Essex County Council: East of England Member Development Charter Self- Assessment 16/01/13

MEMBER DEVELOPMENT CHARTER SELF-ASSESSMENT

1. Commitment to councillor development

Elements	Specific Minimum Requirements for Charter	EVIDENCE / ACTION	RAG and by when	BY WHO	Update
1.1. Political and managerial leadership is committed to the development of councillors. **What this means in practice** Political and managerial leadership put strategies into place to improve councillor and council performance.	• Clear commitment from the top political and managerial leadership • Signed commitment to member development and action plan • Established all party training and development task group that meets regularly • There is a clear strategy • Feedback from Members confirms that strategy & actions described, take place • Named councillor(s) and officer(s) responsible for councillor development • Evidence that all-party training and development task group meet on regular basis	*Evidence:* • *ECC have a Member Development Steering Group (MDSG) and a Lead Member for Member Development.* • *The Member Development Steering Group is a cross party Group. The Member Development Steering Group Members were formally agreed by Council 13/12/11.* • *The ECC Member Development Strategy and Action Plan were formally agreed by Council 13/12/11.* • *Formal commitment to the Charter was made at Full Council on 13/12/11.* • *Joanna Boaler is the named officer for Member Development as the Member Support Manager.* • *Member Zone intranet pages include the Strategy.* • *Member Development Steering Group is listed as a meeting on CMIS.* • *Copies of the notes from the MDSG are made available to Members on the Members Zone, CMIS and in the Member Development Folders* • *MDSG meets on a regular basis, dates included on CMIS.* • *Member Development Certificate of Commitment has been signed and is displayed in the Members' Area and in the Support Office (Leader and CEO)* • *Corporate Leadership Team (CLT) and Directorate Leadership Teams (DLTs) consulted and involved in the preparation of the Induction arrangements*	Green	Joanna Boaler	All requirements met

1.2. Councillor Learning and Development Policy **What this means in practice** The council has a written policy that has been distributed to all councillors, specifying the principles and operational procedures for councillor learning and development	• Statement of Commitment Policy easily accessible to members	*Evidence:* • *The formal ECC Member Development Strategy went to Full Council for agreement on 13/12/11* • *It is available on the Member Zone pages of the intranet, in the Members' Work Room, Group and Member Offices and with the Member Support Manager.* • *The policy has been revised throughout the year.*	Green	Joanna Boaler	All requirements met

1.3. Access to learning and development takes into account diversity of needs **What this means in practice** Political and managerial leadership can describe specific actions that they have taken to ensure equal access to learning and development opportunities for all councillors.	• Timing of events takes account of cultural and personal circumstances • Elected members confirm the action taken to ensure equality of opportunity to development • The development programme includes a range of delivery methods to meet the different learning styles of members	*Evidence:* • *Members were questioned at the start of their Term of Office about timings of meetings etc.* • *Sessions are scheduled to coincide, where possible with meetings where a number of Members are in attendance (Committee, Full Council, Group etc)* • *Use rooms which have hearing loops and have disabled access.* • *Use microphones when in CR1 or Council Chamber.* • *Try to use CR1 for most sessions.* • *We have used a mixture of briefing sessions, workshops, support sessions and e-learning within the development programme.* • *As part of the PDP process Members were asked if there we any barriers to attending these events.* • *We followed up individually with any Members who had only attended a few or no sessions during 2011 to learn more about the reasons.* • *As part of the Personal Development Planning (PDP) process at 1-1 session discussed preferred learning styles.* • *Advertise a start and approximate finish time for all sessions.* • *Evaluation of the rollout of Corporate Governance e-Learning modules went to the January 2013 MDSG.* • <mark>*Continue to ensure that the hearing loops are working in the rooms we use for these sessions*</mark>	Green On-going – Procedures have been put in place to stop them being turned off.	Joanna Boaler Joanna Boaler	All requirements have now been met

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1.4. Designated budget for councillor development **What this means in practice** The council has a designated budget for councillor development which is adequate to meet priority development needs.	• Budget is explicit and clearly identified and monitored	*Evidence:* • *There is a Member Support Budget for these activities. Joanna Boaler is a Level Four Approved Budget Holder within the Financial Scheme of Delegation.* • *Policy has been developed, agreed and circulated regarding Member attendance at external events to ensure equality of access and the budget is appropriately spent.*	Green		Budget in place
1.5. Officer support for councillors development **What this means in practice** Officer/ s of the council have responsibility for co-ordinating councillor development	• Members confirm that there is an officer who supports their learning	*Evidence:* • *Joanna Boaler is the Member Support Manager and is responsible for coordinating Member Development. Joanna Boaler is located near the Members' workroom and is known by Members.* • *There is an objective in the Member Support Managers My Performance relating to Member Development.* • *Joanna Boaler is a named contact in the Members' Handbook, Member Development Strategy, Contact Book, on the intranet and on the Member Development Folder in the Members' Workroom.* • *On the Member Development PDP questionnaires, Joanna Boaler is listed as the named contact.* • *The Member Support Managers job description explicitly outlines responsibilities in Member Development and with the Charter.* • *Joanna Boaler is the lead officer on the Member Development Steering Group as confirmed on CMIS.* • *Corporate Leadership Team (CLT) and Directorate Leadership Teams (DLTs) consulted and involved in the preparation of the Induction arrangements*	Green		Requirement met.

2. Strategic approach to councillor development					
Elements	**Specific Minimum Requirements for Charter**	**EVIDENCE / ACTION**	**BY WHEN**	**BY WHO**	**Update**
2.1 Councillor led strategy **What this means in practice** Representative councillors are involved in the formulation, implementation, monitoring and evaluation of councillor development strategies, possibly through an established all party task group or other all party committee	• Decisions about member development are taken by some form of formally constituted body of members • Strategy identifies priority development needs and makes stated and clear links with council's aims and objectives	*Evidence:* • *ECC has a Member Development Strategy approved by Full Council.* • *ECC has a cross party Member Development Steering Group approved by Full Council.* • *Joanna Boaler regularly reviews the Strategy in consultation with the Lead Member for Member Development to ensure it identifies the priority development needs and the links to the council's aims and objectives.*	Green	Joanna Boaler	
2.2. Councillor roles are clearly defined **What this means in practice** The various representative roles are clearly defined and councillors are able to describe how they contribute to the achievement of community, political and council objectives.	• Members demonstrate an understanding of the skills and knowledge required in their ward and council wide roles • Member role descriptions exist and are maintained for all key roles including ward councillor • Elected members are clear about what the council is trying to achieve and the part they play in this as councillors	*Evidence:* • *All Members have role descriptions - Part 2, Article 3 of the Constitution.* • *Members are required to complete an annual report.* • *Member briefings/discussions and development sessions are held on a regular basis to ensure Members are aware of what the council is trying to achieve and the role of Members in this.* • *Members are provided with a regular transformation update, monitoring officer and community budget update.* • *Scheduled as part of the induction programme.*	Green		Requirements met

2.3. Individual Learning and Development Plans **What this means in practice** The council has a structured process for regularly assessing councillors' individual learning and development needs based on focused objectives.	• System / process exists to identify individual development needs	*Evidence:* • *A record of Member attendance at Member Development sessions is kept and is available on the internet on CMIS, this forms part of the Member's Development Record.* • *Induction process – 1-1's undertaken after six months with new Members.* • *PDP questionnaires circulated to all Members with the offer of a 1-1.* • *The process and questionnaire are included within the Strategy.* • *In the induction meet and greet and drop-in opportunities are offered to all Members.* • *A selection of Members have been asked to complete a questionnaire regarding the PDP process.*	Green		PDP process and record of member attendance at sessions maintained

2.4. Political Leadership and Executive Team development and management **What this means in practice** The council has a structured process for assessing current and future leadership and Executive Team development needs. Development Programmes are put into Place.	• Published process to assess needs • Joint regular events/development plan that support the top team working together corporately & development	*Evidence:* • *Peter Martin (Leader) has a mentor -* Sir Merrick Cockell • *OPM worked with Political Leadership Team (PLT) and Corporate Leadership Team (CLT) between Oct 2010 and May 2011 on the following subjects: leadership styles, officer-member roles, commissioning cycles and devolution.* • *Facilitator appointed to support PLT and CLT with commissioning.* • *Individual Cabinet Members have undertaken training to meet their specific needs (example Derrick Louis)* • *Where changes in portfolio occurred, induction programme put in place for Cabinet Members (new and existing)* • *Facilitator appointed to support Cabinet Members* • *Induction checklist in place for new Chairman and Vice-Chairman* • *Support for Cabinet Member and Deputies to Cabinet Members to attend Leadership Programmes for portfolios* • Political Leadership Development Plan to be agreed and will be put in place after May 2013. • Working with HR who are developing a new leadership programme to see which elements would be applicable to Members following the election.	GREEN May 2013	Peter Fairley Joanna Boaler Joanna Boaler	

2.5. Committee Learning and Development **What this means in practice** The council has a structured process for assessing the learning and development needs of all of council committees	• Published system/process to identify needs • Feedback from Members to say it happens	*Evidence:* • *Sessions take place on specific subjects such as Waste Issues for D&R and Residential Home visits for COP in relation to committee work.* • *Development and Regulation Committee Training – monthly programme of training* • *Specific Board and Panel training such as Essex Pension Fund/ ISC and Appeal Panels* • *Overall Committee Development Plan agreed and will be put in place after May 2013.* • *Chairman (for committees) Development Plan produced as part of the PDP/Committee plans (Leadership link to 2.4).Roll out May 2013.*	GREEN	Colin Ismay Joanna Boaler	
2.6. Development opportunities are promoted and take into account access requirements. **What this means in practice** Councillors receive appropriate and adequate notice of development opportunities to allow them to plan in advance. Events are organised at various times, to allow for access by those with work or caring responsibilities. A range of methods are utilised to meet learning needs	• Timetable of learning opportunities that demonstrate events arranged at different times • Annual programme of development activities published and circulated to all councillors through a variety of channels • Members can give examples of how they receive appropriate and adequate notice of learning opportunities • Training programmes indicate development opportunities available at a range of times allowing access by different groups including those who work	*Evidence:* • *A timetable of advance dates is provided to Members.* • *Emails and reminder emails advertising the sessions.* • *Advertised in the Monthly Member Bulletin.* • *Snap frame posters in Members facilities.* • *Text message alerts* • *Shown on Member Board* • *Specific emails to groups/ individuals/committees* • *Group Offices' and Member Support contacts advised* • *At each session, the next session is advertised.* • *Sessions are held on different days and at a time when a significant number of Members are in County Hall.* *Action* • *Continue to explore new and innovative ways of disseminating the information to Members.*	GREEN On-going	MDSG/ Joanna Boaler	

2.7. Joint learning activities with officers, partners and the wider community. What this means in practice Councillors can provide examples of actions taken to encourage joint development opportunities with key partners, officers and community representatives to enhance closer working relationships and understanding	• Members can provide examples of elected members learning with, and from, others from stakeholder organisations • External partners are involved in relevant training sessions	*Evidence:* • *Since 2009, a few joint sessions have been held.* • *Speakers from outside the Council take part in sessions such as the Council Tax Benefits session.* • *Joint working has been established between Braintree District Council and Essex County Council.* • *Currently working with Colchester Borough Council to see how we can share information more/work together.* • *Others are invited to attend sessions where appropriate, such as the Police and Crime Commissioner Session – the Shadow Crime and Police Panel Members have been invited to attend.* • *Joanna Boaler is working with the region to establish further working together including a mentoring scheme and in how Members can work with faith groups more.* • *Joanna Boaler attends and participates in regional working and events on a regular basis.* • <mark>*To continue to explore opportunities for joint development opportunities*</mark> • <mark>*Undertake feasibility work of working with Districts/Boroughs/Unitaries in Essex after July 2013 – pilot with BDC.*</mark>	GREEN On-going July 2013		
2.8. Corporate Councillor Learning and Development Plan prioritising activities. **What this means in practice** Bringing together all learning and development plans – individuals, committees, political leadership and teams into a Corporate Plan that is able to prioritise activities according to resources and which links to council's aims & objectives and the development of elected Members.	• Corporate Learning and Development Plan	*Evidence:* *Action:* • <mark>Bring together all learning and development plans – individuals, committees, political leadership and teams into a Plan that prioritises activities according to resources and which links to council's aims and objectives and the development of elected Members.</mark>	RED Will take this forward following the elections in 2013.	Joanna Boaler	

2.9. Structured Induction process for all new councillors. **What this means in practice** Councillors who are new to the council and those who take on new roles receive structured and effective induction.	• Induction Strategy and programme of events • Induction programme for new councillors • Councillors can describe their induction processes, what they learned and how the learning has helped them to be effective in their role	*Evidence:* • *In 2009 a structured programme and timetable of events was offered to all new and returning Members.* • *The information has been stored and recorded for use in by-elections and will form the basis of the 2013 induction development.* • *Audited in 2009 on the induction programme – received a substantial assurance rating with several best practice marks.* • *Currently working on arrangements for 2013.* • *Draft programme and action plan has been developed for 2013 elections and induction. Initial discussions with MDSG, followed by paper to CLT (December 2013) and then paper to Executive Scrutiny Committee, Scrutiny Board and MDSG in January 2013.* • *All DLTs, Cabinet Office and Member Support and Executive Support Offices were consulted prior to the paper to CLT.*	GREEN	Joanna Boaler	All requirements met Dates mostly scheduled for the meetings.

2.10. Evaluation mechanisms that inform future plans. **What this means in practice** The council has systems in place that effectively evaluate councillor learning and development activity and identifies the benefits for individuals and the council and areas for improvement	• Top political and managerial leadership can describe how training and development is evaluated and who is responsible • Written up outline approach to evaluate elected member training and development with named member and officer responsibilities • Councillors can describe how learning and development is evaluated and who is responsible for ensuring the evaluations take place	*Evidence:* • *End of event and regular follow up is undertaken.* • *Annual Council Meeting a report on member development activities – July 2012* • *Development activities are recorded within Members' Annual Reports.* • *Overall evaluation report went to the August MDSG for consideration.* • *The approach to evaluation is included within the Member Development Strategy including responsibilities.* • *External evaluation undertaking as part of the External Event process.* • *Discussions at Member Development Steering Group – twice a year on the activities of the previous six months.* • *Feedback if provided to the lead officer/presenter and lead Member following each briefing/development session* • *Committee development to go on agendas as a standing item on a quarterly basis and more frequently as agreed by the scrutiny board.*	GREEN	Joanna Boaler MDSG	
2.11. Councillor Learning and Development Reference Group What this means in practice A cross party group of councillor's works with relevant officers to direct and support all councillor learning and development activity.	• Cross party Reference Group remit. • Reference Group minutes of meetings showing active involvement of councillors in the learning and development process.	*Evidence:* • *Member Development Steering Group is cross party.* • *The Group is supported by key officers – Member Support Manager and the Lead Officer for Scrutiny.* *(Terms of Reference)* • *The meeting is on CMIS* • *The notes of the meeting are available on the Member Zone intranet pages or from Joanna Boaler.*	GREEN		All requirements met

3. Learning and development is effective in building capacity					
Elements	**Specific Minimum Requirements for Charter**	**EVIDENCE / ACTION**	**BY WHEN**	**BY WHO**	**Update**
3.1 Councillors learn and develop effectively. **What this means in practice** Councillors have improved in their confidence and performance in their varied council roles to enhance the performance of the council.	• Examples of end of event questionnaires • Top political and managerial leadership are able to describe the improvements that training and development have brought to the performance of individuals, functions and the council • Members can describe why they did certain activities, what they learnt and what difference it has made to them carrying out their various roles as an elected member	*Evidence:* • *End of event questionnaires.* • *Induction evaluation report.- six monthly to MDSG* • *Annual report to Full Council* • *Annual reports*	GREEN		All requirements met
3.2 Learning is shared with other councillors and where appropriate, with officers and stakeholders. **What this means in practice** There is a mechanism for the dissemination of learning materials; knowledge exchange; case studies; Action learning, to encourage Capacity building in the council and a Learning Organisation culture.	• Elected members can describe how they have learnt from or shared their learning with their peers, officers and others	*Evidence* • *Copies of presentations and notes from the sessions are available in the Member workroom, from the Group Offices and the Member Support Manager.* • *Copies of presentations are on the Member Zone of the intranet.* • *Members who are unable to attend the session are provided with the notes and copies of the presentations on request* • *Update on the sessions in each Monthly Member Bulletin* • *Evaluation completed for all external events and materials, where appropriate collected and placed in the Members' Workroom* • *Notes produced after all Member briefing sessions and circulated with any materials to Members who were unable to attend.*	GREEN		All requirements met

3.3 Investment in learning and development is evaluated in terms of benefits and impact **What this means in practice**. The council demonstrates that it periodically evaluates the cost and benefits of councillor learning and development and the impact that it has had on performance.	• Evaluation strategy in place • Case studies of how learning and development has impacted on performance • Political and managerial leadership display a good understanding of both the costs and benefits of development activities and are able to explain why their commitment to councillor development is worthwhile	*Evidence:* • *See 2.10*	GREEN		All requirements met
3.4. Improvements to learning and development activities are identified and implemented **What this means in practice** Changes are made to learning and development programmes and activities to demonstrate the council's commitment to a continuously effective councillor learning and development programme	• Minutes of meetings, reports etc providing examples of improvements to learning • Top political and managerial leadership can demonstrate continuous improvement in the approach to developing people • Elected members and their representatives can describe what has been done to improve development activities whenever improvements were needed	*Evidence:* • *PDP process established* • *Evaluation process see 2.10* • *Presentations and sessions changed following feedback such as at the recent Code of Conduct sessions – slides were changed following the first session.* • *Induction see 2.9* • *PDP process feedback sought so improvements can be made following the elections in 2013.*	GREEN		All requirements met

4. **Supporting Councillors**					
Elements	**Specific Minimum Requirements for Charter**	**EVIDENCE / ACTION**	**BY WHEN**	**BY WHO**	**Update**
4.1. Council provides an appropriate level and range of support as well as assisting those with caring responsibilities. **What this means in practice** The council regularly assesses how it can assist councillors, particularly those with caring responsibilities in terms of suitable allowances and support	• Councillors Handbook includes arrangements that support those with caring responsibilities. • Top political and managerial leadership can give examples of how the council supports those with caring responsibilities • Members can give examples of how the council supports those with caring responsibilities • Elected members believe that the council is committed to supporting all councillors and particularly those with family and other caring responsibilities • All councillors have equal access to council premises, facilities and systems	*Evidence:* • *The Local Government Pension Scheme is available to all Councillors and advertised in the Member Handbook when they join the authority.* • *The Council has a Carer's allowance for Councillors, which is advertised to Members within the Handbook as above.* • *Members are provided with a Blackberry and VPN access and sundry items such as Business Cards, name badges.* • *Essex has an allowance scheme and Members can claim expenses.* • *The Council reviews its IT provision for Members.* • *Additional support is provided to Members with particular needs.* • *E-learning and e-payroll support sessions held.* • *Session start and approximate finish time are included in the invitations/advertising of the sessions to help Members make plans.* • *Sessions are held at different times of the day.* • *JB aware of Members disabilities/additional support needs. Support is offered. If we are informed in advance of their attendance we make necessary provision.* • *When holding sessions which are open to other Members we ask whether there are any additional support needs and make the necessary arrangements.* • *Handouts printed in a number of different sizes.* • *EIA carried out for the Member Development Strategy.*	GREEN		All requirements met

4.2. Council examines how council business is conducted to allow for equality of access to key political decision-making processes. **What this means in practice** The council regularly reviews how it conducts its business, in terms of when meetings are held and full access to meetings, so that councillors or potential councillors are able to take part in the democratic processes	• Council diary - times of meetings include both day and evening so that members can discharge their duties in such a way so as not to sacrifice family and employment responsibilities • Feedback from Members supports an equality of access approach • Council diary - scheduling meetings takes account of cultural and faith commitments	*Evidence:* • *A significant number of ECC Members are dual hatters or attend Parish Meetings so daytime meetings suit Members.* • *Members are advised of Council meetings well in advance.* • *Members are advised of the dates of Member Development Sessions well in advance.* • *Essex is such a large county, so sessions are scheduled to maximise attendance at sessions.* • *Local meetings are held in the respective locality areas.* • *As part of the PDP questionnaire Members are asked to confirm when they would prefer development sessions to be held.* • *In the Candidates Guide for prospective members we make it clear that the meetings will take place during the day.* *Action* • *Review to ensure that the Council diary still suits Members – discuss in PDP process.* • *Following the election ensure that Council scheduling takes account of any cultural and faith commitments of Members. – Members to be asked for their views as part of the PDP process.*	GREEN May 2013 following the elections.	 Joanna Boaler Colin Ismay	All requirements met

4.3. Council holds events for the community to encourage people to become future community leaders. **What this means in practice** The council actively encourages citizenship and publicises the role of councillors as community leaders as part of promoting local democracy and encouraging underrepresented groups to take up office	• Local democracy week action plan, programme of activities and review • Youth council • Citizenship links with local schools, colleges and universities • Prospective councillor events • Open days	*Evidence:* • *We produce a Candidates Guide for prospective Members.* • *We write to all prospective candidates (over 500 in 2009) advising them of the induction programme in advance.* • *We attend election counts to provide newly elected Members with a formal welcome and a letter regarding 'joining instructions' and induction.* • During LDW 2011, Members of the YEA met with PLT. Agreement was reached that members of the (Young Essex Assembly) YEA will have the opportunity to shadow members for the day. • YEA events – Members in attendance. • YEA Blog as regular guests within the Chief Executives Intranet Blog. • Preparation of Citizenship Lessons: Delivering Citizenship/ politics sessions in Great Baddow High School on 14/11/11 • LDW 2012: School Council and YEA day with Members, school visits by Members. Young people to shadow Members • Members invited to meet new YEA Members following the election. *Action* • Continue to organise these events and activities.	GREEN On-going		All requirements met

4.4 Councillors are provided with development and briefings to enable them to understand and fulfil their role in relation to community involvement and its impact on their wider role as councillors **What this means in practice** Council provides development and briefings on changing role of councillor in relation to the local community and provides councillors with the skills and understanding they need to meet this challenge	• Briefing / training sessions and materials are provided on topical issues • Councillors are actively engaged in community leadership activities	*Evidence:* • *Briefings and training sessions are provided to Members on topical issues.* • *Timetable of sessions* • *Member Development Week in March 2010 had a specific local focus.* • *Joint NI4 sessions in November 2010 with Districts/Boroughs.* • *Produced locality profiles based on Divisions.* • *Sessions organised on the Councils changing role and the impact that will have for residents.* • *New Residential Home visit programme session taken place and offered to Members locally.* • *Briefing sessions and written updates on the changes in the council particularly how it delivers services* *Actions* • *Consider, develop and roll out further locality sessions.* • *Finalise the revised Locality Profiles – 2013. Make available to Members and on the internet* • *Once the future direction is clear, provide information and discussions on how their role may change.*	GREEN On-going May 2013 ASAP	 MSOs Joanna Boaler	All requirements met
4.5 Councillors are provided with the skills to enable them to fulfil their role as leaders of an organisation and the community **What this means in practice** Councillors are developed so that they can play a full part in the debate /decision making process around increasing organisational effectiveness, productivity and efficiency, including providing challenge	• Councillors can provide examples of learning and development activities to support effective procurement decision-making	*Evidence:* • *Locality briefings* • *LDW activities* • *Sensory awareness training sessions offered* • *Regular sessions held on Community Budgets and Transformation*	GREEN	Joanna Boaler	All requirements met