

# Aberffraw Community Council

## TRAINING PLAN

Date approved by Council 19<sup>th</sup> April 2023

Date of First Planned Review – 18<sup>th</sup> October 2023 (no changes made)

Date update approved by Council : 22 May 2024 Date of Second Planned Review – 22<sup>nd</sup> May 2024 at AGM

Date of Third Planned Review = October 2024

*This training plan has been prepared in accordance with Section 67 of the 2021 Local Government and Elections (Wales) Act*

This training plan has been prepared based on the guidance issued by One Voice Wales and the Society of Local Councils. Councillor roles and employee roles have been assessed by reference to a set of core competencies for each role. This assessment has enabled the Council to prioritise its resources to enable all roles within the council to be supported by a well thought approach to its training and development needs. The commitment contained in this training plan will assist the council to enhance its approach to the delivery of high-quality services to its community. The plan will be reviewed at least on an annual basis to ensure that it remains fit for purpose and accounts for the changing needs of councillors and employees as well as any turnover of councillors or employees.

Role	Training to be arranged in 2023/24	Training to be arranged in 2024/25	Training to be arranged in 2025/26	Training to be arranged in 2026/27	Training to be arranged in 2027/28
Chair		Chairing Skills	The Council as an employer		
Vice Chair			Effective Staff Management		
Clerk		Information Management	Finance and Man - advanced		
New Councillors	Code of Conduct	Code of Conduct x 2	Code of Conduct	Code of Conduct	Code of Conduct
Councillors		The Council as an employer	Understanding the law		New Councillor induction

Councillors		Health & Safety			
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Include below any specific comments about how the training will be arranged or how other development needs will be addressed through other methods e.g., attendance at conferences of events

**ESTIMATED COSTS OF THE TRAINING IN EACH COUNCIL YEAR** (To be included in the annual budget for each of the next five years):

(This table to include the amount in the current 2023/24 budget)

<b>Financial Year</b>	<b>Amount to be included in the budget at 2023 Prices (£)</b>	<b>Comments</b>
2023/24	£ 324.00	4 New councillors and 1 newer councillor to be trained – DF/GS/ES/BO/?
2024/25	£190.00	5 modules est plus 1 free module
2025/26	£228.00	6 modules est
2026/27	£234.00	6 Modules est
2027/28	£240.00	6 Modules est

## LEARNING AND DEVELOPMENT PLAN TEMPLATE (Councillor)

Name of Councillor – Chris Topps (Chair)

<b>Core competency</b>	<b>Assessed Competency Level (1-4)</b>	<b>Brief Description of Training Required (By reference to core competences) – Appendix 1</b>	<b>Priority (Put in Year)</b>	<b>Courses to Attend</b>	<b>Date Course Attended</b>
<b>Role of Councillor</b>					
<b>Legal Basis for Delivery of Services</b>					
<b>Understanding the planning system</b>					
<b>Conduct</b>					
<b>Equality and Diversity</b>					
<b>Financial Governance and Accountability</b>					
<b>Attendance/Preparation for Meetings and Events</b>					
<b>Information Management</b>					
<b>Using ICT and social media</b>					
<b>Working with Clerk/Other Employees</b>					

<b>Health and Safety</b>					
<b>Continuing professional and personal development</b>					
<b>Financial Capability</b>					
<b>Sustainable Development</b>					
<b>Local Leadership</b>					
<b>Chairing Skills</b>			<b>2024</b>	<b>Module 10 - Chairing Skills</b>	
<b>Civic Leadership</b>					

**An assessment should be made for each councillor to identify their current competency level using a scale of 1-4 where 4 is fully proficient. Priority should be given to competency levels assessed as 1 or 2**

## LEARNING AND DEVELOPMENT PLAN TEMPLATE (Councillor)

Name of Councillor – Bryan Owen (Vice Chair)

<b>Core competency</b>	<b>Assessed Competency Level (1-4)</b>	<b>Brief Description of Training Required (By reference to core competences) – Appendix 1</b>	<b>Priority (Put in Year)</b>	<b>Courses to Attend</b>	<b>Date Course Attended</b>
<b>Role of Councillor</b>					
<b>Legal Basis for Delivery of Services</b>					
<b>Understanding the planning system</b>					
<b>Conduct</b>				<b>Module 9: Code of Conduct</b>	
<b>Equality and Diversity</b>					
<b>Financial Governance and Accountability</b>					
<b>Attendance/Preparation for Meetings and Events</b>					
<b>Information Management</b>					
<b>Using ICT and social media</b>					
<b>Working with Clerk/Other Employees</b>					

<b>Health and Safety</b>					
<b>Continuing professional and personal development</b>					
<b>Financial Capability</b>					
<b>Sustainable Development</b>					
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<b>Chairing Skills</b>					
<b>Civic Leadership</b>					

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## LEARNING AND DEVELOPMENT PLAN TEMPLATE (Councillor)

Name of Councillor – Mrs E Smith

<b>Core competency</b>	<b>Assessed Competency Level (1-4)</b>	<b>Brief Description of Training Required (By reference to core competences) – Appendix 1</b>	<b>Priority (Put in Year)</b>	<b>Courses to Attend</b>	<b>Date Course Attended</b>
<b>Role of Councillor</b>					
<b>Legal Basis for Delivery of Services</b>					
<b>Understanding the planning system</b>					
<b>Conduct</b>				<b>Code of Conduct undertaken</b>	<b>29/6/23</b>
<b>Equality and Diversity</b>					
<b>Financial Governance and Accountability</b>					
<b>Attendance/Preparation for Meetings and Events</b>					
<b>Information Management</b>					
<b>Using ICT and social media</b>					
<b>Working with Clerk/Other Employees</b>					

<b>Health and Safety</b>					
<b>Continuing professional and personal development</b>					
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## LEARNING AND DEVELOPMENT PLAN TEMPLATE (Councillor)

Name of Councillor – Mr Elwyn Evans

<b>Core competency</b>	<b>Assessed Competency Level (1-4)</b>	<b>Brief Description of Training Required (By reference to core competences) – Appendix 1</b>	<b>Priority (Put in Year)</b>	<b>Courses to Attend</b>	<b>Date Course Attended</b>
<b>Role of Councillor</b>					
<b>Legal Basis for Delivery of Services</b>					
<b>Understanding the planning system</b>					
<b>Conduct</b>					
<b>Equality and Diversity</b>					
<b>Financial Governance and Accountability</b>					
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## LEARNING AND DEVELOPMENT PLAN TEMPLATE (Councillor)

Name of Councillor – Mr E R Roberts

<b>Core competency</b>	<b>Assessed Competency Level (1-4)</b>	<b>Brief Description of Training Required (By reference to core competences) – Appendix 1</b>	<b>Priority (Put in Year)</b>	<b>Courses to Attend</b>	<b>Date Course Attended</b>
<b>Role of Councillor</b>					
<b>Legal Basis for Delivery of Services</b>					
<b>Understanding the planning system</b>					
<b>Conduct</b>					
<b>Equality and Diversity</b>					
<b>Financial Governance and Accountability</b>					
<b>Attendance/Preparation for Meetings and Events</b>					
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<b>Using ICT and social media</b>					

<b>Working with Clerk/Other Employees</b>					
<b>Health and Safety</b>					
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## LEARNING AND DEVELOPMENT PLAN TEMPLATE (Councillor)

Name of Councillor – Mr Alan Rees

<b>Core competency</b>	<b>Assessed Competency Level (1-4)</b>	<b>Brief Description of Training Required (By reference to core competences) – Appendix 1</b>	<b>Priority (Put in Year)</b>	<b>Courses to Attend</b>	<b>Date Course Attended</b>
<b>Role of Councillor</b>					
<b>Legal Basis for Delivery of Services</b>					
<b>Understanding the planning system</b>					
<b>Conduct</b>					
<b>Equality and Diversity</b>					
<b>Financial Governance and Accountability</b>					
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## LEARNING AND DEVELOPMENT PLAN TEMPLATE (Councillor)

Name of Councillor – MrS G Stallwood

<b>Core competency</b>	<b>Assessed Competency Level (1-4)</b>	<b>Brief Description of Training Required (By reference to core competences) – Appendix 1</b>	<b>Priority (Put in Year)</b>	<b>Courses to Attend</b>	<b>Date Course Attended</b>
<b>Role of Councillor</b>					
<b>Legal Basis for Delivery of Services</b>					
<b>Understanding the planning system</b>					
<b>Conduct</b>					
<b>Equality and Diversity</b>					
<b>Financial Governance and Accountability</b>					
<b>Attendance/Preparation for Meetings and Events</b>					
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## LEARNING AND DEVELOPMENT PLAN TEMPLATE (Councillor)

Name of Councillor – Mr D Fowlie

<b>Core competency</b>	<b>Assessed Competency Level (1-4)</b>	<b>Brief Description of Training Required (By reference to core competences) – Appendix 1</b>	<b>Priority (Put in Year)</b>	<b>Courses to Attend</b>	<b>Date Course Attended</b>
<b>Role of Councillor</b>					
<b>Legal Basis for Delivery of Services</b>					
<b>Understanding the planning system</b>					
<b>Conduct</b>					
<b>Equality and Diversity</b>					
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## LEARNING AND DEVELOPMENT PLAN TEMPLATE (Councillor)

Name of Councillor – Mr O Fowlie

<b>Core competency</b>	<b>Assessed Competency Level (1-4)</b>	<b>Brief Description of Training Required (By reference to core competences) – Appendix 1</b>	<b>Priority (Put in Year)</b>	<b>Courses to Attend</b>	<b>Date Course Attended</b>
<b>Role of Councillor</b>					
<b>Legal Basis for Delivery of Services</b>					
<b>Understanding the planning system</b>					
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<b>Equality and Diversity</b>					
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## LEARNING AND DEVELOPMENT PLAN TEMPLATE (Councillor)

Name of Councillor – Mr R F Owen

<b>Core competency</b>	<b>Assessed Competency Level (1-4)</b>	<b>Brief Description of Training Required (By reference to core competences) – Appendix 1</b>	<b>Priority (Put in Year)</b>	<b>Courses to Attend</b>	<b>Date Course Attended</b>
<b>Role of Councillor</b>					
<b>Legal Basis for Delivery of Services</b>					
<b>Understanding the planning system</b>					
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<b>Local Leadership</b>					
<b>Chairing Skills</b>					
<b>Civic Leadership</b>					

## LEARNING AND DEVELOPMENT PLAN TEMPLATE (Councillor)

Name of Councillor –

<b>Core competency</b>	<b>Assessed Competency Level (1-4)</b>	<b>Brief Description of Training Required (By reference to core competences) – Appendix 1</b>	<b>Priority (Put in Year)</b>	<b>Courses to Attend</b>	<b>Date Course Attended</b>
<b>Role of Councillor</b>					
<b>Legal Basis for Delivery of Services</b>					
<b>Understanding the planning system</b>					
<b>Conduct</b>					
<b>Equality and Diversity</b>					
<b>Financial Governance and Accountability</b>					
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<b>Health and Safety</b>					
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<b>Financial Capability</b>					
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<b>Chairing Skills</b>					
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## LEARNING AND DEVELOPMENT PLAN TEMPLATE (Councillor)

Name of Councillor – Rachel Jones

<b>Core competency</b>	<b>Assessed Competency Level (1-4)</b>	<b>Brief Description of Training Required (By reference to core competences) – Appendix 1</b>	<b>Priority (Put in Year)</b>	<b>Courses to Attend</b>	<b>Date Course Attended</b>
<b>Role of Councillor</b>					
<b>Legal Basis for Delivery of Services</b>					
<b>Understanding the planning system</b>					
<b>Conduct</b>					
<b>Equality and Diversity</b>					
<b>Financial Governance and Accountability</b>					
<b>Attendance/Preparation for Meetings and Events</b>					
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<b>Health and Safety</b>					
<b>Continuing professional and personal development</b>					
<b>Financial Capability</b>					
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<b>Local Leadership</b>					
<b>Chairing Skills</b>					
<b>Civic Leadership</b>					

**An assessment should be made for each councillor to identify their current competency level using a scale of 1-4 where 4 is fully proficient. Priority should be given to competency levels assessed as 1 or 2**

## LEARNING AND DEVELOPMENT PLAN TEMPLATE (Employee)

**Name of Employee – Jane Davies – Clerk/RFO**

Describe Relevant Competency	Assessed Competency Level (1-4)	Brief Description of Training Required (By reference to core competencies relevant to the role)	Priority (Put in Year)	Courses to attend	Date Course Attended
To ensure compliance with proper financial practices including accounts, financial regulations, audit processes, VAT and procurement	4	Statutory legislation for financial records and process. Basic Audit requirements.	2022	Module 6 - Local Government Finance	
Can advise the council on financial planning and reporting including the preparation and review of budgets, the management of risks to public money and funding applications	2	Budgets and Annual Reporting.	2022	Module 21 – Understanding Local Government Finance – Advanced	
Understands the roles, responsibilities, and duties of the council and of the individuals involved in the work of the council/ Establish appropriate and lawful procedures for managing the meetings of the council and its committees/ Can advise the council on its duties and powers	2	Minute requirements and process of meetings.	2024 2024	Module 5 - The Council Meeting Module 4 – Understanding the Law	

Organise and maintain effective administrative systems, processes, policies and records	3		2025	Module 15 - Information Management Module 12 – Creating a Community Plan	
Data Protection and Equality			2025	Module 7 - Health & Safety	

**An assessment should be made for each employee to identify their current competency level using a scale of 1-4 where 4 is fully proficient. Priority should be given to competency levels assessed as 1 or 2**

## APPENDIX ONE

### PROGRAMMING AND ESTIMATED COST OF TRAINING

Courses Identified as Needed (Title)	Role to which they relate	2023/24 Est Cost and No. of Courses	2024/25 Est Cost and No. of Courses	2025/26 Est Cost and No. of courses	2026/27 Est Cost and No. of courses	2027/28 Est Cost and No. of courses	Comments
Code of Conduct	All new Councillors	6 x £36.00	1 x £37.00				
Chairing Skills	Vice Chair	1 x £36.00	1 x £37.00				Possible free course each year
Information Management	Clerk	1 x £36.00					
The Council as an Employer	Councillor	1 x £36.00	1 x £37.00				
Finance & Management	Clerk/Counc illor		1 x £37.00				
Understanding the Law	Councillor		1 x £37.00				
Health & Safety	Councillor		1 x £37.00				
Courses tbc				6 x £38.00	6 x £39.00	6 x £40.00	
<b>Total agreed in budget</b>		<b>£324.00</b>	<b>£222.00</b>	<b>£228.00</b>	<b>£234.00</b>	<b>£240.00</b>	

## **Appendix TWO**

### **One Voice Wales Courses**

#### **National Training Programme for Community and Town Councils in Wales**

##### **Module 1 - The Council**

- The Council as a Corporate Body
- The “Team” of Members and Staff
- The Council’s Role
- Working with Unitary Authorities
- Building Partnership Working

During the presentation we will cover the council as a corporate body, the ‘team’ of members and staff, the council’s role, working with unitary authorities, and building partnership working with a wider group of organisations. By the end of this presentation, you should have a good understanding of the range of responsibilities of community and town councils as well as their changing role in serving local communities in Wales today.

##### **Module 2 - The Councillor**

- The Councillor and their Commitment
- Register of Interests
- Code of Conduct and Ethical Behaviour
- Monitoring Officers and Standards Committees
- Debating and Making Decisions
- Representing Your Electorate
- Building Bridges

During the presentation we will cover the Councillor and their commitment to the office of Councillor, the Register of Members Interests, the Code of Conduct and ethical behaviour expected of a Councillor, the role of the Monitoring Officer and the Standards Committee, the rules of debating and making decisions, how you represent on your electorate, and the need to “build bridges” between yourself, the council and other interested parties.

### **Module 3 - The Council as an Employer**

- Contracts of Employment
- Role and Person Specification
- Recruitment and Retention
- Discipline, Grievance and Appeals
- Health and Safety
- Training and Development
- Sources of Advice

During the presentation we will explore the role of the council as an employer. We will cover contracts of employment and how these define the employment relationship, the role and person specification, you may know the role specification as the 'job description', recruitment and retention, what you should do if things are going wrong, health and safety, and perhaps the most important of all getting the best out of everyone to help serve your local community, through training and development. Employment law and best practice is a complicated area, so lastly, we will finish by looking at some sources of advice.

### **Module 4 – Understanding the Law**

- Statutory duties and powers
- Ultra Vires
- The Powers of Delegation
- Welsh Language Act
- The duty to promote Equal Opportunities
- Data Protection and FOI Act
- Sources of advice

During the presentation we will cover a range of legislation and legal duties that affect community and town councils. We will cover statutory duties and powers, the principle of 'ultra vires', the powers of delegation, the Welsh Language Act, the duty to promote equal opportunities and the main statutes and regulations in this area data protection and Freedom of Information act and finally, sources of advice.

## **Module 5 - The Council Meeting**

- Calling meetings
- Types of meetings
- Standing Orders
- Agendas
- Conducting the meeting
- Passing resolutions
- Recording proceedings

During the presentation we will cover the different aspects of council meetings. We will talk about calling meetings, the different types of meetings including Annual Statutory Meetings, Extraordinary Meetings and Ordinary Meetings, the importance of Standing Orders setting and using agendas, conducting the meeting, passing resolutions, and recording proceedings.

## **Module 6 - Local Government Finance**

- The Role of the Responsible Finance Officer
- Accounting and Strategy Guidance
- Financial Regulations and Risk Assessment
- Budgets and Precepts
- Internal and External Audit
- Insurance
- Income and Expenditure Powers
- Other Sources of Income

During the presentation we will review all the important areas in overseeing local government finance. We will cover the role of the Responsible Finance Officer, some of the general principles of accounting, the main financial regulations and, most importantly how to assess the risks involved, setting budgets and precepts, putting robust internal and external audits in place, the insurance requirements of the Council, the income and expenditure powers of the Council, and finally other sources of income.

This is a large agenda, and financial management can sometimes appear daunting, but the aim of the session is to provide you with an understanding of the financial framework of the Council, the core information you need to know and the sources of more detailed information that you should refer to when you need to.



## **Module 7 - Health & Safety**

To explore the legal obligations of Councils and to highlight the processes and procedures that need to be in place to ensure compliance.

## **Module 8 - Introduction to Community Engagement**

The aim of this introductory module is to explore what is meant by the term 'community engagement' and how councils and Councillors can improve how they engage with the communities they serve. Using an interactive approach, the module explores why, how and where Councillors currently engage with their communities. The session includes a brief overview of key public policy in relation to community engagement and covers the key elements and terminology of community engagement. There is an opportunity for Councillors to share and learn from their personal experiences and the session ends with a community engagement planning exercise.

## **Module 9 - Code of Conduct**

A highly interactive and informative module that enables participants to understand the Nolan principles of public life and develop a more in-depth knowledge of the Code of Conduct and how it applies to local Councillors.

The module specifically covers the following:

- The Nolan Principles
- What Councillors must do and must not do
- Personal/Prejudicial interests
- Predetermination & Predisposition
- How the Code is Policed

The learning will be reinforced through practical exercises and a DVD of the Ombudsman explaining his role will be featured.

## **Module 10 - Chairing Skills**

To explore the role of the Chair and to consider the associated issues and highlight effective approaches to effective chairing of meetings.

## **Module 11 - Community Emergency Planning**

What does emergency planning mean to you?

This course will give an overview of emergency planning and how it relates to communities.

It will inform on the role of the main responding agencies and give an insight into what a community can do before, during and after an incident.

It will give you the opportunity to deal with a scenario real councils could face.

So...

- What is a resilient community?
- What should a community emergency plan look like?
- How would you interact with the responding agencies?
- This course will give the who, why, what and when of emergency planning!

### **Module 12 – Creating a Community Plan**

To provide Councils with the knowledge and skills to create community plans and better understand strategy and forward budgeting.

### **Module 13 - Community Engagement Part II (Tools & Techniques)**

To provide an insight into the way in which Councils can build on community engagement approaches and provide real leadership to help their communities and towns grow and thrive.

### **Module 14 - Equality & Diversity**

Providing Councils with a better understanding of equality law and the Welsh Language Act and assisting Councils to promote equality and avoid unfair discrimination.

### **Module 15 - Information Management**

To provide Councils with a better understanding of the legislation relating to Data Protection and Freedom of Information.

### **Module 16 - Use of IT, Websites & social media**

To provide Councils with a greater knowledge of the benefits of reaching out to their communities through electronic communication.

### **Module 17 - Making Effective Grant Applications**

To enable Councils to better understand the type of grant schemes available and to put together effective applications to support capital projects.

### **Module 18 – Managing Your Staff**

To provide an insight into the ways in which Councils can arrange for the effective management of their staff.

### **Module 19 – Devolution of Services / Community Asset Transfer**

Devolution of services is currently an important topic in Wales and the challenges and opportunities it presents are / or will be of concern to most Community and Town Councils.

The training module provides a highly interactive experience for Councillors and Clerks and covers the following key areas:

- Models for asset transfers
- Understanding lease issues and freehold transfers
- Models for and approaches to Service Devolution
- Policy Drivers
- Opportunities, Pitfalls and Planned outcomes
- Due Diligence Arrangements
- Asset Management Responsibilities
- Important role of Councillors
- Community Engagement approaches

### **Module 20 – Wellbeing of Future Generations Act 2015 / Sustainability**

This course will explain the principles of Sustainable development and relate these principles to the needs and aspirations of the communities you serve, identify relevant policies (e.g., Well Being of Future Generations Act 2015) and relate them to the powers and duties of local councils ensuring readiness to lead a process of Sustainable development planning and reporting.

### **Module 21 – Understanding Local Government Finance – Advanced**

This course is aimed at building on the knowledge gained from attendance at Module 6 – Local Government Finance. It will appeal especially to Chairs, those serving on Finance Committees and to any Councillor who wishes to learn more about the governance and accountability framework in which councils are required to operate.

This Module covers the following areas:

- Governance and Accountability
- Roles and Responsibilities
- The Annual Governance Statement
- The Statement of Accounts
- Internal Controls and their Review
- Compliance with the Law
- The Rights of Electors

- Risk Assessment
- Internal Audit
- Liabilities and Commitments
- Trust Funds
- Reserves and Provisions
- Investments

### **Module 22 - Understanding Mediation**

To provide an understanding of the relevance and effectiveness of mediation and conciliation approaches in the handling of low-level Code of Conduct complaints and in relation to employment matters.

### **Module 23 Successfully taking on a Community Asset Transfer**

To provide an understanding of the most effective ways of ensuring a successful community asset transfer.

## APPENDIX THREE

### TOPIC COURSES AVAILABLE FROM THE SOCIETY OF LOCAL COUNCIL CLERKS AS WELL AS QUALIFICATIONS

#### Webinars

The SLCC offer over 100 sector specific webinars for your officers to attend from VAT to Health & Safety, Planning to Carbon Literacy

<https://www.slcc.co.uk/events/webinar/>

#### Themed Summits

A one day dedicated event on topical matters

<https://www.slcc.co.uk/events/themed-summits/>

#### Practitioners' Conference

A two day in person event covering a variety of workshop topics for small / medium sized councils. A chance to network with likeminded clerks and share similar experiences

<https://www.slcc.co.uk/event/practitioners-conference-2023/>

#### Joint SLCC & OVW Conference

An annual event currently delivered virtually offering training and guidance on a variety of topics <https://www.slcc.co.uk/event/ovw/>

#### Management in Action

An interactive event featuring sessions around connecting people, developing strategy and preparing the sector for the future

<https://www.slcc.co.uk/event/mia>

#### National Conference

Hear from a range of distinguished sector speakers providing training focused on the conference theme (changes annually)

<https://www.slcc.co.uk/event/national/>

## Qualifications

SLCC offer a range of qualifications tailored to meet the needs of local council officers and others working with local councils in England and Wales. Study for a qualification and expand your skill set, broaden your career opportunities & progression and feel empowered.

ILCA <https://www.slcc.co.uk/qualification/ilca/>

FiLCA <https://www.slcc.co.uk/qualification/filca/>

ILCA to CiLCA <https://www.slcc.co.uk/qualification/ilca-to-cilca/>

CiLCA <https://www.slcc.co.uk/qualification/cilca/>

ILM (L5) Diploma in Leadership & Management

<https://www.slcc.co.uk/qualification/ilm-level-5-diploma-in-leadership-management/>

ILM (L5) Certificate in Coaching & Mentoring

<https://www.slcc.co.uk/qualification/ilm-level-5-certificate-in-coaching-mentoring/>

ILM (L5) Diploma in Coaching & Mentoring

<https://www.slcc.co.uk/qualification/ilm-level-5-diploma-in-coaching-mentoring/>

Community Governance

<https://www.slcc.co.uk/qualification/community-governance/>

## APPENDIX FIVE

### SCHEDULE OF COMPETENCIES

### COUNCILLORS

<b>Requirement</b>	<b>Knowledge and Skills</b>	<b>Effective Behaviours</b>
<b>Understanding the Role of the Councillor</b>	The extent and limits of a councillor's individual responsibilities and the powers and responsibilities of the Council as a corporate body in law.	Undertakes the role effectively in the council, the community and with partners. Understands the difference between the role of an individual member and the Council as a whole and ensures that this understanding is reflected in their work.
<b>Understanding of the legal basis upon which the Council delivers services to the community</b>	Understanding of the services delivered and the associated governing law, policies, procedures, plans and strategies that are in place to guide the work of the Council.	Is able to describe the work of the Council to the public and contributes to the development of the Council's work.
<b>Understanding the planning system</b>	Understanding of planning law, the development control process and the importance of the local development plan. It would also be helpful for councillors to understand the importance of place or community plans in this context.	Is able to assess planning applications in relation to material considerations, the relevance of technical advisory notes, the link with the local development plan and have an understanding of Section 106 and community infrastructure levy contributions from developers.
<b>Conduct</b>	Understanding of the ethical framework governing the work of councillors, specifically the code of conduct. Appreciation of the importance of accountability, integrity and transparency and openness.	Abides by the code of conduct at all times, always declares interests when appropriate, seeks advice from the Proper Officer when needed, treats others with respect at all times, demonstrates integrity, values others and never bullies any other councillor

		or employee, listens and stays calm in difficult situations.
<b>Equality and Diversity</b>	Personal skills in demonstrating respect for others regardless of sex, race, religion, age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity or sexual orientation. Understanding Equalities and Diversity law relating to the work of the Council and the role of the Councillor. Understanding of the need for and what constitutes respectful behaviour towards others.	Demonstrates equalities values in personal behaviour and council decisions. Applies appropriate equalities legislation and demonstrates equalities values in personal behaviour and council decisions. Treats everyone with respect at all times when acting as a councillor whether in the Council, community or political group.
<b>Financial Governance and Accountability</b>	An understanding of the internal and external audit process.	Engages effectively with the audit, inspection and regulatory process within the council, using this information to constructively challenge and support the financial management of the council.
<b>Attendance at and preparation for meetings and other organised events</b>	Understanding of the importance of regular attendance and engagement and the need to prepare effectively for meetings.	Attends meetings and events on a regular basis and gives priority to such attendance. Ensures that all papers included with council agendas are read before the meeting.
<b>Information Management</b>	Understanding and interpreting information and data. Ability to handle data in the format provided by the council. Understanding of the definition of confidentiality and how to handle confidential information - Understanding of the legal requirements of Data Protection and Freedom of Information legislation.	Receives information and data from a variety of sources and is able to store, share and use it effectively and where possible electronically. Does not keep records about people without seeking their agreement. Responds promptly and appropriately to FOI requests. Does not distribute or share confidential or restricted information.
<b>Using ICT and social media</b>	Seeks to develop Skills in all 'Office' applications such as word processing, presentation and spreadsheets and conducts council business electronically. Understands the social media policy of the council.	Communicates with the Clerk and other members electronically and through social media where appropriate.



<b>Working with the Clerk and other employees</b>	Understanding the role of the Clerk and other employees generally and the 'rules' they need to abide by. Skills in acting as a corporate employer. Understanding of the appointments process and interviewing skills.	Maintains professional relationships with employees recognising appropriate boundaries and abiding by the Member Officer Protocol (if adopted). Acts as an effective member of an appointment panel, applying sound HR and equality and diversity principles to secure the best candidate.
<b>Health and Safety</b>	Understanding of Health and Safety legislation in the work of the Council. Understand how to assess risks and ensure personal safety and that of others.	Promotes and ensures the health and safety of everyone in the council. Ensures personal safety when working in the Council and when in groups or alone in the community.
<b>Continuing professional and personal development</b>	Ability to identify personal development needs and to participate in development activities.	Undertakes regular personal development reviews taking account of role descriptions and competency frameworks. Takes responsibility for developing personal skills and knowledge, attends learning and development activities seeking tangible outcomes.
<b>Financial Capability</b>	Understanding of the way councils and services are funded. Understanding and skills in budget setting. Personal financial capability.	Engages effectively in the budget setting process. Is prepared to take hard, evidence-based decisions. Demonstrates skills in numeracy when interpreting data and asking questions.
<b>Sustainable Development</b>	Understanding of issues that impact on future generations such as health and wellbeing, financial security and the environment.	Takes decisions based upon the needs of future generations as well as the current population.
<b>Local Leadership</b>	Knowledge of community groups and leaders. Understanding of community issues and concerns. Ability to seek the views of all relevant parties. Understands the role and functions of the principal council.	Understands the needs of the local community and secures action from the council on behalf of local people. Communicates with the community, individuals and the council to ensure engagement and understanding of all parties.
<b>Chairing</b>	Understanding of meeting protocols and the rules of debate. Ability to manage the agenda, contributions and time. Chairs clearly and authoritatively, enforcing the rules and	Ensures that the public feel welcome, understand the meeting purpose and how they can contribute. Commitment to enabling all committee members to develop skills and participate effectively in

	<p>encouraging fair participation. Manages the agenda by introducing items, summarising debate, focussing on outcomes and limiting contributions which do not contribute to the outcomes.</p>	<p>meetings. Builds relationships with the Clerk to ensure that the work of the council/committee is relevant, well informed and provides the outcomes needed. Work programme development and management Understanding of the subjects within the scope of a committee and how these interact with council policies generally and the roles of other committees. Ability to develop a balanced work programme for the committee and clear terms of reference and outcomes for any subgroups. Works with the Clerk and committee members to develop the work plan taking account of the work of other committees.</p> <p>Ensures that the work programme takes account of national, regional and local plans, policies and the expressed needs of the community for services. Makes sure that the committee also takes account of inspections or reports from audit, inspection and regulation bodies.</p>
<p><b>Civic Leadership</b></p>	<p>In depth understanding of standing orders and rules of engagement. Effectively chairs meetings of the Full Council demonstrating meeting management and leadership skills. Representing the Council at civic functions Ability to manage the Council's reputation. Skills in public speaking. Skills in relationship management.</p>	<p>Demonstrates high level communication, interpersonal and social skills.</p>

## **APPENDIX SIX**

### **CLERKS (Deputies and Assistant Clerks)**

(These are taken from the CiICA portfolio guide)

Understands the roles, responsibilities and duties of the council and of the individuals involved in the work of the council

Is able to carry out research so that the council is well-informed for making decisions

Can manage the implementing of decisions for which the council is responsible

Can organise and maintain effective administrative systems, processes, policies and records

Can employ a variety of written and oral communication skills including the use of information and communications technology

Can advise the council on its duties and powers

Can ensure that all statutory requirements are observed including employment law, Health and Safety, Freedom of Information,

Data Protection and Equality

Is able to establish appropriate and lawful procedures for managing the meetings of the council and its committees

Can advise the council on statutory requirements and other procedures for maintaining public confidence in the council

Can advise the council on financial planning and reporting including the preparation and review of budgets, the management of risks to public money and funding applications

Is able to ensure compliance with proper financial practices including accounts, financial regulations, audit processes, VAT and procurement

Can support the council in the planning, management, funding and review of projects, services, assets and facilities

Can manage the employment, performance and development of council staff

Can manage effective relationships with contractors and service users

Can advise the council on its performance as a corporate body ensuring councillors have opportunities for training and development

Can advise and support the council as it identifies and implements plans for the future of the community it represents

Can manage and administer the council's participation in the planning system according to current planning law, policies and procedures

Can demonstrate an awareness of all aspects of the community served by the council, recognising and respecting different interests

and enabling cohesion

Can help provide all members of the community with opportunities for influencing decisions that affect their lives

Can facilitate the council's engagement with the community, managing public relations and ensuring that the council is transparent in

all its actions

Can manage effective partnership working

Can advise and support the council as it facilitates community activity

## APPENDIX SEVEN

### **Grounds Staff/Park Keepers/Cemetery Staff**

The core competencies for these roles can be accessed from the following web-link:

<https://qualifications.pearson.com/content/dam/pdf/NVQ-and-competence-based-qualifications/Work-based-Horticulture/2010/Specification/N029587-Edexcel-Level-2-Diploma-in-Work-based-Horticulture-QCF-221211.pdf>

In the case of cemetery staff, training is available from ICCM (<https://www.iccm-uk.com/iccm/training/>) and NAMM ([https://www.namm.org.uk/nammArticle.eb?id=76&ebd=0&ebp=10&ebz=3\\_1661350768001](https://www.namm.org.uk/nammArticle.eb?id=76&ebd=0&ebp=10&ebz=3_1661350768001))

### **Caretakers and Cleaners**

The core competencies for such roles can be found on the Ofqual website: <https://register.ofqual.gov.uk/>

You may also find that the Ofqual website will identify competencies linked to NVQ qualification for the wide range of other staff employed by community and town councils.