Criterion 1. There is a clear commitment to councillor development and support

Element 1.1 Political and managerial leadership is committed to the development of councillors

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| Requirements for Charter | Requirements for Charter Plus | Examples of evidence | Your evidence | Action | By when and by whom |
| * Clear commitment from the top political and managerial leadership * Cross-party councillor development group that meets regularly * Clear councillor development strategy which is embedded into practice and regularly reviewed * Named councillor/s and officer/s responsible for councillor development | * Clear commitment from top political and managerial leadership to share development opportunities across local government tiers (including with parish and town councils) * Strategic approach to forward planning of councillor development and succession planning | * Signed commitment to achieving the charter * Councillors are included in any Investors in People (IiP) Award questioning process * Strategies are in place to support councillor development and succession planning * Cross-party councillor development group showing active involvement of councillors in the learning and development process |  |  |  |

Element 1.2 The council actively promotes democratic participation, publicises the role of councillors as community leaders, and proactively engages with under-represented groups

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| Requirements for Charter | Requirements for Charter Plus | Examples of evidence | Your evidence | Action | By when and by whom |
| * The council holds a range of activities and events to encourage people to become councillors | * The council collects data on the make-up of existing elected members and understands where under representation occurs, compared to the make- up of the local population. This data is used to inform targeted campaigns to increase representation from these groups * The council takes action to encourage people to become councillors, particularly from under-represented groups and evaluates the impact and success of the activities * The council provides guidance and information on democratic and electoral processes * The council builds links with local businesses and employers to promote the role of the councillor * Councils run coordinated media campaigns and uses a number of channels to promote the role of councillor | * Data and intelligence is held on the diversity of existing elected members in the borough. * Local democracy week action plan, programme of activities and review * Youth council * LGA’s Be a Councillor campaign * Citizenship links with local schools, colleges and universities * Presentations in the community and events to targeting under-represented groups * Presentations in the community and events to targeting under-represented groups * Prospective councillor events and materials on roles, responsibilities and next steps * ‘Day in the life of a councillor’ * Social media plan in place to raise the profile of becoming a councillor |  |  |  |

Element 1.3 The council is committed to ensuring equal access to learning and development for all councillors

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| Requirements for Charter | Requirements for Charter Plus | Examples of evidence | Your evidence | Action | By when and by whom |
| * Statistical analysis of cultural and personal circumstances * Timing of councillor development takes account of cultural and personal circumstances * All councillors have equal access to development * The development programme includes a range of delivery methods to meet different learning styles * Councillors are regularly updated on councillor development activities * Access to existing and/or necessary new learning continues in challenging times or disruption to business as usual | * Impact of analysis of access is monitored, reviewed and actioned * The council undertakes a regular survey of all elected members, post elections, to understand accessibility requirements and ensure equality of access can be maintained * The council puts in place reasonable adjustments for councillors with specific needs related to their characteristic group | * Statistical evidence of attendance * A range of learning and development options to meet individual needs are provided and promoted – and these are resilient in challenging times or disruption to business as usual * A range of communication methods eg internet/intranet/ social media is used to promote development opportunities * Councillors confirm that action is taken to respond to and accommodate diversity of needs * Evidenced flexibility and consideration of the timing of development events * Evidenced of reasonable adjustments for individuals tailored to their personal circumstances is held and regularly refreshed by the council |  |  |  |

Element 1.4 The council has designated resource and budget for councillor development which is adequate to meet priority development needs

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| Requirements for Charter | Requirements for Charter Plus | Examples of evidence | Your evidence | Action | By when and by whom |
| * Appropriate and adequate officer resources are in place to support councillor development * Budget is explicit and clearly identified and monitored | * Councillor development and support staff have their own skills development programme * The officer/s are involved in regional and national learning networks to support continuing professional development (CPD) * The budget is properly reviewed, set and prioritised by the cross-party councillor development group * The council maximises the information shared with councillors on LGA and other organisations, including resources, networks, development programmes and toolkits to increase take up and access to development opportunities * The council promotes a wide range of LGA free resources for councillor development, for example the [LGA Local Leadership Framework](https://www.local.gov.uk/publications/local-leadership-framework-councillors) (building on Political Skills Framework and The 21st Century Councillor) and online [councillor workbooks](https://www.local.gov.uk/our-support/councillor-and-officer-development/councillor-workbooks) | * Officer/s job descriptions * Named officer/s in information distributed to councillors and staff * Councillors are able to name the officer/s * The officer/s are able to demonstrate their understanding of learning and development in a political context * Cross-party councillor development group terms of reference and active involvement of councillors in the learning and development process demonstrated * Budget reports * Information that informs councillors of the existence of the budget * Minutes of meetings that shows councillors’ involvement in setting and monitoring the budget * Councillors confirm that the budget is sufficient to meet priority current and future development needs * Monitor take up of LGA and other offers by councillors on an annual basis |  |  |  |

Criterion 2. The council has a strategic approach to councillor development

Element 2.1 The council has a councillor development strategy in place

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| Requirements for Charter | Requirements for Charter Plus | Examples of evidence | Your evidence | Action | By when and by whom |
| * The strategy is developed and monitored by the cross-party councillor development group * Strategy identifies priority development needs and makes stated and clear links with council’s corporate/strategic objectives as well as risk management processes for challenging times or disruption to business as usual * The strategy is regularly reviewed (at least once every three years) by the cross-party councillor development group * The strategy includes an induction process that is evaluated after each election | * The cross-party councillor development group leads the evaluation of the strategy and implements improvements * The cross-party councillor development group is able to evidence engagement with a wide range of members, in different roles from frontline to strategic roles, in the formulation of the strategy | * Councillors engagement plan in place for the formulation or refresh of the strategy * A strategy is in place * Notes of councillor development meetings showing monitoring and evaluation of the strategy * Councillor development group demonstrates their involvement in formulating the strategy * Overview and scrutiny review of the effectiveness of the strategy * Those involved in formulating the strategy can demonstrate how it links to the corporate/strategic objectives and the rationale behind stated priorities |  |  |  |

Element 2.2 The council has a structured process for regularly assessing councillors’ individual learning and development needs based on focused objectives

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| Requirements for Charter | Requirements for Charter Plus | Examples of evidence | Your evidence | Action | By when and by whom |
| * A process exists to identify individual, or group development needs in the form of a Training Needs Analysis (TNA) or Personal Development Plans (PDP) and is working effectively * The council is able to quickly to assess any new and different needs in challenging times or disruption to business as usual, and be able to offer any new learning and development needed | * All councillors are offered PDPs and more than half of councillors take them up * Council has a process for individual councillor reviews to reflect on strengths and support progression * Council has a process of annual review to assess the take up and suitability of internal development offers | * Councillor role descriptions * Training needs analysis * Personal development plans * Use of the [LGA Local Leadership Framework](https://www.local.gov.uk/publications/local-leadership-framework-councillors) (building on Political Skills Framework and The 21st Century Councillor) |  |  |  |

Element 2.3 The various councillor roles are clearly defined and outline how they contribute to the achievement of community, political and council objectives

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| Requirements for Charter | Requirements for Charter Plus | Examples of evidence | Your evidence | Action | By when and by whom |
| * Councillors demonstrate an understanding of the skills and knowledge required in their ward and council wide roles * Councillor role descriptions exist and are maintained for all key roles including the ward councillor, cabinet member and others * Councillors are clear about what the council is trying to achieve and the key role they play in this as councillors | * Role descriptions are used for the recruitment and selection of candidates and to identify and prioritise development needs * Role descriptions are used to support succession planning * Evidence that councillors are clear about:   + the role of partner bodies   + the role of other stakeholders   + their own role on partner bodies   + their own role in relation to other stakeholder bodies * Councillors in strategic roles, such as Leader, Cabinet, Opposition Leaders, Scrutiny, Audit etc are supported to access specific training on their role type and policy areas * Council has an internal mentoring arrangements for councillors taking up new roles or portfolios for the first time | * Systems are in place to identify individual development and support needs for specific roles * Learning styles and training needs analysis * Personal Development Plans link to role and corporate objectives * Councillors are able to describe how learning and development activities have helped them to carry out their role and contribute to the achievement of the council’s objectives * Analysis of training and development for councillors in strategic/ executive roles * Role descriptions are in place for key roles, for example, Leaders, Cabinet Members, Chair of Scrutiny and Audit Committee, * Internal mentoring arrangements, either councillor to councillor, or officer to councillor where the councillor is taking up a new portfolio for the first time |  |  |  |

Element 2.4 The council has a structured process for assessing current and future leadership and executive team development needs

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| Requirements for Charter | Requirements for Charter Plus | Examples of evidence | Your evidence | Action | By when and by whom |
| * Structured process to assess current and future leadership development needs * This takes into account corporate risk management planning for any challenging times or disruption to business as usual * A development plan is in place that supports the top political and management teams in learning about each other and working effectively together * Leadership development is used to support future succession planning | * Leaders, cabinet members and chairs have identified and undertaken development appropriate to their responsible area * A programme to develop the next generation of leaders is in place as part of the council’s approach to succession planning | * Process in place to identify leadership requirements * Leadership Development Plans * 360 Degree Leadership Audits * Political leadership development programmes e.g. LGA Leadership Academy and Leadership Essentials Programmes * Events that support councillor / officer team building * Joint events with executive and senior management * Succession planning strategies * Community leadership development programmes * The political leadership can describe actions taken to develop political leadership capacity * The political and managerial leadership can give examples of how they work together as a team |  |  |  |

Element 2.5 There is a corporate councillor learning and development plan in place

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| Requirements for Charter | Requirements for Charter Plus | Examples of evidence | Your evidence | Action | By when and by whom |
| * The plan links to council’s corporate objectives and the development of councillors * The plan includes individuals, committees and political leadership needs | * The plan clearly prioritises learning and development that supports the corporate objectives | * Corporate councillor learning and development plan * The cross-party councillor development task group are able to explain how learning and development activities are prioritised |  |  |  |

Criterion 3. Learning and development is effective in building skills and knowledge

Element 3.1 Investment in learning and development is regularly evaluated and improvements implemented

| Requirements for Charter | Requirements for Charter Plus | Examples of evidence | Your evidence | Action | By when and by whom |
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| * Evaluation strategy is in place to analyse the cost and benefits of councillor development * Evaluation and improvement processes take into account corporate risk management and reviews taken during/after any times of in challenging times or disruption to business as usual * Political and managerial leadership display a good understanding of both the costs and benefits of development activities * Councillors can describe why they did certain activities, what they learnt and what difference it has made to them carrying out their various roles * Continuous improvement in the approach to developing councillors is identified and implemented | * Evaluation strategy is in place to analyse the impact of councillor development activities * Some form of impact assessment at the corporate and community level exists and is used to evaluate the impact of development (e.g. feedback from partners is actively sought) * Case studies of how learning and development has impacted on individual and corporate performance * There are links to an evaluation strategy * Evaluation outcomes from internal development sessions inform change and drive continuous improvement * A quality assurance process is in place | * Evaluation strategy is in place and is effective * Analysis of costs and benefits to the council from councillor learning and development * Case studies of how learning and development has impacted on individual and corporate performance * Notes of meetings, focus groups, questionnaires or interviews involving councillors evaluating the impact of their development on overall performance * Political and managerial leadership display a good understanding of both the costs and benefits of development activities * Political and managerial leadership can provide examples and evidence of the impact and benefits of councillor development * Written reviews of learning and development activities with recommendations for change * Notes of meetings, reports, personal statements providing examples of improvements to learning activities * Changes to development programmes and a rationale for the changes made * Councillors can describe what has been done to improve the development activities * Quality assurance process is in place and is effective |  |  |  |

Element 3.2 Learning is shared with other councillors and, where appropriate, with officers and stakeholders to encourage capacity building and a culture of learning across the council and externally

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| Requirements for Charter | Requirements for Charter Plus | Examples of evidence | Your evidence | Action | By when and by whom |
| * Knowledge and learning are shared with councillors’ peers, officers and others as with other councils and organisations and particularly in challenging times or disruption to business as usual | * There is an effective process in place for disseminating, sharing and exchanging knowledge and learning within and outside of the organisation. | * Examples of reports, briefing sessions, and information exchange systems used to capture and disseminate learning programmes of joint learning exchanges * Councillor formal / informal mentoring arrangements * Hosting case study visits * Developing councillor champions for topic areas * Councillors can give examples of how they have supported and learned from the development of others |  |  |  |