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**North West
Employers**

SUPPORT. KNOWLEDGE. NETWORK.

COPELAND BOROUGH COUNCIL

**NORTH WEST CHARTER
ON MEMBER DEVELOPMENT**

LEVEL ONE REVIEW

VERIFICATION VISIT

ON

11 September 2012

Copeland Borough Council

North West Charter on Member Development

Verification Visit

Verification visits to authorities are undertaken by an elected member and an officer. On this occasion Councillor Trevor Holt, Bury Metropolitan Borough Council and Councillor Mike Wharton, North West Employers, conducted the verification visit.

The purpose of the visit was to verify the information submitted by the Authority in their portfolio presented for assessment for the Charter on member development.

The format of the visit was three, forty five minute face to face interviews with elected members and officers from the local authority. Whilst the content of the individual interviews is confidential, the information gathered has been used to support the submission made by the Local Authority.

The following people were seen during the visit:

Councillor Lena Hogg	Chair of Member Development Panel
Councillor David Riley	Deputy Chair of Member Development Panel (New Member)
Clive Willoughby	Democratic Services Officer
Darienne Law	Head of Corporate Resources
Councillor Elaine Woodburn	Leader of the Council
Paul Walker	Chief Executive
Councillor Ian Hill	Newly Elected Member
Councillor Gillian Troughton	Randomly Selected Member
Councillor Sam Pollen	Newly Elected Member
Councillor Yvonne Clarkson	Randomly Selected Member
Councillor Geoff Garrity	Randomly Selected Member
Councillor Joan Hully	Randomly Selected Member

Thanks to all those above who gave their time so generously on the day.

STATEMENT	ASSESSORS' COMMENTS
<p>1. Having a Statement of Intent</p>	<p>Copeland Borough Council has restated its commitment to the principles of the North West Charter with its current Leader and Chief Executive signing the declaration. It was presented to full Council in June 2012 with the revised Member Development Strategy.</p> <p>The lead on member development is taken by a cross-party Member Development Panel. To ensure that member learning is kept high on the agenda within the Council the Portfolio Holder for Performance and Transformation, currently Councillor John Bowman sits on the panel and plays a very active part in promoting member development.</p>
<p>2. Ensuring that all members are made aware of learning and development opportunities</p>	<p>There is a full induction programme for new members and it is reviewed by the Member Development Panel. The Council has followed good practice in working with Allerdale Borough Council to share part of the programme.</p> <p>Members and officers of both Councils have joint training which features introductions to Local Government and overview and scrutiny. These are spread over four different training modules. There is an excellent member development newsletter produced by Democratic Services which updates members on a large number of matters including opportunities for learning. This is further supplemented by the training and awareness sessions being scheduled on the weekly list of meetings and also via the Chief Executive's Weekly Members' Update.</p> <p>The Council over the last twelve months</p>

	has done extremely well in encouraging members to attend development events with 48 out of 51 members (94%) having taken an opportunity to further their knowledge. The cross party group of members have continued to meet on a regular basis.
3. Having a process to identify individual development needs which involves members	<p>The Council has a good track record in getting members to participate in the completion of Personal Development Plans (PDPs). In June/July 2011 50 out of 51 members took time out to complete a review of their development needs. To achieve this level of participants in PDPs is outstanding.</p> <p>For 2012 the process is being refreshed (maybe to get 100%). Trained facilitators were recruited to actually support members in the process with one-to-one interviews being organised. There was an Executive Report to full Council from the Performance and Transformation Portfolio Holder advising that the programme for learning for the next six months i.e. September 2011 to March 2012 had been compiled as a result of information taken from an analysis of the needs identified by members. The members' panel sets the programme and reviews the training offered at its regular meetings to ensure it meets the most up to date requirements of members.</p>
4. Having an officer allocated to assist members and groups in identifying needs and providing information on resources	Tim Capper, Democratic Services Manager, has specific responsibility for member development. He is supported by Clive Willoughby and their contact details are made available to members via the weekly bulletins and member development newsletters. They both attend and support the Member Development Panel meetings offering support and advice when required. There is a revenue budget for member development of £20,600 plus a provision

	of £25,000 for member development within The Council's 'Choosing to Change' improvement programme.
5. Having a strategy to meet the learning and development needs of members	<p>A revised strategy has recently been approved by the Council (June 2012). This was the culmination of a review led by the Member Development Panel. There are clear links and references to the corporate aims of the Council with the specific goal of 'delivering excellent and value for money services' being at the heart of member development. The objective of "maintaining a skilled, adaptable and productive workforce led by effective leading members and a strong and high performing management team" fits very closely with the member development strategy.</p> <p>The Panel assesses member development at its meetings with information being made available from evaluation forms completed after each event. This form has recently been updated to glean from members how the particular development opportunity has helped them in their Ward work. It was also encouraging to note that the Panel is pro-active in assessing member development requests outside of the agreed programme. In recognition that there is a need to ensure that there is value for money in training members there is a training assessment form that scores the particular development request against how it meets the themes in the Council's Corporate Plan.</p>

Continuous Improvement

Although the purpose of the visit was to assess the submission for the Charter, it was also an ideal opportunity to discuss what improvements the Authority would hope to make within the next three years.

All those interviewed were asked at the end of their interview what improvements they could suggest. It is important to note that everyone who was interviewed all expressed the view that the Council offered excellent support to its members and felt that the Council just needed to continue doing what they had done over the last few years. There were a few comments on possible areas for improvements over the next three years. They are recorded below to act as a reference point when the Charter is re-assessed in three years.

As training and development for members improve, there are fewer suggestions as the members feel that everything they consider reasonable is already being provided. This has appeared to be a recent trend over the last year or so.

- Support for members will need to be focussed on how members' roles will change as the role of Local Government evolves
- There is a role for North West Employers to look at doing more learning events in Cumbria as it is too costly and time consuming to travel outside of the area
- Consideration to be given as to how members can better support their ward/community. As Council services change so too will the role of the member and there will be a need to develop the members in community leadership, skills of engagement and equip them to manage expectations of residents and ensure they understand the changing council policies so that they can explain them to members of the public
- Improve the evaluation of events and really find out from members what they have learnt from training. Is the Authority getting value for money?
- Members commented that they would like to learn about finance to have greater understanding of the economic difficulties the authority faces and also to enable them to contribute more effectively to the budget deliberations

Special Mention

The intention of the Charter is to encourage Local Authorities to adopt the five key practice points within the standard framework but we hope to encourage and celebrate innovation and excellent practice.

Where we have found 'little gems' through the portfolio or interviews, we will take the opportunity to share these examples and give positive feedback to the Authority:

- There is a strong culture within the Organisation for member learning which is demonstrated by 50 out of 51 members having a personal development plan and 94% of members engaging in learning – outstanding
- The practice of allocating member and officer mentors to new members allows the member to move into the role knowing that support and help is always available.
- All members referred to the member development newsletter which is seen as an important communication that keeps them up to date on a whole range of matters and specifically their development.
- The Authority works hard to ensure that the different learning styles of members are catered for. E-learning is an area that is currently being investigated.
- The sharing of the induction programme with Allerdale Borough Council was an excellent example of how councils can work together.
- The Member Development Strategy had strong links to the Council's priorities and this was further demonstrated with the assessment form used for members' training requests. Members, when requesting attendance at conferences and/or learning and development events, complete a request form that is assessed against a scoring system that links directly to the council's objectives. All members considered this as an equitable way to decide on the suitability of the training.

Assessors' Comments

Overall, the Council continues to make a clear commitment to the development of its elected members which was evident from the information provided on the e-tool and visit. As part of the Authority's continuous improvement process, the assessors felt that the Authority's member development could be strengthened in the following areas:

- Copeland Borough Council is in a strong position to face the challenges it faces going forward with recognition from the leadership and the members themselves that the role of the member will change. The Council has a strong member learning team both officers and members which will stand them in good stead to face the turbulent times ahead

Recommendation from the Verification Team

Having reviewed all the evidence, it is our view that Copeland Borough Council continues to meet the standards set out in the North West Charter on Member Development.

Signed: _____

**Councillor Mike Wharton
North Western Local Authorities' Employers' Organisation**

Signed: _____

**Councillor Trevor Holt
Bury Metropolitan Borough Council**