

The Wales Charter for Member Support and Development

The Criteria and Assessment Process





What is the Charter?



The role of the Councillor is increasingly challenging. Throughout Wales, Councils are striving to provide the best possible support for their members to enable them to meet these challenges. This takes the form of skill and knowledge development, support facilities, and support services.

The Welsh Local Government Association has a long history of working with Councils to help them develop these activities. To provide structure to the national programme of support, the *Wales Charter for Member Support and Development* was developed collaboratively by the Association, Councillors representing each of the political groups and Democratic Services officers from each Council.

The Charter aims to provide a broad framework for local planning, self-assessment, action and review together with networking and comparison amongst Councils and the sharing of good and innovative practice. Its wide adoption has raised the overall amount and standard of support given to Councillors in Wales.

The Charter reflects the legislative requirements for corporate governance and Councillor support and development set out in the Local Government (Wales) Measure 2011.

The Charter criteria will be reviewed in 2023 to take account of the requirements of the Local Government and Elections (Wales) Act 2021 and the associated WG guidance as it becomes available.

A list of authorities and their award status is available on the WLGA website

The Assessment Process

Councils should apply for the Charter followed by the Advanced Charter. These awards need to be renewed every three years.

Assessment for the **Charter** is a self-assessment undertaken by the council and submitted to the WLGA who review the submission and make the award. The Charter is designed to establish that an essential range of support and development arrangements are **in place**. To make a submission, authorities should complete the self-assessment pro-forma at appendix 1 in this document and send this to the WLGA electronically together with the supporting evidence.

Assessment for the **Advanced Charter** is a peer assessment undertaken by officers, and member peers. The Advanced Charter is designed to recognise that the arrangements required for the Charter are **working effectively**. To make a submission, councils should contact the WLGA to agree timescales and complete the submission pro-forma at appendix 2 in this document and send this to the WLGA electronically together with the supporting evidence. The WLGA will arrange a virtual peer assessment meeting following the submission, where officers and members of the council will have an opportunity to discuss approaches and experiences with the review team.

Reassessments at both Charter and Advanced Charter level are assessed through written submission only.



The Good Practice and Innovation Award for Member Support and Development

This award seeks to recognise and share excellent or innovative practice in councillor support and development to improve practice in Wales.

Criteria for the Award

The award recognises excellent or innovative practice in an **aspect of** councillor support or development which has **demonstrably improved** the outcomes for members or the authority. This practice should be **over and above** that required for the advanced level of the Charter or outside the scope of that award. In some cases, practice will be identified through applications for Charter status, in others, through separate application.

Applications for the Good Practice and Innovation AwardShould include:

- 1. A short written description of the activity, including:
- What is being done
- How it is being done including how councillors have been engaged in the process
- Why it was introduced links to personal or organisational development or the needs expressed by councillors for support.
- **2.** A description of the impact on or outcomes for councillors as a result of the activity. This should include quantifiable results and qualitative evidence from the authority and councillors.
- 3. Evidence for (2) above

Assessment

The Good Practice and Innovation Award will be assessed based on a review of a written submission by a WLGA peer panel.

Practice exchange

On receipt of the award, the council will be invited to make a presentation to the national officer and councillor networks The submission will also be included on the WLGA website.

Self-assessment frameworks are appended to this document.

Please inform the WLGA of your intention to apply by contacting: lmprovement@wlga.gov.uk; Gwelliant@wlga.gov.uk



The Member Support & Development Charter Standard and Advanced Level Criteria

A. Member Roles and Responsibilities	Charter Requirement	Charter Expansion and Clarification	Advanced Charter Requirements	Advanced Charter Expansion and Clarification
1. Members are supported with role descriptions.	Role descriptions are adopted for the: Leader Deputy Leader Cabinet Members Scrutiny members Scrutiny Chairs Scrutiny Co-optees Chairs of statutory committees Chairs of area committees Chair of the Audit Committee Members of Audit Committee Members of Democratic Services Member of Democratic Services Ward Member, including community leadership and case work Chair of Standards committee Member of Standards committee Member of Standards Committee	What does adopted mean? Role descriptions exist and have been formally adopted for all the roles listed. There is no need at this level for members to evidence that they perform the roles outlined in the descriptions but they should understand what their role is and what is expected of them. What can be defined as a role description? See • the WLGA model role descriptions for Welsh Authorities and • the WLGA document The Role of Councillors in Collaboration and • The Model Role description for a Scrutiny Co optee Appendix A local Government (Wales) Measure 2011	Role descriptions are available for all members covering all aspects of their role. Members are undertaking the responsibilities described in the role descriptions. Role descriptions inform the PDR process	Every member has a role description which matches what they do. Including guidance for members of a working or task and finish group – not a role description as such but some information to help members understand what is expected of them. All members need to be undertaking their roles in accordance with their role descriptions evidenced by having individually developed and/or agreed their RD.

	Leader of the Opposition Member Champion Guidance is provided to members on their role on outside bodies.	Outside Bodies Where members are responsible for formally representing the authority or making decisions that could impact on the authority or have legal obligations as - for example trustees of an organisation, they should be provided with a role description. In all instances members should be provided with guidance on their role on the outside body. Officers should secure (where available) terms of reference from outside bodies.		
2. Members are supported in undertaking their duties according to high standards of conduct.	All members are provided with training and development in the detail of the local code of conduct, taking into account any changes in the model or local codes as they emerge.	What can be interpreted as training and development? Any activities which help members understand what the code is and how they need to work within it. This could include written guidance, induction sessions, workshops, Q&A sessions.	Training is updated and delivered regularly. Potential breaches are addressed internally, as set out in the Ombudsman's report concerning local resolution. There are few justifiable referrals to the Ombudsman because members do not understand the code.	
3. Members are supported in	All members have received training on and understand	Training has been made available to all members and	The Constitution and related documents	Changes include governance arrangements
understanding their	the contents of the	take up of this has been high.	listed at level one	due to the introduction of

roles and responsibilities as set out in the Constitution. B. Member Development	 the roles, responsibilities and limits to the roles of committees the role of individual members and officers Member/officer protocols meeting practice standing orders rules of debate 	The constitution sets out the roles and responsibilities of every committee and broadly the role of the key players at each committee, for example chairs, support officers and regular/key participants. Role descriptions may be in the constitution or as a separate document but should be formally adopted and valued.	change in line with requirements.	structures to support collaborative services.
B1. A member learning and development strategy has been adopted.	A local member development strategy is in place. The strategy sets out the approach that the authority and the Democratic Services Committee takes to member development. It includes: • a commitment to and methodology for undertaking development needs analyses through a PDR scheme or TNA for those members not requesting a		All aspects of the strategy are in place and functioning effectively, with an effective methodology for monitoring and reviewing the strategy over time.	

	PDR, which identifies the local and national, collective and individual development needs of all members. • a commitment to and methodology for developing members according to the needs of the organisation. • a commitment to and methodology for creating personal development plans for all members. • a methodology for responding to the development needs of members identified in their personal support and development reviews or TNAs.			
B2. Arrangements are in place for <u>all</u> members to be offered a PDR.	Personal support and development reviews which are: • based on role descriptions • contribute to personal development plans	What is a PDR? An opportunity for a member to discuss with any senior member or other suitably qualified person their own requirements for training and development.	The majority of members undertake PDRs regularly and at least annually according to the requirements set out in the first level. The PDR provides opportunities	The outcomes effectively and regularly inform the member development strategy and programme. Members report that the process is useful and that their needs are, where possible, being met in

	are conducted by senior members or other deemed suitably qualified as set out in the Measure guidance are made available for all members and must be undertaken by members in a receipt of a senior/civic salary. Note, although the measure does not require the leader to undertake a review, the Charter does. The Charter requires that all members in receipt of a senior salary undertake this. The Measure is voluntary but for all members.	This should include some examination of current duties as set out in the role descriptions listed above and may include some self or supported reflection on current performance as a starting point. The outcomes of the discussion should feed into a personal development plan held by the member with the required development activities and also be recorded by the authority so that development activities can be arranged to support every members needs. The WLGA document 'Guidance for Authorities Planning to Implement Personal Development Reviews for Member' provides guidance in this area. Anyone conducting reviews should have received training in their purpose and methodology.	for members to identify the level at which development is required.	terms of content and level.
B3. A development programme for councillors is in place with a	An annual development programme informed by the member development strategy is in place	There is an annual programme of events and learning opportunities for members both collectively	The development programme is updated every year following monitoring and	

mechanism for its annual review.

All councillors are made aware of, guided to and are able to access the development activities equally.

- The annual development programme is planned and publicised in advance.
- Members are made aware of development opportunities provided in response to their needs.

The timings and settings of activities are varied to enable equal access by all, including those members who are working, are carers or have child care responsibilities.

and individually. This programme is informed by the organisational priorities set out in the strategy and in any requirements identified in the personal development plans which emerge from PDRs and TNAs. The programme should be developed by relevant officers and members for example the DSC/MDWG/ MD Champion, DS/HR officers and directors/service heads. The programme includes 'specialist' areas of development reflecting the needs of members in developing skills and understanding in both corporate governance and thematic or service areas.

The programme is provided to members giving sufficient notice for attendance.

Members are notified of specific events in which they have expressed an interest.

The programme is designed to offer choice or variety of opportunities to attend.

evaluation of the previous year and is demonstrably in line with member needs and the MD strategy. The content of the programme is made available to suit the needs of members with different skills and experience. i.e there is some levelling to development activities.

B4. Prospective candidates, candidates and new members are informed of their role and responsibilities.	 The Council uses the national guidance and support materials available for candidates and prospective candidates. All new or returning members are provided with a programme of induction. 	What is the national Guidance? This refers to the materials provided by the Association and others, to people in the community (not just those who have decided to stand) to encourage them to stand for office and to those who have already declared their intention to stand. These will be different for each election and at different times in the political calendar. The Association will have an overview of what is available. What constitutes an induction programme? This will vary between authorities but should at the base level be any activity that introduces new members to their roles both within and outside the council and the work of the authority generally. Use is made of the national induction materials provided by the WLGA.	Use is/planned or made of the national questionnaire to inform the development of candidates information for the next elections • The candidates profile is measured in the national questionnaire and steps are taken or planned to inform groups or individuals who are not standing in the next elections. • Local information is provided to candidates in addition to that available nationally. Every member moving to a new role has received an induction for that role.	Notable practice might include road shows, media/social media campaigns. Website/printed promotional material.
B5. Development activities are	Learning activities are provided in appropriate	What are appropriate styles and settings?	Training and development is	
relevant and of high	styles and settings based	A mix of for example	provided to a	

quality.	on the learning needs and styles of individuals and committees. The authority has a systematic and effective approach to commissioning, developing, providing and evaluating its training and development activities. This could include internal, external and collaborative arrangements.	formal/informal group/individual, interactive/passive working environment/away day The authority would need to demonstrate an effective selection process for commissioning training. This might include working with the WLGA and should include working collaboratively where appropriate with other authorities to share intelligence or undertake joint procurement. Internal training, (rather than briefing) should be designed and provided with the support of training/OD professionals in addition to member support or policy/service officers.	consistently high standard, commissioning and evaluation is effective and systematic. The authority works regularly with other authorities to pool experiences and consider the sharing or coordination of joint programmes.	
B6. There is a clear	The Authority has clearly	This role should be	These arrangements	
responsibility for	defined the arrangements	undertaken by the Democratic Services Committee and its	are mature and effective in	
leading the programme, driving	for developing, implementing and	chair or other appropriate fora	representing the views	
the strategy and	monitoring its strategy for	such as a member support	of all members and the	
monitoring the out	member support and	and development working	needs of the	
comes.	development. Individual	group. Individual member(s)	organisation in	
	members and officers have	and officer(s) have clear	sponsoring and	
	clear roles in leading and	overall responsibility for	developing the strategy	
	championing this area. The	developing, implementing and	and monitoring the	
	needs of all political groups	monitoring the strategy and	training programme	
	and independent members	progress of the programme.	and outcomes.	

B7. Resources are identified and provided for member development.	are taken into account regardless of political affiliation. Dedicated resources are identified and provided for member development activities. The authority provides the "reasonable level" of development required by the Measure.	How dedicated is dedicated? Resources are specifically put aside and used for member development. The development activity can be very widely interpreted but should not be the usual business of the council. It could include traditional briefing, workshops or seminars handbooks, e. learning, induction activities. Resources should also include staff time, shared where possible between authorities.	Attendance, satisfaction and outcomes for members are monitored and low levels of attendance addressed. Resources, whether people or money, are allocated according to the priorities in the strategy arising from organisational needs or those expressed by members in their PDRs and TNAs. Consideration has been given to sharing resources between authorities and (where a clear benefit exists) collaborative arrangements have been made.	
B8. Members are offered the opportunity to be mentored by member peers.	The authority is exploring the needs of members to be mentored. Any member who has requested a mentor is provided with one. Mentors are trained in mentoring skills.	The authority is speaking to members about the concept and benefits of mentoring to gauge interest. Mentoring might include member to member or working with member or officer "buddies" The authority should be exploring the need to provide Leadership mentoring for the	The authority has a mentoring strategy to support the needs of members who have requested mentors.	

		Leader and Cabinet if requested.		
C. Member Support				
C1. Officer support is provided for member development, support and scrutiny.	Every member committee, panel, forum etc. has officer support provided. Members are also supported in their case work. Overview and scrutiny committees have dedicated support from officers who can provide impartial research, support and advice. The nature of the support has been clearly articulated to members	Officer support should be provided for every council meeting and committee. Systems should be in place to support members in non Party Political case and community work whether from member support or other service areas. Support for collaborative governance arrangements such as joint committees and commissioning boards should also be evidenced. There needs to be a resource (dedicated or otherwise) in the authority who can provide members with advice in relation to the discharge of the authority's scrutiny function, and support for scrutiny members or committees by impartially researching information. This should be in direct response to the needs of members when they are undertaking their legitimate scrutiny role.	Members are satisfied with the level of support provided.	

C2. Arrangements made for the business of the Council are flexible and enable members to participate fully regardless of personal circumstances	A review of the arrangements for council business has taken place and as a result, meeting times, arrangements and venues reflect the needs of members as closely as possible. Members have been involved in developing the approaches to remote attendance as set out in the standing orders as/when required by the Measure.	Authorities should have undertaken a review in line with Measure guidance i.e at least once every term, preferably shortly after the new council is elected which at least measures whether daytime or evenings are preferred and if particular times cause problems for individual members. Individual committees should be able to define what is convenient for members of that committee. What should be demonstrated is an awareness of the restrictions placed on members by holding council meetings at certain times and some evidence of flexibility in meeting arrangements as a result.	The authority can demonstrate that it knows the requirements of its current members and has met them. i.e meetings are arranged to suit the convenience of the majority of members expected to attend the meeting. Special arrangements are made for those members who have special access requirements. Arrangements for remote attendance should be in place. Note The criteria for remote attendance should only be applied when the Measure has been enacted.	
C3. Contact management and	Systems are in place to enable members to liaise	These systems should include agreed standards for	The systems required for level one are	
communication	with council officers	response times, complaints	working effectively.	
	regarding services provided	procedures and processes to	Members can	
	both within and outside the	support community and	effectively access	
	authority. Community	casework. Members should	officers regarding	

C4. Annual reports	groups and individuals are also assisted in contacting local members. Members are able to contact stakeholders. The authority makes arrangements for all members to be able to publish annual reports,	be provided with information regarding which officers to contact regarding complaints and casework relating to any service delivered by or on behalf of the council. Members are provided with support and guidance on using the authority's systems.	service delivery and individuals and communities can access members. Members in receipt of a Senior/Civic Salary publish annual reports.	
C5. Personal support for members	according to the guidance in the measure. Members are provided with access to guidance on their rights and benefits as members.	Members are provided with general advice on what might be described as 'employment' rights and benefits relating to their role as councillors. This includes member salaries, family absence, allowances, tax and benefits, pensions, indemnities, data protection and freedom of information.	Members report that this information and advice is adequate.	
D. Member Facilities				
D1. All members are provided with adequate access to ICT.	 Members are provided with the equipment, or connectivity required to undertake their role. Basic training is provided in its use 	Members are provided with equipment for their individual use to undertake council business. They are shown how to use the equipment and packages.	Members are routinely using the provisions required for level one and report that this is sufficient.	
	provided in its use and help desk	They are able to have assistance if they are		

	facilities are	experiencing problems with		
	available.	using the equipment or it is		
		faulty.		
	Members are			
	supported in remote	Members are advised on the		
	working through the	use of mobile		
	use of remote access	communications and digital		
	codes and Skype etc.	and social media and have		
		access to relevant social		
	Members are	media sites, discussion fora		
	provided with support to enable them to	and communities of practice		
	remotely attend	such as is required to undertake their role.		
	meetings according	undertake tileli lole.		
	to the standards set	All council agendas and		
	out in the standing	meeting papers are provided		
	orders (when	electronically.		
	implemented through	,		
	the Measure).			
	 Members are able to 			
	communicate with			
	the council and the			
D2. Information	public electronically. A central collection of	An up to date and regularly	Members routinely use	Good practice might
resources are	information dedicated to	revised collection of	the provisions required	include an interactive portal
provided	member needs is provided	information resources is	for level one and report	•
1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	as part of the information	available specifically for	that this is sufficient.	
	and research support	members.		
	available to members.			
		This contains agendas,		
		minutes, training		
		opportunities, links to web		
		resources and access to		

		performance data.		
		Members are informed about the information that is available.		
D3. Facilities for members to work in the Council are available.	Member needs have been reviewed and where required the following are provided: Shared areas for example for each political group. Private rooms for meetings. Offices for senior office holders.	The needs of members must have been assessed. Rooms must be available but not necessarily permanently dedicated.	Members report that facilities are sufficient and that their needs are regularly reviewed.	

A Self Assessment Pro-forma for the Standard Level Charter

A. Member Roles and Responsibilities	Charter Requirement	Charter Expansion and Clarification	Description of authority approach and actions	References to supporting evidence enclosed
1. Members are supported with role descriptions.	Role descriptions are adopted for the: Leader Deputy Leader Cabinet Members Scrutiny members Scrutiny Chairs Scrutiny Co-optees Chairs of statutory committees Chair of the Audit Committee Members of Audit Committee Members of Democratic Services Member of Democratic Services Ward Member, including community leadership and case work Chair of Standards committee Member of Standards	What does adopted mean? Role descriptions exist and have been formally adopted for all the roles listed. There is no need at this level for members to evidence that they perform the roles outlined in the descriptions but they should understand what their role is and what is expected of them. What can be defined as a role description? See the WLGA model role descriptions for Welsh Authorities and the WLGA document The Role of Members in Collaboration and The Model Role description for a Scrutiny Co optee	Example Entry: Role descriptions have been adopted for all the listed roles. These were adopted by full council on 27.07.12 having been developed by the MDWG from the WLGA framework. Every member agreed and signed their role descriptions in September 2012.	Example Evidence References: Full set of signed role descriptions evidence ref a.1.1 council minutes 27.07.12 evidence ref a.1.2 MDWG minutes 15.06.12 and 01.07.12 evidence ref a.1.3 Terms of reference for outside bodies with emails to members evidence ref a.1.4 E mail to members 27.09.12 evidence ref a.1.5

	Committee	Appendix A lead	
	_	Appendix A local	
	Leader of the	Government (Wales)	
	Opposition	Measure 2011	
	 Member Champion 		
		Outside Bodies	
	Guidance is provided to	Where members are	
	members on their role on	responsible for formally	
	outside bodies.	representing the authority or	
		making decisions that could	
		impact on the authority or	
		have legal obligations as -	
		for example trustees of an	
		organisation, they should be	
		provided with a role	
		description. In all instances	
		members should be	
		provided with guidance on	
		their role on the outside	
		body. Officers should	
		secure (where available)	
		terms of reference from	
		outside bodies.	
2. Members are supported	All members are provided	What can be interpreted	
in undertaking their	with training and	as training and	
duties according to high	development in the detail of	development?	
standards of conduct.	the local code of conduct,	Any activities which help	
	taking into account any	members understand what	
	changes in the model or	the code is and how they	
	local codes as they emerge.	need to work within it. This	
		could include written	
		guidance, induction	
		sessions, workshops, Q&A	
		sessions.	
3. Members are supported	All members have received	Training has been made	
T Olling of and dappointed	,	g nac scon made	1

in understanding their roles and responsibilities as set out in the Constitution.	training on and understand the contents of the constitution, including: • the roles, responsibilities and limits to the roles of committees • the role of individual members and officers • Member/officer protocols • meeting practice • standing orders • rules of debate	available to all members and take up of this has been high. The constitution sets out the roles and responsibilities of every committee and broadly the role of the key players at each committee, for example chairs, support officers and regular/key participants. Role descriptions may be in the constitution or as a separate document but should be formally adopted and valued.	
B. Member Development			
B1. A member learning and development strategy has been adopted.	A local member development strategy is in place. The strategy sets out the approach that the authority and the Democratic Services Committee takes to member development. It includes: • a commitment to and methodology for undertaking development needs analyses through a PDR scheme or		

P2 Arrangements are in Porc	and methodology for developing members according to the needs of the organisation. • a commitment to and methodology for creating personal development plans for all members. • a methodology for responding to the development needs of members identified in their personal support and development reviews or TNAs.	What is a PDR?	
_	sonal support and elopment reviews which	An opportunity for a	
be offered a PDR. are:	Siopmont reviews willen	member to discuss with any	
are.	based on role	senior member or other	
	descriptions	suitably qualified person	
	•		
	contribute to	their own requirements for	

	personal development plans are conducted by senior members or other deemed suitably qualified as set out in the Measure guidance are made available for all members and must be undertaken by members in a receipt of a senior/civic salary. Note, although the measure does not require the leader to undertake a review, the Charter does. The Charter requires that all members in receipt of a senior salary undertake this. The Measure is voluntary but for all members.	training and development. This should include some examination of current duties as set out in the role descriptions listed above and may include some self or supported reflection on current performance as a starting point. The outcomes of the discussion should feed into a personal development plan held by the member with the required development activities and also be recorded by the authority so that development activities can be arranged to support every members needs. The WLGA document 'Guidance for Authorities Planning to Implement Personal Development Reviews for Member' provides guidance in this area. Anyone conducting reviews should have received training in their purpose and methodology. There is an annual		
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programme for councillors is in place with a mechanism for its annual review.

All councillors are made aware of, guided to and are able to access the development activities equally. programme informed by the member development strategy is in place

- The annual development programme is planned and publicised in advance.
- Members are made aware of development opportunities provided in response to their needs.

The timings and settings of activities are varied to enable equal access by all, including those members who are working, are carers or have child care responsibilities.

programme of events and learning opportunities for members both collectively and individually. This programme is informed by the organisational priorities set out in the strategy and in any requirements identified in the personal development plans which emerge from PDRs and TNAs. The programme should be developed by relevant officers and members for example the DSC/MDWG/MD Champion, DS/HR officers and directors/service heads. The programme includes 'specialist' areas of development reflecting the needs of members in developing skills and understanding in both corporate governance and thematic or service areas.

The programme is provided to members giving sufficient notice for attendance.

Members are notified of specific events in which they have expressed an

		interest.	
B4. Prospective candidates, candidates and new members are informed of their role and responsibilities.	 The Council uses the national guidance and support materials available for candidates and prospective candidates. All new or returning members are provided with a programme of induction. 	The programme is designed to offer choice or variety of opportunities to attend. What is the national Guidance? This refers to the materials provided by the Association and others, to people in the community (not just those who have decided to stand) to encourage them to stand for office and to those who have already declared their intention to stand. These will be different for each election and at different times in the political calendar. The Association will have an overview of what is available. What constitutes an induction programme? This will vary between authorities but should at the base level be any activity that introduces new members to their roles both	
		within and outside the council and the work of the authority generally.	

B5. Development activities are relevant and of high quality.	Learning activities are provided in appropriate styles and settings based on the learning needs and styles of individuals and committees. The authority has a systematic and effective approach to commissioning, developing, providing and evaluating its training and development activities. This could include internal, external and collaborative arrangements.	Use is made of the national induction materials provided by the WLGA. What are appropriate styles and settings? A mix of for example formal/informal group/individual, interactive/passive working environment/away day The authority would need to demonstrate an effective selection process for commissioning training. This might include working with the WLGA and should include working collaboratively where appropriate with other authorities to share intelligence or undertake joint procurement. Internal training, (rather than briefing) should be designed and provided with the support of training/OD professionals in addition to member support or	
B6. There is a clear responsibility for leading the programme, driving the strategy and	The Authority has clearly defined the arrangements for developing, implementing and	member support or policy/service officers. This role should be undertaken by the Democratic Services Committee and its chair or	

monitoring the out comes.	monitoring its strategy for member support and development. Individual members and officers have clear roles in leading and championing this area. The needs of all political groups and independent members are taken into account regardless of political affiliation.	other appropriate fora such as a member support and development working group. Individual member(s) and officer(s) have clear overall responsibility for developing, implementing and monitoring the strategy and progress of the programme.	
B7. Resources are identified and provided for member development.	Dedicated resources are identified and provided for member development activities. The authority provides the "reasonable level" of development required by the Measure.	How dedicated is dedicated? Resources are specifically put aside and used for member development. The development activity can be very widely interpreted but should not be the usual business of the council. It could include traditional briefing, workshops or seminars handbooks, e. learning, induction activities. Resources should also include staff time, shared where possible between authorities.	
B8. Members are offered the opportunity to be mentored by member peers.	The authority is exploring the needs of members to be mentored. Any member who has requested a	The authority is speaking to members about the concept and benefits of mentoring to gauge interest. Mentoring	

C. Member Support	mentor is provided with one. Mentors are trained in mentoring skills.	might include member to member or working with member or officer "buddies" The authority should be exploring the need to provide Leadership mentoring for the Leader and Cabinet if requested.	
C1. Officer support is provided for member development, support and scrutiny.	Every member committee, panel, forum etc. has officer support provided. Members are also supported in their case work. Overview and scrutiny committees have dedicated support from officers who can provide impartial research, support and advice. The nature of the support has been clearly articulated to members	Officer support should be provided for every council meeting and committee. Systems should be in place to support members in non Party Political case and community work whether from member support or other service areas. Support for collaborative governance arrangements such as joint committees and commissioning boards should also be evidenced. There needs to be a resource (dedicated or otherwise) in the authority who can provide members with advice in relation to the discharge of the authority's scrutiny function, and support for scrutiny	

for the business of the Council are flexible and enable members to participate fully regardless of personal circumstances	A review of the arrangements for council business has taken place and as a result, meeting times, arrangements and venues reflect the needs of members as closely as possible. Members have been involved in developing the approaches to remote attendance as set out in the standing orders as/when required by the Measure.	members or committees by impartially researching information. This should be in direct response to the needs of members when they are undertaking their legitimate scrutiny role. Authorities should have undertaken a review in line with Measure guidance i.e at least once every term, preferably shortly after the new council is elected which at least measures whether daytime or evenings are preferred and if particular times cause problems for individual members. Individual committees should be able to define what is convenient for members of that committee. What should be demonstrated is an awareness of the restrictions placed on members by holding council meetings at certain times and some evidence of flexibility in meeting arrangements as a result.	
_	Systems are in place to enable members to liaise	These systems should include agreed standards	

	with council officers regarding services provided both within and outside the authority. Community groups and individuals are also assisted in contacting local members. Members are able to contact stakeholders.	for response times, complaints procedures and processes to support community and casework. Members should be provided with information regarding which officers to contact regarding complaints and casework relating to any service delivered by or on behalf of the council.	
C4. Annual reports	The authority makes arrangements for all members to be able to publish annual reports, according to the guidance in the measure.	Members are provided with support and guidance on using the authority's systems.	
C5. Personal support for members	Members are provided with access to guidance on their rights and benefits as members.	Members are provided with general advice on what might be described as 'employment' rights and benefits relating to their role as councillors. This includes member salaries, family absence, allowances, tax and benefits, pensions, indemnities, data protection and freedom of information.	
D. Member Facilities			
D1. All members are provided with adequate access to ICT.	 Members are provided with the equipment, or 	Members are provided with equipment for their individual use to undertake	

D2. Information resources	connectivity required to undertake their role. Basic training is provided in its use and help desk facilities are available. Members are supported in remote working through the use of remote access codes and Skype etc. Members are provided with support to enable them to remotely attend meetings according to the standards set out in the standing orders (when implemented through the Measure). Members are able to communicate with the council and the public electronically. A central collection of	Council business. They are shown how to use the equipment and packages. They are able to have assistance if they are experiencing problems with using the equipment or it is faulty. Members are advised on the use of mobile communications and digital and social media and have access to relevant social media sites, discussion fora and communities of practice such as is required to undertake their role. All council agendas and meeting papers are provided electronically.	
are provided	information dedicated to	revised collection of	

	member needs is provided as part of the information and research support available to members.	information resources is available specifically for members. This contains agendas, minutes, training opportunities, links to web resources and access to performance data. Members are informed	
		about the information that is available.	
D3. Facilities for members to work in the Council are available.	Member needs have been reviewed and where required the following are provided: Shared areas for example for each political group.	The needs of members must have been assessed. Rooms must be available but not necessarily permanently dedicated.	
	 Private rooms for meetings. Offices for senior office holders. 		

A Submission Pro-forma for the Advanced Level Charter

Appendix 2 – Submission Pro- forma Advanced Level

A. Member Roles and Responsibilities	Charter Requirement	Charter Expansion and Clarification	Advanced Charter Requirements	Description of authority approach and actions	References to supporting evidence enclosed
1. Members are supported with role descriptions.	Role descriptions are adopted for the: Leader Deputy Leader Cabinet Members Scrutiny members Scrutiny Chairs Chairs of statutory committees Chair of the Audit Committee Members of Audit Committee Chair of Democratic	What does adopted mean? Role descriptions exist and have been formally adopted for all the roles listed. There is no need at this level for members to evidence that they perform the roles outlined in the descriptions but they should understand what their role is and what is expected of them. What can be defined as a role description? See the WLGA model role descriptions for Welsh Authorities	Role descriptions are available for all members covering all aspects of their role. Members are undertaking the responsibilities described in the role descriptions. Role descriptions inform the PDR process. Every member has a role description which matches what they do. Including guidance for members of a working or task and finish group – not a role description as such but some information to help members	Role descriptions for all members were developed by the D.S Committee in consultation with all members and agreed by Full Council in September 2012. Each RD outlines all aspects of that member's role. Each member has also been supplied with guidance covering their role on task and finish groups. Members agreed that the contents of their own RDs were a reflection of the work they undertake and signed them	Example evidence references: Full set of signed role descriptions evidence ref a1.1 D.S Committee minutes 19.07.12 and 28.08 12 evidence ref a1.2 email to Members regarding task and finish terms of reference and member responsibilities evidence ref a1.3 council minutes 29.11.12 evidence ref a1.4 emails to individual members regarding

Member of Democratic Services Ward Member, including community leadership and case work Chair of Standards committee Member of Standards Committee Leader of the Opposition Member Champion Guidance is provided to members on their role on outside bodies.	• the WLGA document The Role of Members in Collaboration and • The Model Role description for a Scrutiny Co optee Appendix A local Government (Wales) Measure 2011 Outside Bodies Where members are responsible for formally representing the authority or making decisions that could impact on the authority or have legal obligations as - for example trustees of an organisation, they should be provided with a role	expected of them. All members need to be undertaking their roles in accordance with their role descriptions evidenced by having individually developed and/or agreed their RD.	accordingly. The role descriptions are provided to members conducting PDRs and used with the authority's member development framework as the basis for PDR discussions.	ref a1.5 PDR Guidance evidence ref B2.2 Members confirmation that roles are undertaken to be discussed at site visit.
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2. Members are supported in undertaking their duties according to high standards of conduct.	All members are provided with training and development in the detail of the local code of conduct, taking into account any changes in the model or local codes as they emerge.	description. In all instances members should be provided with guidance on their role on the outside body. Officers should secure (where available) terms of reference from outside bodies. What can be interpreted as training and development? Any activities which help members understand what the code is and how they need to work within it. This could include written	Training is updated and delivered regularly. Potential breaches are addressed internally, as set out in the Ombudsman's report concerning local resolution. There are few justifiable referrals to	
		include written guidance, induction	the Ombudsman	
		sessions, workshops, Q&A	because members do not understand	
		sessions.	the code.	
3. Members are	All members have	Training has been	The Constitution and	
supported in	received training on	made available to all	related documents	
understanding	and understand the	members and take	listed at level one	
their roles and	contents of the	up of this has been	change in line with	
responsibilities as set out in the	constitution,	high.	requirements.	
Constitution.	including:	The constitution sets	Changes include	
Constitution.	the roles,	out the roles and	governance	
	• the roles,	out the roles and	governance	

	responsibiliti es and limits to the roles of committees • the role of individual members and officers • Member/offic er protocols • meeting practice • standing orders • rules of debate	responsibilities of every committee and broadly the role of the key players at each committee, for example chairs, support officers and regular/key participants. Role descriptions may be in the constitution or as a separate document but should be formally adopted and valued.	arrangements due to the introduction of structures to support collaborative services.	
B. Member Development				
B1. A member learning and development strategy has been adopted.	A local member development strategy is in place. The strategy sets out the approach that the authority and the Democratic Services Committee takes to member development. It includes: • a commitment to and		All aspects of the strategy are in place and functioning effectively, with an effective methodology for monitoring and reviewing the strategy over time.	

methodology		
for		
undertaking		
development		
needs		
analyses		
through a		
PDR scheme		
or TNA for		
those		
members not		
requesting a		
PDR, which		
identifies the		
local and		
national,		
collective		
and		
individual		
development		
needs of all		
members.		
• a		
commitment		
to and		
methodology		
for		
developing		
members		
according to		
the needs of		
the		
organisation.		
• a		

		1	ı	T	1
	commitment				
	to and				
	methodology				
	for creating				
	personal				
	development				
	plans for all				
	members.				
	• a				
	methodology				
	for				
	responding				
	to the				
	development				
	needs of				
	members				
	identified in				
	their				
	personal				
	support and				
	development				
	reviews or				
DO A 2220 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	TNAs.	What is a DDDO	The medianity of		
B2. Arrangements	Personal support	What is a PDR?	The majority of		
are in place for <u>all</u>	and development	An opportunity for a	members undertake		
members to be	reviews which are:	member to discuss	PDRs regularly and		
offered a PDR.	 based on role 	with any senior	at least annually		
	descriptions	member or other	according to the		
	 contribute to 	suitably qualified	requirements set out		
	personal	person their own	in the first level. The		
	development	requirements for	PDR provides		
	plans	training and	opportunities for		
	• are	development.	members to identify		
	conducted by	'	the level at which		
	oonducted by		1		

000:	This about disclusion	davalannas:+:-	
senior	This should include	development is	
members or	some examination of	required.	
other deemed	current duties as set		
suitably	out in the role	The outcomes	
qualified as	descriptions listed	effectively and	
set out in the	above and may	regularly inform the	
Measure	include some self or	member	
guidance	supported reflection	development	
• are <u>made</u>	on current	strategy and	
<u>available</u> for	performance as a	programme.	
all members	starting point. The		
and <u>must</u> be	outcomes of the	Members report that	
undertaken	discussion should	the process is useful	
by members	feed into a personal	and that their needs	
in a receipt of	development plan	are, where possible,	
a senior/civic	held by the member	being met in terms	
salary.	with the required	of content and level.	
January .	development		
Note, although the	activities and also be		
measure does not	recorded by the		
require the leader to	authority so that		
undertake a review,	development		
the Charter does.	activities can be		
The Charter requires	arranged to support		
that all members in	every members		
receipt of a senior	needs.		
salary undertake	110000.		
this. The Measure is	The WLGA		
voluntary but for all	document 'Guidance		
members.	for Authorities		
incinucis.	Planning to		
	_		
	Implement Personal		
	Development		
	Reviews for		

		Member' provides guidance in this area. Anyone conducting reviews should have received training in their purpose and methodology.		
B3. A development	An annual	There is an annual	The development	
programme for councillors is in	development programme informed	programme of events and learning	programme is updated every year	
place with a	by the member	opportunities for	following monitoring	
mechanism for its	development	members both	and evaluation of the	
annual review.	strategy is in place	collectively and	previous year and is	
All councillors are	The annual	individually. This programme is	demonstrably in line with member needs	
made aware of, guided to and are	development programme is	informed by the organisational	and the MD strategy. The content of the	
able to access the	planned and	priorities set out in	programme is made	
development	publicised in	the strategy and in	available to suit the	
activities equally.	advance.	any requirements	needs of members	
	Members are	identified in the personal	with different skills and experience. i.e	
	made aware of	development plans	there is some	
	development	which emerge from	levelling to	
	opportunities	PDRs and TNAs.	development	
	provided in	The programme	activities.	
	response to	should be developed by relevant officers		
	their needs.	and members for		
	The timings and	example the		
	settings of activities	DSC/MDWG/ MD		
	are varied to enable	Champion, DS/HR		

	includ meml worki or ha	l access by all, ding those bers who are ng, are carers ve child care onsibilities.	officers and directors/service heads. The programme includes 'specialist' areas of development reflecting the needs of members in developing skills and understanding in both corporate governance and thematic or service areas.		
			The programme is provided to members giving sufficient notice for attendance.		
			Members are notified of specific events in which they have expressed an interest.		
B4. Prospective		The Council	The programme is designed to offer choice or variety of opportunities to attend. What is the	Use is/planned or	

andidates	Lugge the	national Cuidence?	made of the notional	
candidates,	uses the	national Guidance?	made of the national	
candidates and	national	This refers to the	questionnaire to	
new members are	guidance and	materials provided	inform the	
informed of their	support	by the Association	development of	
role and	materials	and others, to	candidates	
responsibilities.	available for	people in the	information for the	
	candidates	community (not just	next elections	
	and	those who have		
	prospective	decided to stand) to	The candidates	
	candidates.	encourage them to	profile is	
		stand for office and	measured in the	
	All new or	to those who have	national	
	returning	already declared	questionnaire	
	members are	their intention to	and steps are	
	provided with	stand. These will be	taken or planned	
	a programme	different for each	to inform groups	
	of induction.	election and at	or individuals	
		different times in the	who are not	
		political calendar.	standing in the	
		The Association will	next elections.	
		have an overview of		
		what is available.	 Local information 	
			is provided to	
		What constitutes	candidates in	
		an induction	addition to that	
		programme?	available	
		This will vary	nationally.	
		between authorities		
		but should at the	Every member	
		base level be any	moving to a new role	
		activity that	has received an	
		introduces new	induction for that	
		members to their	role.	
		roles both within and		

		outside the council and the work of the authority generally. Use is made of the national induction materials provided by the WLGA.	Notable practice might include road shows, media/social media campaigns. Website/printed promotional material.	
B5. Development activities are	Learning activities	What are	Training and	
relevant and of	are provided in appropriate styles	appropriate styles and settings?	development is provided to a	
high quality.	and settings based	A mix of for example	consistently high	
ing. quanty:	on the learning	formal/informal	standard,	
	needs and styles of	group/individual,	commissioning and	
	individuals and	interactive/passive	evaluation is	
	committees. The	working	effective and	
	authority has a	environment/away	systematic.	
	systematic and effective approach to	day The authority would need to	The authority works	
	commissioning,	demonstrate an	regularly with other	
	developing,	effective selection	authorities to pool	
	providing and	process for	experiences and	
	evaluating its	commissioning	consider the sharing	
	training and	training. This might	or coordination of	
	development activities. This could	include working with the WLGA and	joint programmes.	
	include internal,	should include		
	external and	working		
	collaborative	collaboratively		
	arrangements.	where appropriate		
		with other authorities		
		to share intelligence		
		or undertake joint		
		procurement.		

		Internal training, (rather than briefing) should be designed and provided with the support of training/OD professionals in addition to member support or policy/service officers.		
B6. There is a clear	The Authority has	This role should be	These arrangements	
responsibility for	clearly defined the	undertaken by the	are mature and	
leading the	arrangements for	Democratic Services	effective in	
programme,	developing,	Committee and its	representing the	
driving the strategy	implementing and	chair or other	views of all	
and monitoring the	monitoring its	appropriate fora	members and the	
out comes.	strategy for member	such as a member	needs of the	
	support and	support and	organisation in	
	development.	development	sponsoring and	
	Individual members	working group.	developing the	
	and officers have	Individual	strategy and	
	clear roles in leading	member(s) and	monitoring the	
	and championing	officer(s) have clear	training programme	
	this area. The needs	overall responsibility	and outcomes.	
	of all political groups	for developing,	Attendance,	
	and independent	implementing and	satisfaction and	
	members are taken	monitoring the	outcomes for	
	into account	strategy and	members are	
	regardless of	progress of the	monitored and low	
	political affiliation.	programme.	levels of attendance	
			addressed.	
B7. Resources are	Dedicated resources	How dedicated is	Resources, whether	

identified and provided for member development.	are identified and provided for member development activities. The authority provides the "reasonable level" of development required by the Measure.	dedicated? Resources are specifically put aside and used for member development. The development activity can be very widely interpreted but should not be the usual business of the council. It could include traditional briefing, workshops or seminars handbooks, e. learning, induction activities. Resources should also include staff time, shared where possible	people or money, are allocated according to the priorities in the strategy arising from organisational needs or those expressed by members in their PDRs and TNAs. Consideration has been given to sharing resources between authorities and (where a clear benefit exists) collaborative arrangements have been made.	
B8. Members are offered the opportunity to be mentored by member peers.	The authority is exploring the needs of members to be mentored. Any member who has requested a mentor is provided with one. Mentors are trained in mentoring skills.	between authorities. The authority is speaking to members about the concept and benefits of mentoring to gauge interest. Mentoring might include member to member or working with member or officer "buddies"	The authority has a mentoring strategy to support the needs of members who have requested mentors.	

C. Member Support		The authority should be exploring the need to provide Leadership mentoring for the Leader and Cabinet if requested.		
C1. Officer support is provided for member development, support and scrutiny.	Every member committee, panel, forum etc. has officer support provided. Members are also supported in their case work. Overview and scrutiny committees have dedicated support from officers who can provide impartial research, support and advice. The nature of the support has been clearly articulated to members	Officer support should be provided for every council meeting and committee. Systems should be in place to support members in non Party Political case and community work whether from member support or other service areas. Support for collaborative governance arrangements such as joint committees and commissioning boards should also be evidenced. There needs to be a resource (dedicated	Members are satisfied with the level of support provided.	

	1			
		or otherwise) in the		
		authority who can		
		provide members		
		with advice in		
		relation to the		
		discharge of the		
		authority's scrutiny		
		function, and		
		support for scrutiny		
		members or		
		committees by		
		impartially		
		researching		
		information. This		
		should be in direct		
		response to the		
		needs of members		
		when they are		
		undertaking their		
		legitimate scrutiny		
		role.	-	
C2. Arrangements	A review of the	Authorities should	The authority can	
made for the	arrangements for	have undertaken a	demonstrate that it	
business of the	council business has	review in line with	knows the	
Council are flexible	taken place and as a	Measure guidance	requirements of its	
and enable	result, meeting	i.e at least once	current members	
members to	times, arrangements	every term,	and has met them.	
participate fully	and venues reflect	preferably shortly		
regardless of	the needs of	after the new council	i.e meetings are	
personal	members as closely	is elected which at	arranged to suit the	
circumstances	as possible.	least measures	convenience of the	
		whether daytime or	majority of members	
	Members have been	evenings are	expected to attend	
	involved in	preferred and if	the meeting. Special	

	developing the approaches to remote attendance as set out in the standing orders as/when required by the Measure.	particular times cause problems for individual members. Individual committees should be able to define what is convenient for members of that committee. What should be demonstrated is an awareness of the restrictions placed on members by holding council meetings at certain times and some evidence of flexibility in meeting arrangements as a result.	arrangements are made for those members who have special access requirements. Arrangements for remote attendance should be in place. Note The criteria for remote attendance should only be applied when the Measure has been enacted.	
C3. Contact management and communication	Systems are in place to enable members to liaise with council officers regarding services provided both within and outside the authority. Community groups and individuals are also assisted in contacting local members. Members	These systems should include agreed standards for response times, complaints procedures and processes to support community and casework. Members should be provided with information regarding which	The systems required for level one are working effectively. Members can effectively access officers regarding service delivery and individuals and communities can access members.	

C4. Annual reports	The authority makes arrangements for all members to be able to publish annual reports, according to the guidance in the	officers to contact regarding complaints and casework relating to any service delivered by or on behalf of the council. Members are provided with support and guidance on using the authority's systems.	Members in receipt of a Senior/Civic Salary publish annual reports.	
C5. Personal support for members	measure. Members are provided with access to guidance on their rights and benefits as members.	Members are provided with general advice on what might be described as 'employment' rights and benefits relating to their role as councillors. This includes member salaries, family absence, allowances, tax and benefits, pensions, indemnities, data protection and freedom of information.	Members report that this information and advice is adequate.	
D. Member Facilities				

D1. All members	Members are	Members are	Members are	
are provided with	provided with	provided with	routinely using the	
adequate access to	the	equipment for their	provisions required	
ICT.	equipment, or	individual use to	for level one and	
	connectivity	undertake council	report that this is	
	required to	business.	sufficient.	
	undertake			
	their role.	They are shown how		
		to use the		
	Basic training	equipment and		
	is provided in	packages.		
	its use and			
	help desk	They are able to		
	facilities are	have assistance if		
	available.	they are		
		experiencing		
	 Members are 	problems with using		
	supported in	the equipment or it is		
	remote	faulty.		
	working through the	Members are		
	use of remote	advised on the use		
	access codes	of mobile		
	and Skype	communications and		
	etc.	digital and social		
	Oto.	media and have		
	Members are	access to relevant		
	provided with	social media sites,		
	support to	discussion fora and		
	enable them	communities of		
	to remotely	practice such as is		
	attend	required to		
	meetings	undertake their role.		

	according to the standards set out in the standing orders (when implemented through the Measure). • Members are able to communicate with the council and the public electronically.	All council agendas and meeting papers are provided electronically.		
D2. Information resources are	A central collection of information	An up to date and regularly revised	Members routinely use the provisions	
provided	dedicated to member needs is	collection of information	required for level one and report that	
	provided as part of	resources is	this is sufficient.	
	the information and research support	available specifically for members.	Good practice might	
	available to members.	This contains	include an interactive portal	
	monibors.	agendas, minutes,	dedicated to	
		training opportunities, links	members.	
		to web resources		
		and access to performance data.		
		Members are		
		informed about the		

	-		1	
		information that is		
		available.		
D3. Facilities for	Member needs have	The needs of	Members report that	
members to work	been reviewed and	members must have	facilities are sufficient	
in the Council are	where required the	been assessed.	and that their needs	
available.	following are		are regularly	
	provided:	Rooms must be	reviewed.	
		available but not		
	Shared areas	necessarily		
	for example	permanently		
	for each	dedicated.		
	political			
	group.			
	Private rooms			
	for meetings.			
	Offices for			
	senior office			
	holders.			