

**REPORT OF ADMINISTRATION & DEMOCRATIC SERVICES MANAGER
AND DEPUTY MONITORING OFFICER**

SUBJECT: PERSONAL DEVELOPMENT REVIEWS

Purpose of report

To seek Members' approval of a Personal Development Review framework for Members.

Background

Being a Member of an Authority is a multifaceted role and, while they bring a whole range of expertise and experiences to the position, there are high expectations on them to undertake a diversity of responsibilities to ensure that the Authority performs to the best of its ability and is seen to be fit for purpose.

To this end, the Authority has endeavoured to support Members by providing opportunities for them to refresh and/or develop their skills and knowledge base. A range of mechanisms have been tried over the years in an effort to increase Member participation and the current process includes a self-assessment form whereby Members identify for themselves what support (if any) they need.

Local Government (Wales) Measure 2011

Section 7 of the Local Government (Wales) Measure 2011 (The Measure) places a **requirement** on local authorities to provide all Members with an opportunity to have a personal development review to assess their development needs:

"7 Training and development of Members of a local authority

- (1) A local authority must secure the provision of reasonable training and development opportunities for its Members.*
- (2) A local authority must make available to each Member of the authority an annual review of the Member's training and development needs.*
- (3) The review must include an opportunity for an interview 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) In exercising its functions under this section a local authority must have regard to guidance given by the Welsh Ministers.*

- (5) *In the case of an authority which operates a leader and cabinet executive (Wales), a reference in this section to a Member of a local authority does not include the executive leader.”*

In addition, the Welsh Local Government Association’s Charter for Member Support and Development requires all Members in receipt of a Senior Salary to undertake a Personal Development Review.

Personal Development Reviews

The recently reviewed Member Development Strategy set out a Personal Development Review (PDR) process and this was adopted at a meeting of the Authority on 25 July 2019. PDRs are an opportunity for Members to discuss any development/support requirements they would like to receive in order to help them in their role as Member of the Authority. The PDR is set within the context of that role, the Member’s aspirations for what s/he hopes to achieve during his/her term of office and the purpose and aspirations of the Authority. It also enables Members to build confidence, develop skills and knowledge and improve their own performance and contribution to the Authority and the community at large.

The guidance, which is attached at Appendix A, was agreed by the Member Support and Development Committee on the 6th November 2019, subject to minor amendments that have now been incorporated.

The process

Paragraph 7(3) of The Measure (above), requires a “suitably qualified” person to undertake the Reviews and an officer from the Welsh Local Government Association recently provided training to a number of Members, as both facilitators and Members who will be receiving Reviews, in how to get the most out of the process.

Risk considerations

The Local Government (Wales) Measure 2011 places increased requirements on all local authorities in Wales in relation to corporate governance and Member support and development. By putting in place processes to ensure that the Authority can attain – and retain – Charter status, we ensure that the Authority continues to have informed Members who can make decisions based on understanding, skills and experience.

Compliance

The Authority has developed a strong ethos of Member development, which has been endorsed by the award of the Charter Level in 2010 and again in 2014. A submission for the Advanced Charter will build on the good work carried out to date and re-emphasise the fact that the Authority works to a high standard of governance.

RECOMMENDATION:

That Members adopt the Personal Development Review guidance document.

Background papers:

The Wales Charter for Member Support and Development: the new criteria and assessment process 2012 – National Park Authorities
Guidance for Authorities planning to implement Personal Development Reviews for Members – September 2012
Report to the Member Support and Development Committee: 06 November 2019

(For further information, please contact Janet Evans, Administration & Democratic Services Manager and Deputy Monitoring Officer, on extension 4834, or by emailing janete@pembrokeshirecoast.org.uk)

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APPENDIX A

PEMBROKESHIRE COAST NATIONAL PARK AUTHORITY



PERSONAL DEVELOPMENT REVIEWS: GUIDANCE DOCUMENT

February 2020

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Introduction

Personal Development Reviews (PDRs) are an integral part of supporting you, as a Member, during your period of office with the Authority. You already bring a range of expertise and experiences to your role, which you will need to apply in order to carry it out effectively. However, in the current political climate you will, no doubt, face many challenges along the way and the Authority will do its utmost to ensure that you have all the necessary tools at your disposal to enable you to undertake your role.

What is the purpose of a Personal Development Review?

A Personal Development Review is a way for you and the Authority to mutually assess your personal development needs. It will be set within the context of your role as a Member, your aspirations for what you hope to achieve, the purpose and aspirations of the Authority and the needs of the community at large.

A PDR **IS NOT** a performance review or an assessment of how well or badly you have conducted your duties; it is a framework to help you refresh and/or develop your skills, knowledge and experience and build confidence in your contribution to the work of the Authority.

Your Review will enable you to:

- understand the expectations and accountabilities placed upon you;
- reflect on whether the Authority's induction and continuing development framework is effective in helping you carry out your role;
- identify what skills/knowledge areas you need to strengthen/develop in order to fully equip you for the future, and
- prepare for new roles (succession planning).

It will also enable the Authority to:

- identify priorities for future development, and
- review the induction and development programme carried out to date and set the programme for the ensuing year.

How does it work?

A PDR should be a free flowing, constructive conversation in which a range of views are exchanged which are treated sensitively and in confidence. It must be appropriate and constructive, but also challenging if you are to make the most of the process. The outcome will be used as a basis for making development and improvement plans and reaching agreement about what should be done in the future, for you personally and, possibly, for the membership as a whole.

To support you in this, you will be asked to complete a pro-forma (see Appendix 1) prior to your Review, which will help you reflect on your role/responsibilities with the Authority and to examine your strengths, what skills you have and what support you might need to support you in the future. The role descriptions previously adopted by the Authority will help you reflect on this. If you so wish, your completed pro-forma can be sent to your facilitator in advance of your Review to give them time to prepare for the session.

Please note that the pro-forma will not be shared with anyone other than the facilitator of your Review, unless you determine otherwise.

At the end of the Review you will have identified any knowledge or skills gaps that you have, and agreed and recorded in your Personal Support Plan (at the back of your pro-forma) any activities/events to help you develop this knowledge/skill.

The information contained in the Personal Support Plans should be returned to the Administration and Democratic Services Manager who will treat it in confidence and use it to prepare an overall Member development programme for the following and future years.

Who will facilitate my Review?

| Member being reviewed | Facilitator |
|------------------------------|--|
| Chair of the Authority | Either: Chair of one of the other two Welsh National Park Authorities, or Deputy Chair of the Authority plus the Chair of |

| | |
|---|---|
| | one of the following: Development Management Committee, Audit & Corporate Services Review Committee, Operational Review Committee or the Member Support & Development Committee, or Deputy Director of the Welsh Government's relevant Sponsoring Department |
| Deputy Chair of the Authority | Chair of the Authority |
| Chair of the Development Management Committee | Chair or Deputy Chair of the Authority |
| Remaining Members | Either: Chair of the Authority, or Deputy Chair of the Authority, or the Chair of one of the following: Development Management Committee, Audit & Corporate Services Review Committee, Operational Review Committee or the Member Support & Development Committee |

The table above is indicative only and a Member may choose to ask some other person to facilitate, whether another Member or the Human Resources Manager. Support will also be provided by the Administration and Democratic Services Manager if required.

Guidance for Members conducting Reviews (Facilitators)

Before conducting your Review(s) you may find it useful to consider the following guidance:

Purpose of the Review

The purpose of your meeting will be to provide your interviewee with an opportunity to review their role generally, identify any specific tasks for the year ahead, consider the areas where they feel confident and identify areas where they will be more challenged and may need support and development. Their learning and development needs, together with the usefulness or otherwise of previous development opportunities, will then be fed back to the Administration and Democratic Services Manager to create development programmes.

Preparation

You may want to familiarise yourself with the role description of the Member whose Review you are conducting and consider some of the questions that you will ask to help the interviewee explore their role and needs. Although the Democratic Services team will provide full information to all Members, you may wish to re-familiarise yourself with the training, development and support that might be available to Members in the Authority. Your interviewee will contact you to plan a time and place convenient to you both where you can have a confidential undisturbed conversation.

Undertaking the Review

Please remember that the conversation you have with your interviewee needs to be kept confidential to yourselves.

Your role is to help the interviewee consider his/her role and contribution, strengths and/or weaknesses and training needs. You should act as an objective sounding board in this exploration.

Your role is not to give your own feedback on the performance of your colleague.

Use the pro-forma (see Appendix 1) as a basis for your discussions.

It is the responsibility of the interviewee to undertake any actions resulting from the Review. Keep any documentation and discuss any emerging development needs with the Administration and Democratic Services Manager.

Any additional support required from the Authority may also be identified and fed into the organisation as appropriate.

Guidance for Members being interviewed

Before undertaking your Review, you may find it useful to consider the following guidance:

Purpose of the Review

The purpose of your meeting will be to provide you with an opportunity to review your role generally, consider any specific tasks for the year ahead, consider the areas where you feel confident and identify areas that you might find challenging and may need support and development. You will have an opportunity to identify learning and development needs which you will then be able to feed back to the Administration and Democratic Services Manager to organise development programmes. You can also review the usefulness of training that you have already received.

Preparation

Before your meeting you will need to complete the pro-forma (see Appendix 1). This will help you to think about your role, specific tasks for the coming year and any support that you might need. You'll also find it useful to review your role description, person specification and the Member Development Strategy.

Make contact with your facilitator and plan a time and place convenient to you both where you can have a confidential undisturbed conversation.

Undertaking the Review

Please remember that the conversation you have with your facilitator needs to be kept confidential to yourselves.

Use the pro-forma as a basis for your discussions.

Your facilitator will help you consider your role and contribution, strengths and/or weaknesses and training needs. They will act as an objective sounding board in this conversation.

Their role is not to give their own feedback on your performance.

Please note that it is your responsibility to undertake any actions resulting from the Review.

Any additional support required from the Authority may also be identified by the facilitator and fed into the organisation as appropriate.

APPENDIX 1



Pembrokeshire Coast National Park Authority

Personal Development Pro-forma

Please complete this pro-forma and bring it to your review meeting. The document is confidential to you and the person conducting your review.

However, please note that the Personal Support Plan at the back of this form will be used in confidence by the Democratic Services team to inform future development plans and training programmes.

Name: _____

| | |
|-----------|---|
| 1. | What are my current role(s) and responsibilities? <i>(e.g. Member of the Authority, Chair/Deputy Chair of the Authority, Chair/Deputy Chair of a Committee)</i> |
| 2. | What do I need to know about and/or be able to do to undertake my role(s)? <i>(Refer to relevant role description and person specification. The current Member Development Strategy Framework may also help you here)</i> |

| | |
|----|---|
| 3. | What aspect(s) of my role(s) am I confident in? |
| 4. | Where am I less confident? |
| 5. | Is there anything preventing me from undertaking my role effectively? <i>(consider any personal or organisational issues which might be a barrier to success)</i> |
| 6. | What learning and development have I undertaken this year? |
| 7. | What have I learned and been able to achieve as a result of this learning and development? |

| | | |
|----|--|---|
| 8. | What additional learning and development would be useful? <i>(use the table below)</i> | |
| | Area(s) of development | Preferred method of delivery |
| | Skills <i>(e.g. decision-making, meeting management, questioning techniques, etc.)</i> | <i>(e.g. workshop, study tour, peer networking, e-learning, etc.)</i> |
| | Knowledge <i>(e.g. Code of Conduct, planning process, budget process, equalities, local policy, etc.)</i> | |



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Personal Development Support Plan

Name: _____

Review date: _____

Facilitator: _____

My learning and development needs for this year (please note that this information will be used in confidence by the Democratic Services team to inform future development plans and training programmes). (Please delete the examples provided in the form below.)

| Area for development | How | Priority |
|--|--|-----------------|
| <i>Example: How to Chair meetings effectively</i> | <i>Example: I'd like to observe meetings in other authorities A workshop on chairing skills I'd like some written guidance</i> | |
| <i>Example: How do I contribute to the budget setting process?</i> | <i>Example: I'd like a meeting with the Finance Manager A workshop on budget setting</i> | |
| <i>Example: Learning more about what we do in the community</i> | <i>Example: A presentation from the Community Archaeologist I'd like to shadow a Ranger for the day</i> | |

My evaluation of the training I have already received:

| Training undertaken | What difference has this made to the way I work as a Member? |
|--|--|
| <i>Example: Authority induction programme on the work of the Authority and who's who</i> | <i>Example: It has given me a good insight into how the Authority operates and to know who the appropriate officers are to speak to. It has also highlighted areas where I need further training</i> |
| <i>Example: Chairing skills workshop</i> | <i>Example: It has helped me better understand the Authority's Standing Orders and enabled me to manage meetings more effectively</i> |
| <i>Example: Planning training</i> | <i>Example: I have gained a better understanding of how the planning system works and how officers reach their decisions. It has also enlightened me on a Member's role in the process</i> |