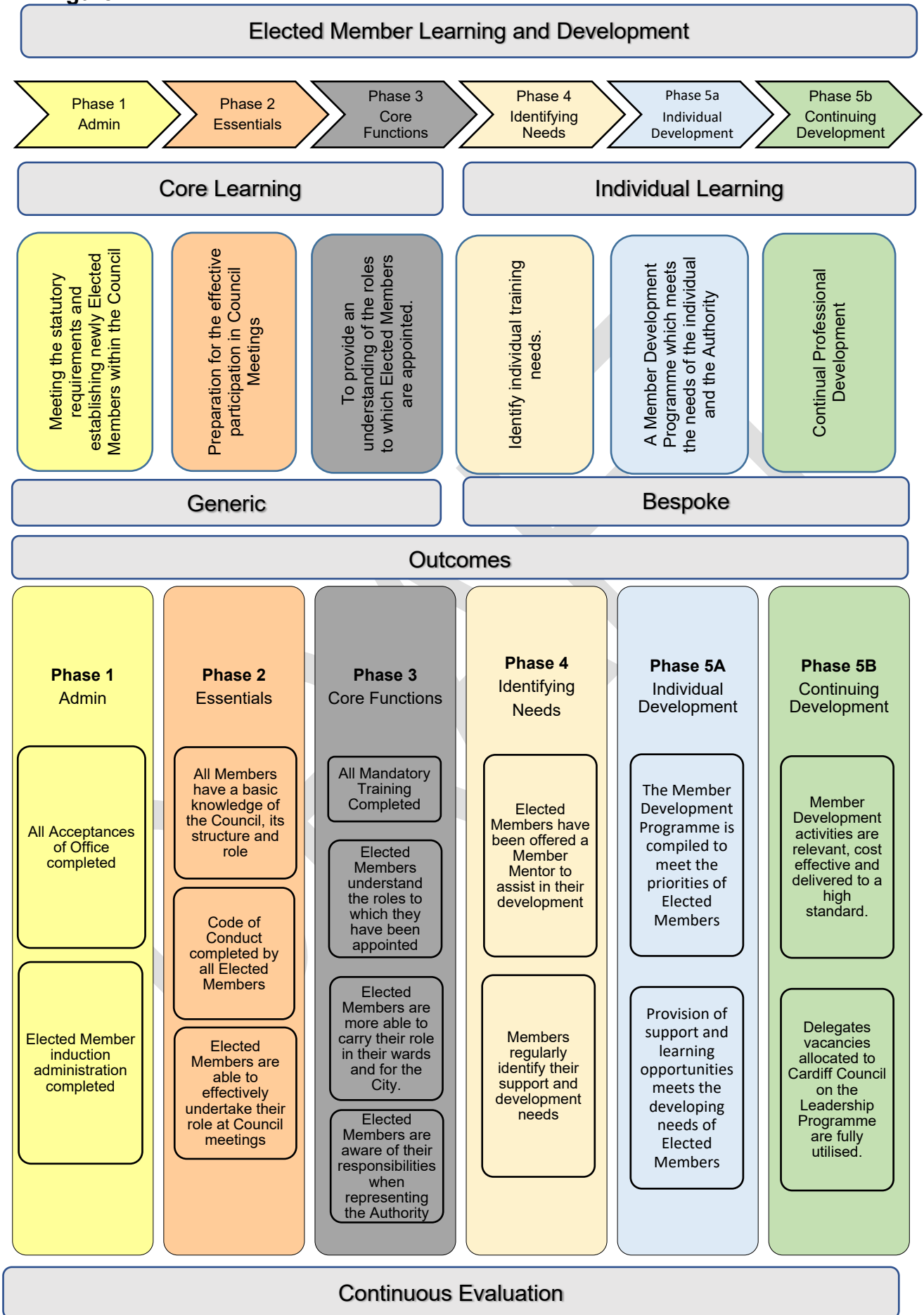
Should there be sufficient interest a bespoke Leadership Programme could be provided by the WLGA specifically for Cardiff councillors. It should be acknowledged that this option does have financial implications and does not provide the networking opportunities with other Local Authority Members which is regarded as a beneficial element of the Leadership programme.

Expected outcomes.

The following are the expected outcomes from this phase.

- a. The Member Development Programme is compiled to meet the priorities of Elected Members.
- b. Provision of support and learning opportunities meets the developing needs of Elected Members.
- c. Member Development activities are relevant, cost effective and delivered to a high standard.
- d. Delegate vacancies allocated to Cardiff Council on the Leadership Programme are fully utilised.

Figure 1



Member Development Activity Survey

Elected Members will be surveyed within the first 12 months following the Local Government Elections to help inform the number of topics, frequency and timings of development events that will be held. The survey will identify the most appropriate time to provide learning and development events to maximise participation. This survey will be repeated at the mid-point of a term of office or when requested to do so by the Democratic Services Committee.

Prioritisation of Member Development activities

All requests to provide learning and development opportunities for Elected Members should include the following key information to assist when prioritising the delivery of Member Development activities:

- The subject of the learning activity.
- A brief outline description of the subject.
- The requirement/justification to undertake this learning, i.e., is there a statutory requirement, is it part of an on-going initiative?
- Who forms the target audience, i.e. All Members, Scrutiny Members etc.?
- What are the expected/desired learning outcome/objectives?
- Which officers/organisations will be delivering/facilitating this event?
- What is the anticipated duration of the session?
- What type of training activity is suggested i.e., 1 hour presentation with questions, 30-minute briefing, 90 minute interactive workshop etc.?
- How will this activity be evaluated to show that the anticipated benefits have been achieved?

The Head of Democratic Services will assess all requests and recommend to the Democratic Services Committee how these requests should be prioritised, categorised and if necessary tiered for inclusion in the Member Development Programme. Any designation of training as mandatory will be set out within this Strategy and is subject to the approval of full Council.

Methods of learning and development

A flexible approach to the delivery of learning and development opportunities will be adopted to meet the identified needs of individuals and groups.

Face-To-Face Activities

A variety of methods may be used to deliver these opportunities which could include seminars, workshops, E-Learning and briefing sessions. Where appropriate, shared Member and officer development activities will be encouraged.

Online sessions

The ability to deliver online briefings or training sessions has improved in recent years and this type of session enable increased levels of attendance particularly for those with caring and professional commitments. Many of these sessions may be recorded and subsequently viewed by those unable to attend.

E-Learning

The Cardiff Academy Website is an online portal where suitable development opportunities are provided for Officers and Elected members.

Greater use of the E-Learning facilities will be incorporated into the Member Development Programme and this will enable:

- Key E-Learning modules can be identified by the Democratic Services Committee and included as part of an Elected Member Induction.
- Key topics to be identified for inclusion in the Member Development programme and categorised by the Democratic Services Committee accordingly. Elected Members may be requested to complete the specific E-Learning modules by a particular date. A weekly report will be provided to the Head of Democratic Services by Cardiff Academy to identify any E-Learning modules have been completed.
- Those returning councillors or those who have previously attended face to face training on topics such as Corporate Parenting will be able to undertake the E-Learning module rather than attending an annual repeat of any face-to-face refresher sessions.
- Elected Members to undertake other E-Learning activities for their own development which will be shown on their training records.

Assistance can be provided by the Democratic Services Team to enable Elected Members to access these learning activities and ensure that development records are maintained.

Conference Attendance

Members are often invited to conferences on a range of topics. Should a member wish to attend a conference, they are to complete a conference attendance form and submit it to the Head of Democratic Services for approval. Costs of Conferences are usually high and funding is limited. Funding for attending conferences cannot be guaranteed.

With the introduction of remote working many conferences have moved online and these are often more cost effective.

WLGA Workbooks

The WLGA have designed a series of Elected Members workbooks which can be used as an introduction or a refresher for key knowledge. They cover a broad range of generic skills as well as specific issues and service and or policy areas and their impact at ward level. The workbooks currently available are:

- The Effective 'Ward' Councillor
- Handling Casework
- Influencing Skills
- Facilitation and Conflict Resolution
- Stress Management and Personal Resilience

- Safeguarding Adults
- Child Sexual Exploitation
- Scrutiny of Finance
- Corporate Parenting
- Health and Safety in the Council
- Making Sustainable Decisions
- Presentations from regional training sessions for Elected Members on their responsibilities towards Gypsies and Travelers

Member Development Programme

It will be the responsibility of the Head of Democratic Services to prepare the Member Development Programme in line with the priorities determined by the Democratic Services Committee. This will initially be a provisional annual programme but will be confirmed by a rolling programme that will confirm the activities for the next three months with topics for the subsequent 3 months being identified but not confirmed. This will allow the programme to be flexible and adapt to the changing needs and priorities of Elected Members and the Council.

If time dependant learning opportunities arise and there is no meeting of the Democratic Services Committee planned before the delivery of the event the Chairperson of the Democratic Services Committee in liaison with the Head of Democratic Services will update the Member Development Programme as necessary.

Access to learning and development opportunities.

All Elected Members will have equal access and opportunity to:

- information relating to learning and development opportunities.
- participate in learning and development opportunities, taking into account the needs of their roles and responsibilities and their personal learning needs.
- benefit from learning and development activities, regardless of ability, race, colour, national ethnic or social origin, gender, sexuality, sexual orientation, religion, age, disability, political or other personal beliefs.

Attendance at Member Development Activities

The Member Development Programme will be approved by the Democratic Services Committee and included in the Member Information and Diary of Meetings email circulated by Democratic Services.

Electronic invitations for Member Development activities will be placed in individual Elected Members electronic calendars. Elected Members will be requested to respond electronically if they are unable to attend the activity. It is vital that these responses are accurate as the facilitators of the events are provided with the anticipated attendance numbers to tailor their delivery of the session. The attendance of Elected Members at these Member Development Activities will be displayed on the Elected Members profile page on the Cardiff Council website.

At each session the attendance will be recorded by Democratic Services. A summary of attendance at training events will be compiled and circulated to Group Whips on a regular basis to promote and encourage the attendance of their members. Group Leaders will be provided with training attendance records for the members of their groups for the purposes of their annual report to the Standards & Ethics Committee,

which will include specific reference to attendance figures for all mandatory training and any steps being taken to address any non-attendance.

Learning and development records

Democratic Services will collate and record information relating to Elected Member learning and development including attendance and the evaluation of activities which have been completed. The evaluation will also enable Elected Members to identify and record any additional learning needs which arise from a completed learning activity.

Resources

Elected Member learning and development, will be resourced from the allocated Member Development budget. Reasonable allocation will be made as part of the annual budget round and applied with regard to the corporate needs of the Authority. The Democratic Services Committee will monitor appropriate spend on the budget.

In house training will be provided by Directorates if the topic relates to their service areas. The costs for this type of event will be met from Directorate budgets and not from the Member Development budget.

The Democratic Services Team will be responsible for the co-ordination and support for Elected Members attending relevant conferences and events within its allocated resources. The Team will also coordinate the reimbursement of travel and out of county subsistence allowances.

Evaluation

It is the responsibility of the Head of Democratic Services to ensure that the evaluation of learning and development activities is carried out.

Evaluation of Individual Activities

All training providers will be required to incorporate an evaluation of the event into their learning session and Elected Members will be asked to complete a learning and development evaluation form. Elected Members are recommended to compile learning logs to support any self-assessment or review of their development requirements.

Evaluation forms will be analysed, and the feedback collated into a report which will be presented to the Democratic Services Committee on a regular basis. This will enable the Democratic Services Committee to evaluate the effectiveness of the Member Development Programme and ensure that the identified outcomes are achieved.

Evaluation of Facilitators

To ensure that any learning and development activity provided to Elected Members is delivered to the highest standards and that the aims and objectives of the event are met, it is intended that an internal subject matter expert or the Head of Democratic Services attend each learning event and evaluate the provider/facilitator. This will be essential for events delivered by external providers to ensure that value for money has been achieved and that an effective learning opportunity has been provided and achieves the planned outcomes.

Review of the Elected Member Learning and Development Strategy

To ensure that the Elected Member Learning and Development Strategy remains an effective tool for Elected Members increase their knowledge. It will be necessary to plan a review the strategy. It is anticipated that the strategy will be reviewed in 2026, at the request of the Democratic Services Committee and in response to relevant changes to legislation or to the Authority.

Enhancing the current arrangements for Elected Member Learning and Development

The following topics are planned to be developed during the duration of this strategy:

- **Mentoring:**

The formal mentoring of Elected Members by experienced Members is strongly recommended and it is planned to be offered to all newly Elected Members. This will enable the mentee to develop the skills, knowledge, understanding and behaviours required for the Elected Member role. This is not a prescriptive or directive relationship but one which allows the mentee to find their own way, guided by the mentor.

Guidance for Member Mentors has been developed by the Welsh Local Government Association (WLGA). It is anticipated that experienced Elected Members identified by Political Groups will participate in a workshop facilitated by the WLGA to those undertaking a mentoring role. This will provide the appropriate level of support for newly elected to rapidly develop the necessary skills to become an effective Elected Member.

Returning Members who do not require mentoring will be provided with the opportunity to discuss their development needs as part of the Personal Review process. This process is to be developed but it is anticipated that it will enable Senior Elected Member Peers to be able to assist other Elected Members to identify their learning needs.

- **Personal Review Process**

The key requirements of a Personal Review process are identified in the Local Government (Wales) Measure 2011:

- A local authority must make available to each member of the authority an annual review of the member's training and development needs.
- The review must include an opportunity "to discuss" with a person who is, in the opinion of the authority, suitably qualified to provide advice regarding the training and development needs of a member of a local authority.

Establishment and effective use of the Personal Review process will enable this Authority to meet its requirement in accordance with the Measure and secure the provision of reasonable learning and development opportunities for its Elected Members.

The use of learning logs to record any development activities that have been attended will provide an opportunity to reflect on the event at a later date. These will also assist in the production of an Annual Report and support Personal Review discussions.

- **Learning and Development Support for Community Councils**
With the introduction of a Community Councils Charter opportunities to identify appropriate common learning and development activities will be investigated although Community Councils may be asked to contribute to the cost.

DRAFT

Mae'r dudalen hon yn wag yn fwriadol

REPORT OF THE HEAD OF DEMOCRATIC SERVICES

DEMOCRATIC SERVICES – ACTIVITIES & SERVICE SUPPORT**Reason for this Report**

1. The purpose of this report is to inform the Democratic Services Committee on the performance of the Council's Democratic Services since the last meeting on 5 February 2024.

BackgroundRole of the Democratic Services Committee

2. The Local Government (Wales) Measure 2011, Part 1, Chapter 2, <https://www.legislation.gov.uk/mwa/2011/4/part/1/chapter/2> requires local authorities to appoint a Democratic Services Committee to oversee the Democratic Services functions of the Council, ensure that the work is adequately resourced and report to the full Council accordingly. The Democratic Services functions include Members' Services, Committee Services and Scrutiny Services, but not Cabinet Support Services.

IssuesStaffing Arrangements

3. Following approval of the Budget for 2024 – 25, plans are being put in place for the transfer of the Protocol Office and the support for the Lord Mayor to Democratic Services. The committee will be updated on the finalised arrangements for this transfer at its next meeting.

Behaviours Survey 2024

4. At its meeting on 5 February 2024 the Democratic Services Committee was advised of the intention to undertake a Behaviours survey with all Members in March 2024. The survey progressed as intended and 59 (63.3%) responses were received from Elected, Independent and Co-opted Members.
5. The team is now working to provide the analysis and an outcome report for the Standards & Ethics Committee.

Member Development

6. The following are the member development activities undertaken since the last meeting of the committee:

| Serial | Date | Topic | Numbers Attended | Total % Attended |
|--------|-----------|---------------------------------------|------------------|------------------|
| 1. | 01-Feb-24 | Major Projects - Finance and Delivery | 10 | 25.32% |
| 2. | 21-Feb-24 | Introduction to Special Procedures | 12 | 12.66% |
| 3. | 22-Feb-24 | Schools Admission and Appeals | 13 | 14.46% |
| 4. | 29-Feb-24 | SE Wales Corporate Joint Committee | 1 | 16.46% |
| 5. | 06-Mar-24 | Equality for Recruitment | 3 | 100.00% |
| 6. | 06-Mar-24 | Data 101 | 4 | 100.00% |

Planned Learning:

7. The following learning and development topics were agreed for delivery at previous Committee meetings and work is ongoing to schedule these activities.

a. Age Friendly Cardiff Awareness Sessions

Cardiff became the first Local Authority to be accepted by the World Health Organisation (WHO) as members of the Global Network for Age Friendly Cities and Communities in March 2022. The ambition of a Cardiff is to be a great place to grow older. This session will describe the good work that has been undertaken and to enable Elected Members to share age friendly information with their communities.

b. Biodiversity and Natural Resources

This “beneficial” session was identified from a scrutiny recommendation and initial discussions with the Head of Planning to support the use of external facilitators Natural Resources Wales and Wildlife Trust to support the wider requirements of this topic.

Delivery of this topic has been deferred due to prioritisation of the consultation for the latest phase of the RLDP and will be scheduled as soon as practicably possible.

c. Social Housing and Section 106

This “beneficial” session relating to Section 106 of the Town and Country Planning Act 1990 allows a local planning authority, to enter into a legally binding agreement or planning obligation with a landowner as part of the granting of planning permission. These agreements are used for new developments, and they usually would be the preferred method to secure affordable housing at the site.

Delivery of this topic has been deferred due to prioritisation of the consultation for the latest phase of the RLDP and will be scheduled as soon as practicably possible.

d. Media and Social Media skills

A “beneficial” training package which will provide Elected Members with the opportunity to improve their skills and confidence when engaging with the media and on social media.

Future Training

8. The following topic has been identified as a future training opportunity:

a. One Planet Cardiff, Carbon Literacy for members:

Carbon Literacy is a nationally and internationally recognised standard (recognised as such by the UN at COP21, in Paris, where it was awarded as a TAP100, one of 100 worldwide Transformative Action Programs) that promotes: *“An awareness of the carbon costs and impacts of everyday activities, and the ability and motivation to reduce emissions, on an individual, community and organisational basis.”*

The structure and format of carbon literacy:

- Provides qualified scientific evidence
- Answers common questions and dispels myths
- Focuses participants on where and how they can support/make change
- Provides the knowledge and skills to support carbon aware decision making at all levels.

Cardiff Council achieved carbon literate status in 2021 (the first local Authority in Wales to do so) and is now part of over 7000 organisations across 26 countries providing quality and quantifiable climate awareness training for staff. The council currently has over 60 staff and 3 members trained.

This was achieved by using the Local Authorities Carbon Literacy Toolkit, which was funded by the Department for Business, Energy and Industrial Strategy (BEIS) (Now Department for Energy Security & Net Zero – DESNZ), involving contribution and donation of materials and testing and piloting by 13 different local authorities across England and Wales, including here at Cardiff.

To cover the topics and meet the training standard involves one full day (8 hours/two half days). This are delivered by in-house qualified trainers. During 2024/5 we will be increasing carbon literacy training across the council with the ambition of increasing the number of carbon literate staff to ensure carbon considerations are incorporated more into the council’s decision making at all levels. Further information: [The Carbon Literacy Project](#)

These training opportunities are planned to be extended to elected members and feedback from members is requested regarding the following options:

- The provision of a 90 minute Carbon Literacy introductory session
- The delivery of either 2 x half days sessions or a whole day course format in early summer & again early autumn 2024
- Preferred days of the week for the delivery of these session

Following member feedback an initial program for these Carbon Literacy sessions will be developed.

Developing the Members Intranet Page

9. As outlined in the Member Protocol For Accessing Research Support And Information report, work is being planned for the development of the Members Intranet Page. Currently, the existing page contains minimal information but needs to be updated with information that would benefit Members.
10. A new page has been created providing opportunities to improve the layout and content of this webpage. Once fully developed the page could include:
 - a. A calendar of Member activities.
 - b. Latest corporate news and updates.
 - c. Research information and links to relevant data sources.
 - d. Links to the Member Enquiries Portal.
 - e. Member Development presentations and videos.
 - f. Links to Policy and Guidance documents
 - g. Links to forms i.e. Remuneration claim forms.
11. Some changes to this webpage may alter the circulation of information to Members including the weekly diary email. This webpage could also be set as the “home page” for Members when they access the intranet.
12. The committee is requested to consider the options listed above for inclusion on the improved Members Intranet webpage and identify any other information which would be beneficial to Members and could be included on the intranet site.

Financial Implications

13. Any costs from Democratic Services activities and services support are to be monitored and contained within the respective funding sources and budgets.

Legal Implications

14. Under the Local Government (Wales) Measure 2011, Part 1, the Democratic Services Committee is responsible for overseeing the democratic services functions of the Council, ensuring this work is adequately resourced; and reporting to full Council accordingly.
15. The Democratic Services functions (which must be discharged by the Head of Democratic Services) are defined as follows:
 - a. to provide support and advice: to the authority in relation to its meetings; to committees of the authority and the members of those committees; to any joint committee which a local authority is responsible for organising and the members of that committee; in relation to the functions of the authority's scrutiny committees, to members of the

authority, members of the executive and officers; to each member of the authority in carrying out the role of member of the authority (but excluding a member's role as an Executive member);

- b. to promote the role of the authority's Scrutiny Committees;
 - c. to make reports and recommendations to Council in respect of the number and grades of staff required to discharge democratic services functions and the appointment, organisation and proper management of those staff; and
 - d. any other functions prescribed by the Welsh Ministers.
16. In determining how to exercise its functions, the Committee must have regard to the statutory guidance issued by the Welsh Ministers: [Statutory and non-statutory guidance on democracy within principal councils: governance and scrutiny \[HTML\] | GOV.WALES](#), which is incorporated within the consolidated guidance on democracy within principal councils published in July 2023.
17. The information set out in the body of this report enables the Democratic Services Committee to oversee the work of democratic services, ensure the work is adequately resourced and report to full Council, as appropriate.

RECOMMENDATION

The Democratic Services Committee is requested to:

- a. note the information set out in the report.
- b. provide their views in respect of any requirements for future training and the improvement of the Members Intranet website.

GARY JONES
HEAD of DEMOCRATIC SERVICES
09 April 2024

Background Papers:

[Budget Proposals 2024 - 2025](#) report to Council dated 7 March 2024.

[Member Surveys 2024](#) report to Democratic Services Committee dated 5 February 2024.

Mae'r dudalen hon yn wag yn fwriadol

REPORT OF THE HEAD OF DEMOCRATIC SERVICES

FORWARD WORK PROGRAMME

Reason for this Report

1. The purpose of this report is to propose topics for inclusion on the Democratic Services Committee Forward Work Programme.

Background

2. The Local Government (Wales) Measure 2011, Part 1, Chapter 2, requires local authorities to appoint a Democratic Services Committee to oversee the Democratic Services functions of the Council, ensure that the work is adequately resourced and report to the full Council accordingly.
3. The Forward Work Plan gives notice of, and transparency to, matters under review and for decision during the municipal year and reflects the Committees Terms of Reference as set out in the Legal implications of this report.
4. The Forward Work Plan needs to reflect the time commitment required for Committee Members and the resources available within the Council to meet the Committee's ambitions.

Issues

5. The main work streams of the Committee are to provide the framework to support Democratic Services functions and the work of Elected Members, as well as supporting Elected Members with learning opportunities in their specific roles within the Council and for their personal development.
6. The proposed business items for consideration at meetings of the Democratic Services Committee are shown at **Appendix A**.
7. The Committee is requested to consider the draft work programme and advise the Head of Democratic Services of any changes required to the programme. The Committee is also requested to consider if they wish to invite any persons to attend its meetings to support the items identified.

Financial Implications

8. There are no financial implications directly arising from this report. In the implementation and delivery of the Democratic Services Committee Forward Work

Programme any costs will need to be identified and found within existing financial resources.

Legal Implications

9. The terms of reference for the Democratic Services Committee are:
 - a) To carry out the local authority's function of designating the Head of Democratic Services.
 - b) To keep under review the adequacy of provision of staff, accommodation and other resources made available to discharge the democratic services functions of the Authority.
 - c) To make reports, at least annually, to the full Council in relation to these matters.
10. The Democratic Services functions (which must be discharged by the Head of Democratic Services) are defined (in section 9 of the Local Government (Wales) Measure 2011) as follows:
 - a. to provide support and advice: to the authority in relation to its meetings; to committees of the authority and the members of those committees; to any joint committee which a local authority is responsible for organising and the members of that committee; in relation to the functions of the authority's scrutiny committees, to members of the authority, members of the executive and officers; to each member of the authority in carrying out the role of member of the authority (but excluding a member's role as an Executive member);
 - b. to promote the role of the authority's Scrutiny Committees;
 - c. to make reports and recommendations to Council in respect of the number and grades of staff required to discharge democratic services functions and the appointment, organisation and proper management of those staff; and
 - d. any other functions prescribed by the Welsh Ministers.
11. In considering its Work Programme, the Committee should have regard to its terms of reference, the Welsh Government's Statutory Guidance for Democratic Services Committees: [Statutory and non-statutory guidance on democracy within principal councils: governance and scrutiny \[HTML\] | GOV.WALES](#) (in Part 4) and available resources.

RECOMMENDATION

12. It is recommended that the Democratic Services Committee considers the proposed Work Programme appended as **Appendix A** to this report; identifies any additional topics for consideration at future meetings of the committee; and approves its Work Programme.

GP JONES
HEAD OF DEMOCRATIC SERVICES

9 April 2024

APPENDIX A - Proposed Work Programme

Background Papers:

Welsh Government's Statutory Guidance for Democratic Services Committees: [Statutory and non-statutory guidance on democracy within principal councils: governance and scrutiny \[HTML\] | GOV.WALES](#) (in Part 4)

Mae'r dudalen hon yn wag yn fwriadol

PROPOSED WORK PROGRAMME 2024-2025

Tudalen 73

| Meeting date | Item | Aim | Additional Invitees |
|---------------|--|--|----------------------------|
| (TBC) July | Member Protocol For Accessing Information And Research Support | To receive for consideration a final draft of the research protocol | Principal Research Officer |
| (TBC) July | The Annual Review Process | To provide an updated process for Elected Members who wish to have an Annual Review for their personal Development | |
| (TBC) July | Revised Member Learning and Development Strategy | To consider the final draft of the Strategy for recommendation to Council for approval | |
| (TBC) July | Democratic Services – Activities & Service Support | To receive an update on the performance and services provided by Democratic Services | |
| (TBC) July | Forward Work Programme | To receive a report proposing items for consideration at a subsequent meeting of the Democratic Services Committee | |

| Meeting date | Item | Aim | Additional Invitees |
|-------------------|--|--|---------------------|
| (TBC) November | Member's ICT Protocol | To receive an update of the Members ICT Protocol which will identify the relevant processes and procedures for Elected Members when using the Council's and other ICT facilities | Head of ICT |
| (TBC) November | The Annual Review Process – Update report | To provide an updated process for Elected Members who wish to have an Annual Review for their personal Development | |
| (TBC) November | Democratic Services – Activities & Service Support | To receive an update on the performance and services provided by Democratic Services | |
| (TBC) November | Forward Work Programme | To receive a report proposing items for consideration at a subsequent meeting of the Democratic Services Committee | |

| Meeting date | Item | Aim | Additional Invitees |
|---------------------|--|--|---------------------|
| (TBC) January 25 | Democratic Services Committee Annual Report 2024. | To enable the committee to consider its proposed Annual Report for 2024 | |
| (TBC) January 25 | Democratic Services – Activities & Service Support | To receive an update on the performance and services provided by Democratic Services | |
| (TBC) January 25 | Forward Work Programme | To receive a report proposing items for consideration at a subsequent meeting of the Democratic Services Committee | |

Mae'r dudalen hon yn wag yn fwriadol