

BRIDGEND COUNTY BOROUGH COUNCIL
REPORT TO THE DEMOCRATIC SERVICES COMMITTEE

17 APRIL 2013

REPORT OF THE ASSISTANT CHIEF EXECUTIVE – LEGAL & REGULATORY SERVICES

PERSONAL DEVELOPMENT REVIEWS

1. Purpose of Report

- 1.1 The purpose of this report is to present the Democratic Services Committee with proposals for :
- the introduction of a Personal Development Review (PDR) process that will be made available to all Elected Members;
 - 3 template options for consideration to be used during the PDR discussion;
 - the Personal Development Review process to be recommended to Council for approval at its meeting on 1 May 2013.

2. Connection to Corporate Improvement Objectives/Other Corporate Priorities

- 2.1 Elected Members have a wide range of roles and responsibilities that they are expected to undertake. The PDR process will assist Elected Members to identify any support that may be required to fulfil these roles effectively.
- 2.2 Elected Members who are able to attain the appropriate level of knowledge, skills and experience identified during the PDR process will be able to fulfil their roles and work towards the achievement of all the Corporate Priorities.

3. Background

- 3.1 At its last meeting on 31 January 2013 the Democratic Services Committee recommended to Council that a submission be made for the Standard Charter award as part of the WLGA Charter for Member Support and Development. The report identified the need to provide a PDR process which could be offered to all Members and that must be undertaken by all Senior Salary holders in order to achieve the WLGA Charter. This recommendation was approved by Council on 6 March 2013.
- 3.2 Subsequently the Head of Democratic Services and the Training & Development Officer consulted with representatives of the WLGA and other local authorities in Wales to determine a suitable PDR process to be adopted in Bridgend.

4. Current situation / proposal

- 4.1 The key elements of the PDR process as identified in the Local Government (Wales) Measure 2011 intend that:
- 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 about the training and development needs of a member of a local authority.

4.2 Effective use and completion of the PDR process will enable this Authority to meet its requirement in accordance with the Measure and “secure the provision of reasonable training and development opportunities for its members”. In addition to this requirement, the WLGA Charter has determined that all senior salary holders must undertake the PDR process.

4.3 It is proposed that the interview part of the PDR process will be undertaken by suitably trained Elected Members, who understand the detailed roles and responsibilities of other Elected members. There is also scope for appropriate officers to be utilised to undertake interviews for the smaller groups and lone members if necessary.

4.4 The following 3 PDR interview templates options are proposed for consideration:

- Comprehensive Personal Development Review Document - Appendix 1
- Intermediate Personal Development Review Document - Appendix 2
- Personal Development Review Document - Appendix 3

4.5 Personal Development Review Documents

4.5.1 Comprehensive Personal Development Review Document

This document is similar to the version that has been considered by the WLGA as the all-encompassing review document . As the title indicates, it covers every eventuality for personal development. To use this form would require a full understanding of each of the headings by the reviewee and an almost professional skill for the reviewer to fully explore the developmental needs of an individual to complete the form. The form also leads the reviewee to identify a general and extensive “wish list” of learning opportunities and support that in the current economic environment are unlikely to be provided. The levels of training required to facilitate this process would be onerous and this could not be achieved within the timescale required for the successful submission of the WLGA Charter Award later this year.

4.5.2 Intermediate Personal Development Review Document

This document is a précised version of the comprehensive document. Although it reduces some of the depth of the PDR interview, it still provides a significant technical challenge for the reviewers and is likely to be time consuming. It is considered that this also maintains the need for a “professional reviewer” being able to guide the PDR interview. With the intention for the process to be undertaken as a peer review, it is unlikely given the complexity of the form and the training and time required to successfully complete the interviews that the process could be achieved within the planned timescale. This form again steers reviewees towards a “wish list” of learning and support activities which may not be deliverable.

4.5.3 Personal Development Review Document

This is a simplified version of the previous documents and is the preferred option for use. It has a simpler format which enables the reviewee to reflect on those activities where they have made good progress in the past year and identify those aspects of their role where additional support is needed. The focus of this form is

on the individual and their role. Member Role Descriptions provide the framework for the skills knowledge and experience that is required to fulfil an individual's role(s) which is then developed during the discussion process into a personal development plan. The reviewer does not need a "professional level" of interviewing skills to undertake the review discussion. This will reduce the training burden and optimise the opportunities to create a wider pool of Elected Members able to undertake the review. This version of the review document is considered as an ideal starting point for achieving the successful introduction of the PDR process. It should be noted that this format can be enhanced in the future, by utilising the lessons learned and practical experience gained from the review process.

4.6 PDR Process

4.6.1 It is proposed that the following process be undertaken to introduce PDR's:

- Political groups identify suitable members to undertake the role of PDR reviewers
- Reviewers and reviewees undertake training in the PDR process
- Groups/individuals to map reviewees to appropriate reviewers
- PDR discussions are scheduled and agreed between reviewers and reviewees
- Reviewees draft their PDR form using their Role description portfolios for reference prior to their PDR discussion
- The PDR discussion is held and the reviewees PDR Form is updated and signed
- A copy of the PDR document is passed to the Head of Democratic Services
- The Head of Democratic Services will arrange appropriate support or training to meet the needs of members within the available budgetary and time constraints.

4.7 Training

4.7.1 To facilitate the successful introduction of the PDR process training sessions will be provided for the reviewees and separately for the reviewers.

4.7.2 The reviewee training will outline the use of the individual's Role Description Portfolio to clarify the various roles they are expected to undertake. They will be advised regarding methods to successfully reflect on their achievements and to identify those areas that require additional support. The training will then cover how the PDR form should be completed and how to begin their own personal development plan in preparation for the discussion stage of the process. Reviewees will be advised of what will be expected during the discussion stage of the review and the assistance that can be provided by the reviewer to complete the personal development plan and the PDR process

4.7.3 Reviewer training will include an outline of the training provided to the reviewees but in addition they will be guided in the format of the discussion. They will be informed of how to complete the form including the personal development plan and the actions required to inform the Head of Democratic Services that the PDR process has been completed. The reviewers will also have to provide a copy of the review form and the personal development plan for recording and for collation into the future member development programme or to provide appropriate support to the individual member as required.

4.8 Identification of Reviewers

- 4.8.1 It is proposed that the responsibility for identifying those Elected Members that will act as reviewers will be undertaken by each of the political groups. It will also be for the political groups to determine how they wish to pair or match reviewers and reviewees within their group
- 4.8.2 Group Leaders to are requested to liaison with the Head of Democratic Services regarding their preference of a reviewer to undertake their PDR.
- 4.8.3 To assist this process a suggested option for the identification of reviewers is shown at Appendix 4. This is not a definitive list but provides a range of options which can be tailored to suit the needs of the Political Group and the individuals concerned.
- 4.8.4 It would be anticipated that the reviewees have the opportunity to select a reviewer of their choice who would be able to provide the necessary guidance and support during the PDR process.

4.9 Timescales

- 4.9.1 To meet the deadlines for the submission for the WLGA Charter, the approval of the PDR process, its implementation and the successful completion of PDRs for the Senior Salary Holders it is proposed that the following activities and timescales be met

Task	Completed by
• PDR Process submitted for approval to Council	01 May 13
• Reviewers Identified	07 May 16
• Training for use in the PDR process	31 May 13
• PDR for Senior Salary Holders completed	26 Jul 13
• PDR for all members completed	30 Aug 13

5. Effect upon Policy Framework & Procedure Rules

- 5.1 There is no effect on the Policy Framework and Procedure Rules.

6. Equality Impact Assessment

- 6.1 There are no equalities implications in respect of this report.

7. Financial Implications

- 7.1 All activities described in this report will be met from existing budget provisions.

8. Recommendation

- 8.1 It is recommended that the Democratic Services Committee:

- (i) select one of the Personal Development Review documents (attached as Appendices 1,2 and 3) as the vehicle for commencing the PDR process in Bridgend County Borough Council;

- (ii) approve the proposed activities and timescale as shown at paragraph 4.9.1 of this report;
- (iii) confirm that the proposed PDR Process be recommended to Council for approval and implementation as outlined in the report for its meeting on 1 May 2013

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08 Apr 2013

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Background documents – None

Comprehensive Personal Development Review Document

Please complete this pro forma and bring it to the meeting, this form is confidential to you and the person who is conducting your review except for the final sheet which will be used by the Head of Democratic Services.

1. What are my current roles and responsibilities? (e.g. the council executive/cabinet, overview and scrutiny member, chair, member of a statutory committee such as planning, licensing etc. In the community, ward member community leader)

2. What specific tasks to I need to achieve this year?

What do I plan to do? By when?

3. What do I need to know about and be able to do to undertake my roles effectively? (Your role description, person specification and the member development framework/ questionnaire may help you here)

4. What aspects of my role am I confident in?

5. Where am I less confident?

6. What might prevent me from undertaking my role effectively? (consider any personal, organisational or political issues which might be a barrier to success)

Areas that I would like to develop are:	Preferred method of development (e.g. visits to other authorities, peer networking, practical workshops, e learning etc.)
Skills (e.g. meeting management, questioning techniques, media interviews,	
Knowledge (e.g. the code of conduct, equalities, the planning process, local policy etc.)	

Personal Development Plan

This section of your pro forma can be discussed with the Head of Democratic Services, and it will be used to inform development plans and support offered

Area for Development	How	Priority
<i>example</i> <i>How to Chair scrutiny meetings effectively</i>	<i>Observation of external meetings</i> <i>Workshop on Chairing Skills</i> <i>Authority guidance for Scrutiny chairs</i>	1
<i>example</i> <i>Understanding of the planning system to answer constituents enquiries</i>	<i>Introduction to planning workshop</i> <i>Meeting with planning officers on specific issues</i>	3
<i>example</i> <i>Local Government Finance, how do I contribute to the budget setting process?</i>	<i>Induction workshop in finance</i> <i>Discussions with Finance officers</i> <i>Mentoring from Cabinet member for Finance and Resources</i>	2

Please be aware that any requirements identified by individual members during the Personal Development Review are not guaranteed to be made available in the forthcoming council year.

Intermediate Personal Development Review Document

Please complete this pro forma and bring it to the meeting, this form is confidential to you and the person who is conducting your review except for the final sheet which will be used by the Head of Democratic Services.

1. What are my current roles and responsibilities? (e.g. the council executive/cabinet, overview and scrutiny member, chair, member of a statutory committee such as planning, licensing etc. In the community, ward member community leader)

2. What specific tasks to I need to achieve this year?

What do I plan to do?	By when?

3. What might prevent me from undertaking my role effectively? (consider any personal, organisational or political issues which might be a barrier to success)

Areas that I would like to develop are:	Preferred method of development (e.g. visits to other authorities, peer networking, practical workshops, e learning etc.)
Skills (e.g. meeting management, questioning techniques, media interviews,	
Knowledge (e.g. the code of conduct, equalities, the planning process, local policy etc.)	

Personal Development Plan

This section of your pro forma can be discussed with the Head of Democratic Services, and it will be used to inform development plans and support offered

Reviewee Name (Print): _____ Reviewer Name (Print) _____

Area for Development	How	Priority
<i>example</i> <i>How to Chair scrutiny meetings effectively</i>	<i>Observation of external meetings</i> <i>Workshop on Chairing Skills</i> <i>Authority guidance for Scrutiny chairs</i>	1
<i>example</i> <i>Understanding of the planning system to answer constituents enquiries</i>	<i>Introduction to planning workshop</i> <i>Meeting with planning officers on specific issues</i>	3
<i>example</i> <i>Local Government Finance, how do I contribute to the budget setting process?</i>	<i>Induction workshop in finance</i> <i>Discussions with Finance officers</i> <i>Mentoring from Cabinet member for Finance and Resources</i>	2

Please be aware that any requirements identified by individual members during the Personal Development Review are not guaranteed to be made available in the forthcoming council year.

Personal Development Review Document

Reviwee: _____

Reviewer: _____

Please complete this pro forma and bring it to the review meeting. This form is confidential to you and the person who is conducting the review, although it will be used by the Democratic Services Team to collate group activity where appropriate

1. What has worked well for me this year? (eg: contributing to full council meetings, attending planning meetings, being part of a scrutiny committee, working in my ward to support the needs of my community)

2. What do I need to concentrate on in order to maintain or improve my performance?

Personal Development Plan

This section of your pro forma can be discussed with the Head of Democratic Services, and it will be used to inform development plans and support offered

Reviewee Name (Print): _____ Reviewer Name (Print) _____

What do I plan to do?	By When?	Support Required (if appropriate)

Reviewee's Comments	Reviewer's Comments

Reviewee Signature: _____

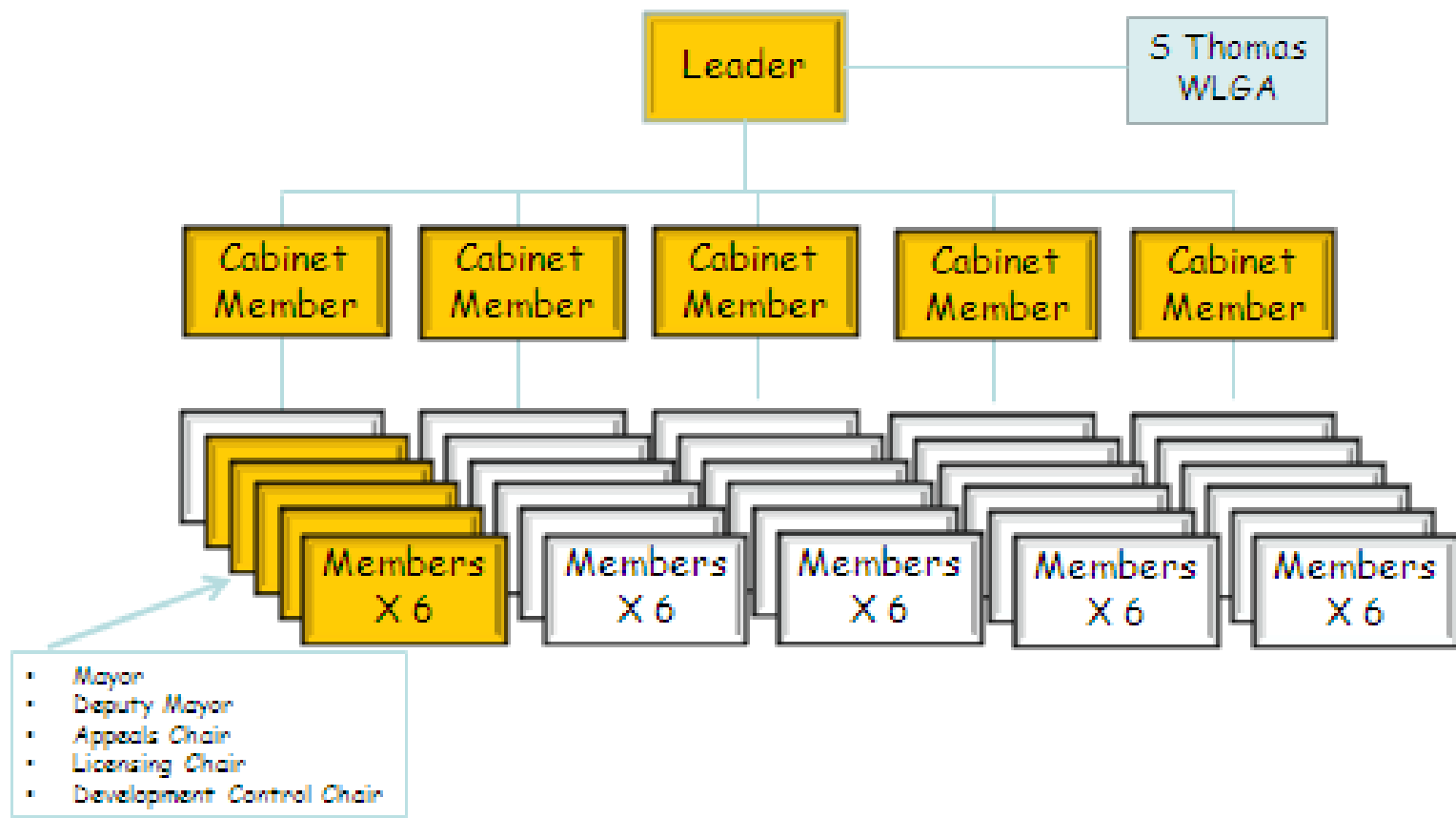
Reviewer Signature: _____

Date:

Date:

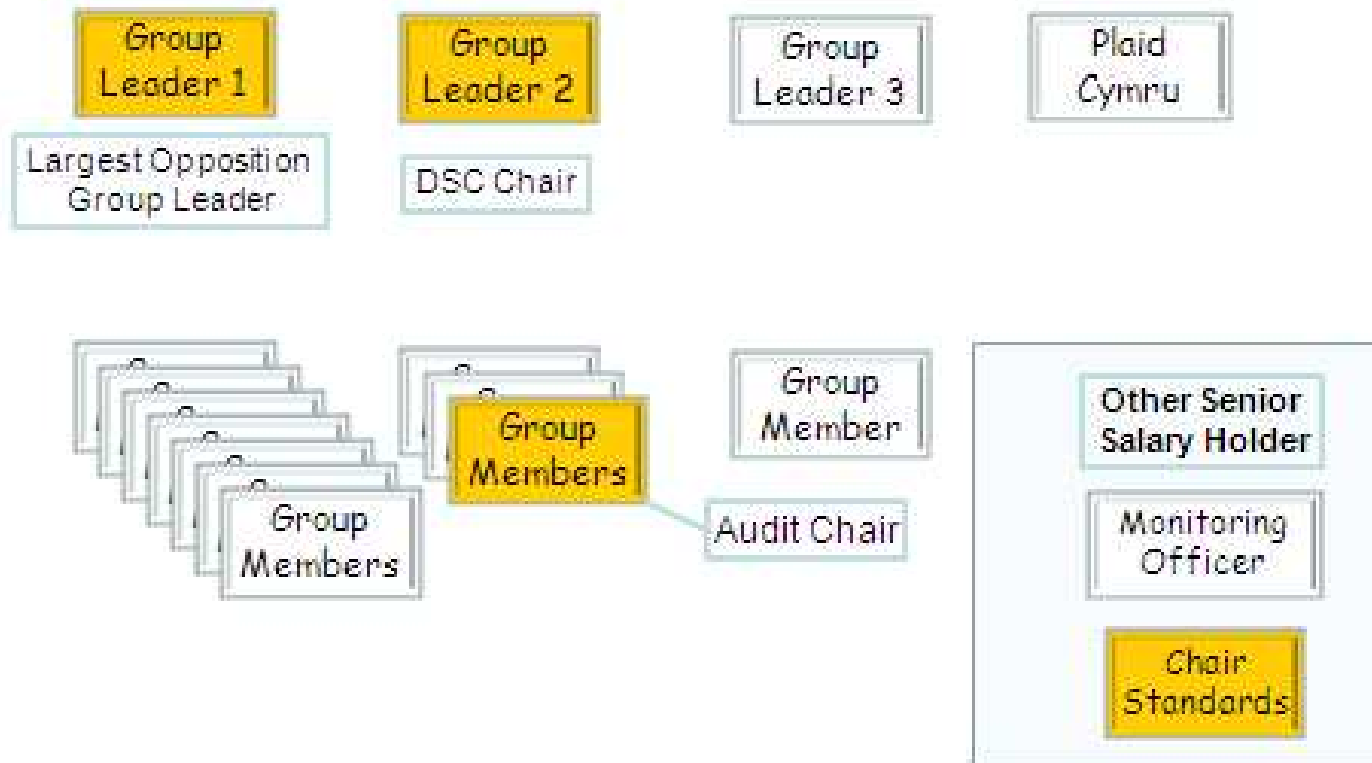
SUGGESTED REVIEWER OPTIONS

Leading Group



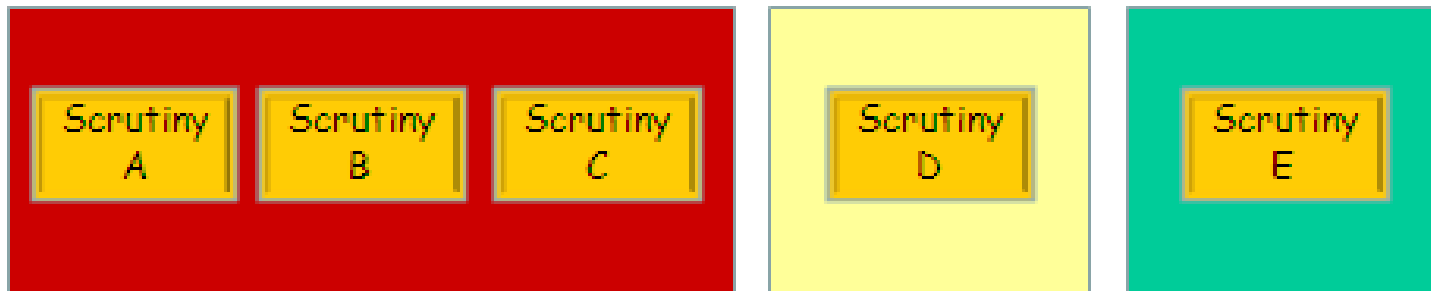
OTHER POLITICAL GROUPS

Other Groups



SCRUTINY CHAIRS

Scrutiny Chairs



Options:

1. Peer to Peer
2. Senior Representative from Group
3. External Representative
4. Combined
5. Cabinet/Leader (If appropriate)