

MEMBERS' TRAINING AND DEVELOPMENT PANEL

**Venue: Town Hall, Moorgate
Street, Rotherham.**

Date: Thursday, 23 July 2009

Time: 2.30 p.m.

A G E N D A

1. Apologies
2. Minutes of the Previous Meeting held on 25th June, 2009 (herewith) (Pages 1 - 5)
3. Emergency Planning - Flu Pandemic (Presentation by Alan Matthews, Emergency and Safety Manager)
4. Alternative Technologies - Pow Wow Now and Meet Me.
5. CAA for Children's Services and Adult Learning - Workshops
6. Update on RIEP Bid (Cath Saltis, Head of Scrutiny and Member Support to report)
7. Local Government Finance Training (Officers to report)
8. E-Casework Update (report herewith) (Pages 6 - 11)
9. Date and Time of Next Meeting - Thursday, 24th September, 2009 at 2.30 p.m.

**MEMBERS' TRAINING AND DEVELOPMENT PANEL
THURSDAY, 25TH JUNE, 2009**

Present:- Councillor Sharman (in the Chair); Councillors G. A. Russell, Austen, Dodson, Gosling, Hughes, McNeely, Pickering, Whelbourn, Whysall and Wootton.

Apologies for Absence were received from Councillors Littleboy, Sangster, Smith, Turner and Carol Cockayne.

1. MINUTES OF THE PREVIOUS MEETING HELD ON 16TH APRIL, 2009

The minutes of the previous meeting held on 16th April, 2009 were agreed as a correct record.

With regards to Minute No. 43 (E-Casework) it was reported that an evaluation would be provided at the next meeting with a roll-out being planned for other Members. Councillor Dodson expressed an interest to be involved and was advised to contact Richard Copley, ICT Strategy and Client Co-ordinator.

Reference was also made to Minute 44 (Emergency Planning Training) and the general take-up by Members. It was suggested that future training be linked to the flu pandemic exercise.

Further to Minute No. 45 it was reported that several training sessions had been arranged on the constitution which covered various areas, including Community Call for Action and the conduct of Council meetings.

Councillor Austen also gave an update on her first year of the post graduate qualification and her experiences to date.

It was suggested that other Members be encouraged to take up some of the training packages currently on offer.

2. DEVELOPMENT PROGRAMME AND UPDATE

Cath Saltis, Head of Scrutiny and Member Services, gave an update on the Member Development Programme and the discussions that were taking place to progress some of this training forward.

Councillor Austen referred to an e-mail she had received from Government Office Yorkshire and the Humber referring to the benefits of neighbourhood training. As there was no knowledge of such training being made available it was suggested that the Head of Scrutiny and Member Services check this out.

Discussion also ensued on the benefits of seminars and the format these should take. It was suggested that likely alternatives be considered further with the Democratic Services Manager.

Reference was also made to the sessions of Local Government Finance training that had been arranged with colleagues in Finance for Elected Members.

Agreed:- That the Work Programme details and training on offer be noted.

3. UPDATE ON RIEP BID

Cath Saltis, Head of Scrutiny and Member Services, gave an update on the bid that had been submitted to lead on member development for South Yorkshire given the good experience Rotherham had had on a regional basis previously.

Information had now been received to indicate that Rotherham had been selected by Government Office Yorkshire and the Humber and discussions would now take place on how to progress this forward.

Agreed:- That feedback be provided in terms of the regional situation at the next meeting.

4. MEMBER CHAMPION TRAINING

Consideration was given to a report presented by the Head of Scrutiny and Member Services, which tried to clarify the current situation with regards to Member Champions in Rotherham, looked at good practice in other Authorities and attempted to provoke a discussion about whether it would be of benefit and interest to strengthen and promote the concept of Member Champions in Rotherham.

Discussion ensued on the value of Member Champions, their benefit and whether it should be the Cabinet Member that championed the cause.

Councillor McNeely pointed out that she had previously been the Better Regulation Champion in the past, but this position had since ceased.

It was also noted that Councillor S. Wright had designated seven Children's Locality Safeguarding Champions.

The Panel requested further information as to what time would need to be allocated to the Champion role, what feedback mechanisms were available and the selection process and stressed the importance of having specific terms of reference and role definitions. Whilst it was acknowledged that the safeguarding of children's welfare was paramount, there was little information available to indicate what the job role entailed or what was required.

Discussion ensued on the best way to take this forward and whether there was a need for Member Champions. It was, therefore, suggested that a

further report be submitted setting out clearly whether there was a need for Member Champions and if so a specific role definition be established.

Agreed:- (1) That a further report be submitted setting out in detail if there was a role for Member Champions.

(2) That should the need be demonstrated a specific role definition be established.

5. EQUALITIES TRAINING - PROPOSAL FROM INSTITUTE OF COMMUNITY COHESION (ICOCO)

Consideration was given to the proposal for a potential Member development programme covering the broad aspects of equalities and community cohesion presented by the Head of Scrutiny and Member Support.

This proposal was taken on the basis that Rotherham already had a well established Member development programme driven and supported by the Members' Training and Development Panel.

It was noted that Member development programmes were well attended in general with a very high percentage of Members having attended equalities and diversity training.

The Institute of Community Cohesion could, therefore, tailor the Member development programme within the local context of Rotherham with core elements of the programme being adapted and shared with other neighbouring authorities within the sub or even wider region.

The training would ensure that strengths were built upon and included and involved local input into delivery of the programme. The aim was also to encourage more robust evaluation of the programme than simple reference to participant satisfaction data.

Discussion ensued on the proposals and it was noted that Rotherham already had an established Equalities and Diversity Unit, which should be utilised in providing in house training for Members.

However, given the possibility of sharing the costs of this training package with other partners it was suggested that contact be made with neighbouring Local Authorities to establish any interest.

Agreed:- That expressions of interest be sought from partners and other Local Authorities with regards to the delivery of this community cohesion programme.

6. EQUALITIES AND COUNCILLORS WORKBOOK – LOCAL LEADERSHIP ACADEMY, IDEA

The Head of Scrutiny and Member Services made reference to the Member Workbook included as part of the agenda pack, which had been designed as a learning aid for Members.

It was suggested that this workbook be used when delivering training as it represented a good selection of good practices which were very useful.

Agreed:- That training sessions be arranged to utilise the workbook and relevant officers be invited to attend.

7. EMPLOYEE SUGGESTION SCHEME

Consideration was given to the Employee Suggestion Scheme request that an on-line Member chat room be established on a monthly basis which would enable groups such as the young, elderly or disabled to raise concerns and ask questions as a means to encouraging civil participation and assist the public in becoming more politically aware.

Discussion ensued on the feasibility of such a request and it was suggested that the views of the Cabinet be sought before any decision was made.

Agreed:- That the Cabinet consider the suggestion for the establishment of a Member on-line chat room.

8. REQUESTS FOR CONFERENCES

The Head of Scrutiny and Member Support reported on the current Member Development Budget, which had seen £10,000 so far this year having been spent.

Discussion ensued on the process of conference approval by the specific Directorates and the opportunities available by way of the Member Development Programme.

Every request for either a conference or training was seriously considered and all that could be accommodated within budget was approved.

Agreed:- That the information be noted and received.

9. EMERGENCY PLANNING

The Head of Scrutiny and Member Support reported on the attendance figures on the recently arranged Emergency Planning training and the proposals that were in hand for further training on a flu pandemic.

Discussions were taking place between relevant officers with a presentation being made to either the July or September meeting Members' Training and Development Panel.

Agreed:- That the information be noted and received.

10. DATE AND TIME OF NEXT MEETING

Agreed:- That the next meeting of the Panel take place on Thursday, 23rd July, 2009 at 2.30 p.m. at the Town Hall, Moorgate Street, Rotherham.

ROTHERHAM BOROUGH COUNCIL – REPORT TO MEMBERS
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1.	Meeting:-	Members' Training and Development Panel
2.	Date:-	23rd July, 2009
3.	Title:-	e-casework update
4.	Directorate:-	Financial Services/Chief Executive

5. Summary

e - Casework

For several years, RMBC has used Surgery Connect to manage the work flow involved in processing the casework generated by Member's when issues are brought to them by the Citizen.

More recently, Member's have expressed concern that the Surgery Connect system is difficult to use. At the Member Training Panel on September 25th a project was established to review the effectiveness of Surgery Connect and implement improvements or replace the system with something better suited to Member's casework needs. The project involved using alternative software to the Siebel Councillor Surgery reporting system as developed for Lambeth Council by ESD Toolkit. Around 15 Elected Members are currently using the system.

This paper updates Members on the progress of the project and sets out issues emerging from the work undertaken to date, in addition to reporting the benefits of adopting an electronic management system for councillor surgery casework.

6. Recommendations

(i) The Panel note the contents of this report;

(ii) The Panel refer this report to Cabinet so that formal approval can be given to the purchase of the e casework system;

(iii) The Panel support the development of a council wide policy framework that sets out the Councils approach to the management of Councillor Surgeries and incorporates the proposed revised Customer Service Charter;

(iv) That a recommendation is made for a proposed timescale to switch from Siebal to e casework.

7. Proposals and Details

Why we should use e casework

- Minimum time investment and quick updating via e mail – once users fully trained & system adapted to suit Council processes;
- Compatibility with other applications – e.g. Outlook, Microsoft word ???
- Easy & efficient way to track casework – subject title, date or name search;
- Individual or authority-level presentation – user can select which Members & officers need to see the case history/action taken;
- Reports on department response times;
- Highly secure for storing sensitive information;
- Experienced team for technical support through support line to soft ware company.

e - Casework Project Time Line

Early discussions had established that only a small number of Members have ever been trained in the use of Surgery Connect and that most members have implemented 'workarounds' which circumvent Surgery Connect. Of those Members that do use the system, the vast majority telephone in details via the RBT contact centre, rather than input the details themselves; in addition, there are variations in the way that Member casework is handled by Directorates.

19 November 2008 - A member/officer project group met for the first time. The group discussed the case in favour of using e Casework and 11 members were put forward as an e Casework trial/consultation group.

18 December 2008 – A report to the Member Training Panel where discussions around the corporate issues set out below were discussed. The Member Training Panel directed:

“That the free trial of the e Casework system is taken up and the trail/consultation group review it and feed back to a future meeting of the Member Training and Development Panel.”

Member and Officer briefing sessions were held on 24th & 25th February respectively, with training for participants taking place week beginning 9 March 09. In this first round of training 9 members plus a small number of officers from each directorate attended the sessions.

16 March 2009 – the trial commenced for a period of 3 months until 16 June 2009.

16 April 2009 – an update to Member Development reported that 40 cases had been put through the e casework system to date, covering operational issues across all Directorates. Evaluation of the trial showed that more cases were needed to be reported through the system in order to see how useful it could be, with further training being offered to Members and Officers. The trial group quickly discovered that most of the problems around casework were related to process and procedural issues and the lack of any corporate standard.

Members of the Training Panel supported:

- the purchase of the e casework system;
- extending the trial to more Members who wished to use the system to generate more cases through this software;
- additional training for Members and Officers;
- the need for Councillor Surgeries to be included in the Council's customer charter.

19 & 20 May 2009 – Officer and Member e casework training - undertaken by the Porism software company. The training was attended by a further 10 Members plus 2 from original pilot group. The training also provided a follow up session for 11 officers. The sessions were very useful and feedback was gathered from users on how effective the software was proving to be and suggestions for software additions and amendments, many of which have now been incorporated into the system. The key issues are discussed below.

21 May 2009 – meeting with Cllr Wyatt and Customer Access Client Officer to discuss the new Customer Service Charter. The outcomes from this meeting were proposals to include standards for the management of Councillor Surgeries in the Charter and incorporate surgery response times in the quarterly performance reports to PSOC. It was also recognised that a Corporate

It is suggested that the Customer Service Charter include the following and that the e casework software be updated to reflect the revised Charter:

- 3 days acknowledgement to a new case;
- 10 days – full written response which either resolves the case or sets out current position in relation to the issues;
- Resolution and case closure or, 6 weekly written updates to client with explanation of progress and factors influencing or hindering resolution;
- 6 months was suggested as a maximum timeframe to resolve and/or close a case having communicated to client static position.

Currently the e casework system only allows Members to authorise case closure. This has been discussed at length in training sessions and Members are agreed that they would wish this status to continue. However, Members would be responsible for communicating this action to officers through the e casework system.

Given that the e casework system is capable of producing reports based on selected criteria, such as directorate or case subject for instance; it is suggested that quarterly performance reports are incorporated into the PSOC agenda's alongside Corporate Complaints.

Corporate Issues arising from e casework

- The need for a corporate policy framework for the management of councillor surgeries;
- Definition of a "case". Guidelines are required to distinguish councillor surgeries from complaints or requests for service in the first instance;

- Encouraging more Members to use the surgery reporting system – there is an acknowledged resistance to using IT;
- An agreed end date for the use of the current Siebal system and switch over to e casework;
- More training for Members in the basic IT skills needed e.g. typing;
- Identification of officers across the Council who will require training to support the system and a programme to roll this out.
- Cost and value for money
- The need for a glossary of services within e casework;
- Longer term assessment of how the system improves customers satisfaction;
- Member choice to use other routes for reporting councillor surgeries and ensuring that these are still captured within the system;
- Impact on Councillor/officer relationship
- The need for Councillors to have a multi skilled approach.

ICT to Support Member Casework

The RMBC ICT Strategy (2008 to 2011) was published in 2008 after extensive consultation. The ICT Strategy is supported by a £14m capital budget. The strategy is available on the RMBC website. The various projects that make up the Strategy are governed and monitored through the e Government Board which is chaired by the Cabinet Member for Resources. The ICT Strategy and budget was approved by Cabinet and CMT prior to publication.

One of the themes of the ICT Strategy is concerned with Member's use of ICT with £193,000 being allocated to this theme during the 3 years (2008 – 2011). Specifically the ICT strategy sets out the following goals relating to Member use of ICT:

- Enable elected Members to gain access to, and use, modern technology in support of their role as Community Leaders.
- Create skilled, technology confident elected Members through investing in learning, development and training opportunities.
- Through the strategic use of technology, provide elected Members with information relating to their ward at a time appropriate to their needs.
- Enhance the Council's ability to enable citizens to take part in the democratic process; using the Customer Access Strategy as the basis of this widening of choice.
- We will provide elected Members with high-speed, secure and supported broadband, and appropriate systems access from a variety of locations, including their homes.
- We will provide planned learning and development to ensure elected Members acquire and update their technology skills to enable them to respond to citizens' demands.

- Enhance the Council's ability to enable citizens to take part in the democratic process; using the Customer Access Strategy as the basis of this widening of choice.
- We will provide elected Members with up-to-date online information about their ward.
- We will produce a menu of options for elected Members to 'get better connected'.
- We will investigate and implement a range of appropriate technology-based consultation tools to improve our engagement with communities and individuals.
- We will review the technology requirements of elected Members on a regular basis.

8. Finance

We are now seeking formal authorisation to proceed with the purchase of e Casework. The system costs £5000 per annum. This amount was planned for and is included in the aforementioned £193,000 which is allocated to the improvement of Member's ICT.

The incumbent Siebel Casework system costs £20,000 per annum and we are seeking authorisation to discontinue the use of this system. Migrating to e Casework will, therefore, lead to a net saving to RMBC of £15,000 per annum.

It is not yet clear what the revenue implications will be, particularly with respect to any process changes that may be needed in the back office to improve the quality and timeliness of officer responses. This information will be included in a future report.

9. Risks and Uncertainties

By not taking advantage of new electronic communication and casework management technologies, the Council risks offering a slower, lower quality service to the Citizen whilst declining the opportunity to improve efficiencies and make casework easier to deal with for Members and officers alike.

10. Policy and Performance Agenda Implications

Community Strategy – 2005 – 2010

Communities in Control 2006

ICT Strategy 2008 – 2011

11. Background Papers and Consultation

Improving the information on our website and providing Members with ICT which meets their needs are core themes of the new ICT Strategy:

<http://www.rotherham.gov.uk/graphics/YourCouncil/RMBC+ICT+Strategy.htm>

Contact Names:-

Richard Copley
ICT Strategy and Client Co-ordinator
(33)6538
richard.copley@rotherham.gov.uk

Bronwen Moss
Scrutiny Adviser
(82)2790
bronwen.moss@rotherham.gov.uk