(STANDARD) WLGA CHARTER ASSESSMENT

		Topic	Standard	Clarification	Status
A1		**Members are supported with role descriptions.**	Role descriptions are adopted for the: • Elected Member. • Democratic Services Committee Member. • Democratic Services Chair. • Scrutiny Committee Member. • Scrutiny Committee Chair. • Leader (and Deputy) • Cabinet Member • Chair of the Council • Chair of a Regulatory Committee • Member of a Regulatory Committee • Chair of Standards Committee • Member of Standards Committee • Chair of Governance and Audit Committee • Member of Governance and Audit Committee • Leader of the Opposition • Political Group Leader • Member Champion Role Description	**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 **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.	**Green** Council adopted the WLGA Role descriptions on 25 November 2021 with the intention to develop them to better reflect the roles of Elected Members in Cardiff. The WLGA provides general guidance in its "Appointment to Outside Bodies: The role of a Councillor Members' Toolkit." Which could be adopted by Council.
A2		**Members are supported in undertaking their duties according to**	All members are provided with training and development in the detail of the Members Code of	**What can be interpreted as training and development?**	**GREEN** All Members have been scheduled to undertake Mandatory Code of Conduct training with the Monitoring

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		high standards of conduct.	conduct, taking into account any changes in the model or local codes as they emerge.	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.	Officer as part of the Member Induction Programme. The Standards and Ethics and Committee: • issues regular newsletters highlighting key issues, • provides an Annual Report to Council.
A3		**Members are supported in understanding their roles and responsibilities as set out in the Constitution.**	All members have received 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	Training has been made 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.	**GREEN** Members are offered an overview of the Council its Constitution and meeting practices as part of the Member induction programme. Members who sit on Regulatory and Quasi-Judicial Committees complete mandatory training before they can participate in Committee business. Induction training is also provided to Scrutiny Committee Members. Refresher or additional briefings and guidance notes are provided when appropriate.
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 Personal Development Review scheme or Training Needs Assessment for those members		**Green** Council approved the latest version of the Elected Member Learning and Development Strategy (2019-2022) on 25 November 2021. The approval of this strategy provides the commitment of Council for member development. The methodology for Personal Development Reviews (PDRs) needs to be developed and adopted by Council. The Elected Member L:earning and Development Strategy requires review during 2022-23.

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			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 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 all members to be offered a PDR.	Personal support and development reviews which are: • based on role descriptions • contribute to 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	**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. 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	**RED** The methodology for providing personal development reviews or analysis of training needs requires review and adoption by Council Process to be available to all Members but this **must** be undertaken by all Senior Salary holders

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			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.	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.	
B3		**A development 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.**	An annual development 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. There is an annual 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.	**Green** The member development programme is updated by the Democratic Services Committee on a regular basis and circulated to all members for information. It is a rolling programme which includes at least the next 3 months of activities to ensure that the programme has an element of flexibility. The Democratic Services Committee identifies and categorises Member Development activities to reflect the: • requirement to undertake a learning activity • likely knowledge and experience of some Elected Members • importance and relevance of the learning activity.

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			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.	**Notification of Member Development activities are publicised as soon as practicably possible with multiple dates offered for a significant majority of 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.	**AMBER** Prospective councillor sessions have not been established. WLGA Be a Councillor. Be the Change website was made available for potential candidates prior to the 2022 Election.
			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.	**GREEN** An Induction Programme was approved by the Democratic Services Committee. All Members received Induction packs immediately after they were elected and participated in the Induction Day event and induction programme.
	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	**What are appropriate styles and settings?** A mix of for example formal/informal group/individual, interactive/passive	**GREEN** The Democratic Services Committee identifies appropriate learning activities. The Head of Democratic Services works with partners to determine whether the

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		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.	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.	activities can be delivered locally regionally or nationally and monitors the evaluation of activities to ensure that they are of a high standard. The Head of Democratic Services also collaborates with Officers and partners to enhance the quality and availability of E-Learning facilities.
B6	**There is a clear responsibility for leading the programme, driving the strategy and monitoring the outcomes.**	The Authority has clearly defined the arrangements for developing, implementing and 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.	This role should be undertaken by the Democratic Services Committee and its chair or other appropriate 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.	**GREEN** The Democratic Services Committee and its Chairperson supported by the Head of Democratic provides the direction for Member Support and Development activities. The Committee also receives updates on: • Member development activities, • Performance of member support facilities • Options for service improvements
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	**GREEN** Dedicated resources are in place for Member Development

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			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 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 Leader and Cabinet if requested.	**AMBER** Council approved and adopted the WLGA Guidance for Member Mentors . A number of Elected Members have been trained as Members Mentors and all Members have been offered the opportunity to be mentored. Informal Member Mentoring is undertaken by some of the political groups of the Council. Further work is needed to: • promote member mentoring • encourage Members to become Mentors • support wider mentoring and shadowing opportunities
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 casework. Overview and Scrutiny committees have dedicated support from officers who can provide impartial research, support and advice. The nature of the support has been	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.	**GREEN** Officer support is provided in committees and Members are supported in their casework. The Authority has dedicated scrutiny support.

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			clearly articulated to members	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.	
	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.	**GREEN** A survey of meeting times has been undertaken and the outcomes implemented The Constitution reflects the councils position on remote attendance at its Multi-location meetings
	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	These systems should include agreed standards for response times, complaints procedures and processes to support community and casework. Members should be provided with information	**GREEN** The Member Enquiry System covers this requirement and advice can be sought from officers regarding stakeholder contacts

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		are also assisted in contacting local members. Members are able to contact stakeholders.	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.		**GREEN** This process is in place and individual or groups of Ward Members
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.	**GREEN** HR and Democratic Services officers provide this support. All Members are offered the opportunity to join the Local Government Pension Scheme
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 and help desk facilities are available. • Members are able to communicate with the council and the public electronically. • Members are supported in remote working through the use of remote access	Members are provided with equipment for their individual use to undertake 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	**GREEN** Members are provided with a suitable ICT package including a mobile telephone and Laptop/Tablet. This equipment is supported by Democratic Services and the ICT department. Initial training on the use of these devices is provided. Technical issues are supported by the ICT helpdesk facility On 10 March 2022 Cabinet approved the Council's Multi-Location meeting Policy and members have been trained in the use of the Council's conferencing system.

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		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).	communities of practice such as is required to undertake their role. All council agendas and meeting papers are provided electronically.	All Council agenda and meeting papers are provided electronically using the Civica Modern.gov system.
D2	**Information resources are provided**	A central collection of information dedicated to member needs is provided as part of the information and research support available to members.	An up to date and regularly revised collection of information resources is available specifically for members. This contains agendas, minutes, training opportunities, and links to web resources and access to performance data. Members are informed about the information that is available.	**AMBER** Committee agenda minutes and reports are available on the intranet/internet and on Modern.gov. A suitable portal is being developed for the provision of Member information
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.		**GREEN** Elected Members are able to work in the Members Rooms in City and in County Halls. The Cabinet Members, Scrutiny Chairs and many of the Committee Chairpersons have dedicated offices The Political Groups have allocated office space