

**BRIDGEND COUNTY BOROUGH COUNCIL**  
**REPORT TO THE DEMOCRATIC SERVICES COMMITTEE**

**17 JANUARY 2018**

**REPORT OF THE CORPORATE DIRECTOR OPERATIONAL AND PARTNERSHIP  
SERVICES**

**REVIEW OF THE PERSONAL DEVELOPMENT REVIEW (PDR) PROCESS**

**1. Purpose of Report**

- 1.1 The purpose of this report is to present the Democratic Services Committee with proposals for :
- a Personal Development Review (PDR) process that will be made available to all Elected Members;
  - the Personal Development Review process to be recommended to Council for approval at its meeting on 28 March 2018.

**2. Connection to Corporate Improvement Objectives/Other Corporate Priorities**

- 2.1 Elected Members have a wide range of roles and responsibilities which 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. Attaining the appropriate level of knowledge, skills and experience identified during the PDR process will enable them to fulfil their roles and support the achievement of all of the following Corporate Priorities:

1. **Supporting a successful economy** – taking steps to make the county a good place to do business, for people to live, work, study and visit, and to ensure that our schools are focused on raising the skills, qualifications and ambitions of all people in the county.
2. **Helping people to be more self-reliant** – taking early steps to reduce or prevent people from becoming vulnerable or dependent on the Council and its services.
3. **Smarter use of resources** – ensuring that all its resources (financial, physical, human and technological) are used as effectively and efficiently as possible and support the development of resources throughout the community that can help deliver the Council's priorities.

**3. Background**

- 3.1 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.

3.2 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.

3.3 At its meeting on 6 September 2017 Council approved that a submission be made to the Welsh Local Government Association (WLGA) for the Charter for Member Support and Development. The report identified that one of the criteria for achieving the Charter was the need to provide a PDR process which could be offered to all Members and which must be undertaken by all Senior Salary holders.

3.2 A PDR process has previously been put in place and this has now been reviewed by the Head of Democratic to ensure that it remains fit for purpose.

#### **4. Current situation / proposal**

##### Personal Development Review Documents

4.1 The following 3 PDR interview templates options which were considered during the last administration have been reviewed and updated:

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

##### 4.1.2 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.

##### 4.1.3 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 technical challenge for the reviewers and is likely to be time consuming. It is considered that this also maintains the need for a “trained reviewer” being able to guide the PDR interview.

##### 4.1.4 Personal Development Review Document

This is a simplified version of the previous documents. 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.

4.1.5 In 2013 Council approved the Personal Development Review Document as it was considered as the most appropriate for use with Elected Members. However, some of the feedback from the PDR process indicated that the form did not provide sufficient value to those involved in the process to take ownership of their personal development. Therefore all 3 forms have been reviewed with the intention to be re-considered for future use with the PDR process.

## 4.2 PDR Process

4.2.1 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
- Political groups/individuals to map reviewees to appropriate reviewers
- PDR discussions are scheduled and agreed between reviewers and reviewees
- Reviewees draft the 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.

## 4.3 Training

4.3.1 To facilitate the successful introduction of the PDR process training sessions will be provided.

4.3.2 The reviewee training will outline the use of the individuals 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

4.3.3 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.

#### 4.4 Identification of Reviewers

- 4.4.1 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. It is hoped that there would be a ratio of 3 reviewees to 1 reviewer but it is suggested that no more than 6 reviewees be matched to a reviewer.
- 4.4.2 Group Leaders are requested to inform the Head of Democratic Services of the nominated reviewers to undertake their PDR reviews. This will enable training to be identified for the relevant Elected Members.
- 4.4.3 It is 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.

#### 4.5 Timescales

- 4.5.1 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	28 Mar 18
Reviewers Identified	16 May 18
Training for use in the PDR process	31 May 18
PDR for Senior Salary Holders completed	29 Jun 18
PDR for all members completed	31 July 18

### 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 progressing the PDR process in Bridgend County Borough Council;
- (ii) approve the proposed activities and timescale as shown at paragraph 4.8.1 of this report;

- (iii) confirm that the proposed PDR Process will be recommended to Council for approval and implementation as outlined in the report for its meeting on 28 March 2018.

**P A Jolley**  
**Corporate Director Operational and Partnership Services**  
**10 Jan 18**

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**Background documents** – None