

Elected Member

# Learning & Development Strategy

2019-2022



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## Foreword

The role of a Councillor can be complex and challenging and is getting more so. The responsibilities and duties placed upon us by the Welsh Government, the Council, through the provision of its services and Councillor duties, and the communities we represent, grow and change with each election. Councillors are expected to carry out many roles ranging from community leader to taking on additional responsibilities within the council structure. Councillors have to balance the needs and interests of their community, their political party or group, and the council as a whole as well as, of course, their personal, family and employment commitments.

Constantly changing priorities, needs and legislation require difficult decisions for which Councillors need to be well informed. The provision of services, as well as the search for new and collaborative ways of working, for both front line and back office operations, can, in many cases, require difficult choices and a need for more information. Just as challenging can be the task of explaining these decisions, and dealing with the impact of these choices in our own communities. For many Councillors, this is something they may not have had to do before and might involve dealing with residents who are opposed to the outcome.

It is essential that the Council meets the needs of Councillors and provides excellent development opportunities to assist them in serving the citizens of this city. In fact, the Local Government (Wales) Measure 2011 directs Councils to place more emphasis on Member Development. The Democratic Services Committee will be working to ensure that Cardiff offers all its Councillors the best personal development opportunities to enable them to gain the knowledge and learning they may need, to properly serve the city and its citizens. The council also recognises that looking after the Wellbeing of Councillors is equally important and seeks to set the standard of excellence in both these areas.

The council sees the needs of Councillors in Cardiff as of paramount importance. This Elected Member Learning and Development Strategy sets out what are seen as the development priorities for the induction of newly Elected Members as well as the identification of each Councillors ongoing development, learning and wellbeing needs. As Councillors knowledge and experience grows, sometimes over many electoral cycles, the opportunities for them to undertake wider roles increases, bringing greater responsibilities and pressures. These new roles and responsibilities may require further learning and development. This strategy is intended to assist in equipping all members with the necessary skills, knowledge and help to meet the challenges that they may face during their term of office.

Councillor Michael Jones-Pritchard  
Chair of Democratic Services Committee

## **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 to 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

### 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. This will include identifying learning and development priorities and the adequacy of the Member Development budget.

To 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;
- 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.

### **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;

### **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 – Administration**

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

- Fulfilling their statutory requirements regarding their Acceptance of Office and completing their Declaration of Personal Interests,
- Creation of ICT accounts and provision of ICT equipment.
- Authority for the use of personal information to set up remuneration payments, web pages and enable officers to carry out other necessary administrative functions.
- A briefing of the facilities available to Elected Members within the Authority
- The taking of official photographs for use on the Cardiff Council website and ID cards

#### **Expected outcomes**

The following are the expected outcomes from this phase:



- All Acceptances of Office completed
- Elected Member induction administration completed
- Cardiff Undertaking signed by all Elected Members

## **Phase 2 – The Essentials**

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**

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:
  - Audit Committee
  - Constitution Committee
  - Corporate Parenting Advisory Committee

- Council Appeals Committee
- Democratic Services Committee
- Employment Conditions Committee
- Local Authority Governor Panel
- Pensions Committee
- Standards & Ethics Committee
- Licensing Committee
- Planning Committee
- Public Protection Committee
- Overview and Scrutiny Committees
- Representing constituents at meetings ie 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. Elected Members understand the roles to which they have been appointed.
- b. Elected Members are more able to carry their role in their wards and for the City.
- c. Elected Members are aware of their responsibilities when representing the Authority

### **Phase 4 – Identifying the Needs of Individual Councillors**

With the possibility of a large number of new Elected Members after an election, it will be necessary to undertake a Personal Review process<sup>1</sup> 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 mentor<sup>1</sup> 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.
- 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.

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<sup>1</sup> See Enhancing the current arrangements for Elected Member Learning and Development (Page 46-18-20)  
Version 2.0

### 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 have been offered a Member Mentor to assist in their development
- b. Elected Members regularly identify their support and development needs.

### **Phase 5 – Individual & Continuing Development**

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
2017-18	2	Labour x 2
2018-19	2	Labour x 2
2019-20	2	Conservative x 1 Liberal Democrat x 1
2020-21	2	Conservative x 1 Labour x 1
2021-22	2	Conservative x 1 Liberal Democrat x 1

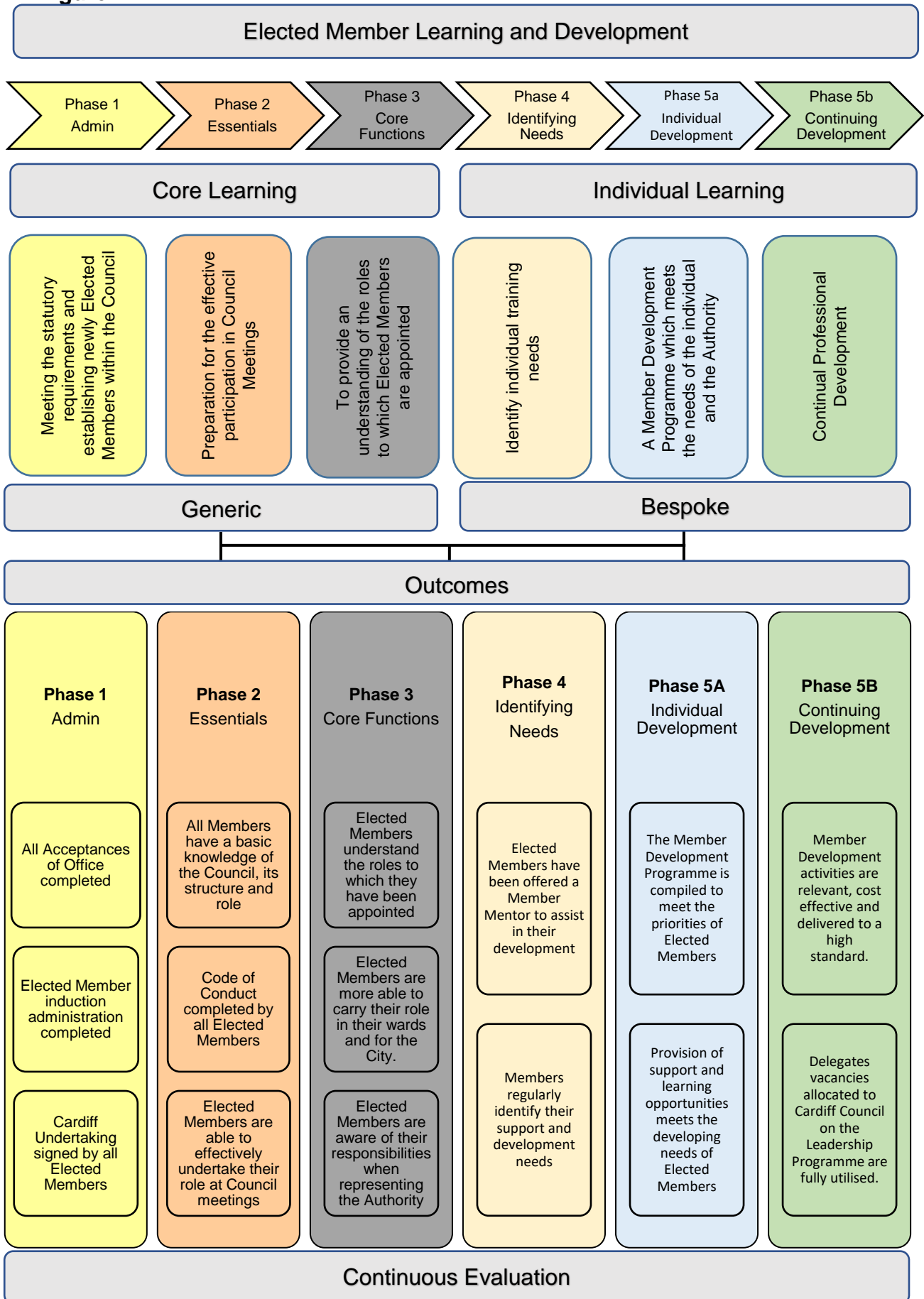
Should there be sufficient interest a bespoke Leadership Programme could be provided by the WLGA specifically for Cardiff councillors. It should be acknowledged that this option does have financial implications and does not provide the networking opportunities with other Local Authority Members which 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, 2 hour 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.

## **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.

### **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:

- Essential E-learning modules to be identified by the Democratic Services Committee and included as part of an Elected Member Induction. Elected Members will be expected to complete the identified induction e-learning modules.

- 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 subsequent report will be provided by Cardiff Academy to confirm that the e-learning modules have been completed as requested by the Democratic Services Committee.
- 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 engage with these learning activities and ensure that development records are maintained.

### **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 Travellers

### **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 be a rolling programme that will confirm the Member Development activities for the following 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 and passed to 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 attendance of their Members.

### **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 the Autumn of 2020, 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:

#### **Role Descriptions**

The WLGA provides a suite of generic role descriptions which are being reviewed with the intention of adapting them to better reflect the roles that Elected Members undertake in Cardiff.

Role descriptions set out the responsibilities and functions of the role of an Elected Member. The person specifications describe the qualities and skills desirable to fulfil the role and can help when considering personal development.

Where Elected Members undertake more than one role it is anticipated that role descriptions would be combined. For example: Overview and Scrutiny committee chairs would be expected to undertake the role of Elected Member, Overview and Scrutiny Member Overview and Scrutiny Chair.

### **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 .

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.

### **Potential Candidate Briefings**

In order to promote local democracy and the understanding of the role of a councillor briefings for potential candidates will be held prior to Local Government elections. This event will inform those members of the public planning to stand for election of the:

- The criteria to stand for election,
- election process
- roles and responsibilities they will be expected to undertake as a councillor
- skills, knowledge and commitment necessary to become an effective councillor
- structure and remit of the Council

### **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.