

## **Message from the Chair**

Thank you to all my colleagues in SW Councils for their support over my first interesting year as Chair. I have been pleased that we have been able to undertake some joint lobbying to support beleaguered authorities and their communities during the flooding crises over the last year. The flooding has also enabled us to showcase our skills as we have time and time again demonstrated that we can respond quickly and effectively however difficult the circumstances. By working together we were able to present a stronger case across the whole of the South West all of which suffered over the winter and this impacted on the positive response by Ministers. It was a real tribute to joint working that we were able to re-open our rail lines so quickly and keep the South West "Open for Business". We need to keep the pressure on to ensure we are not forgotten.

Our close work with the national LGA has continued and we have welcomed Sir Merrick Cockell, Chair; David Sparks, Deputy Chair and Carolyn Downs, Chief Executive to a number of meetings as well as co-hosting some regional events. I am learning to network and am making sure that the views of the South West are being heard in the corridors of

# South West Councils Annual Report 2013/14

I am delighted all 41 Authorities continue to work together in SW Councils and that 100% of them and all of our Associate member organisations have benefitted from our Core Service provision of HR Advice and Learning and Development support.

This year was the first time that there was a formal survey of South West Councils' customers. It was reassuring to know that most of our customers are satisfied as you will see from the results in this report but I have also asked the team to keep reviewing what they offer and how that might be refined to suit our needs and our limited budget!

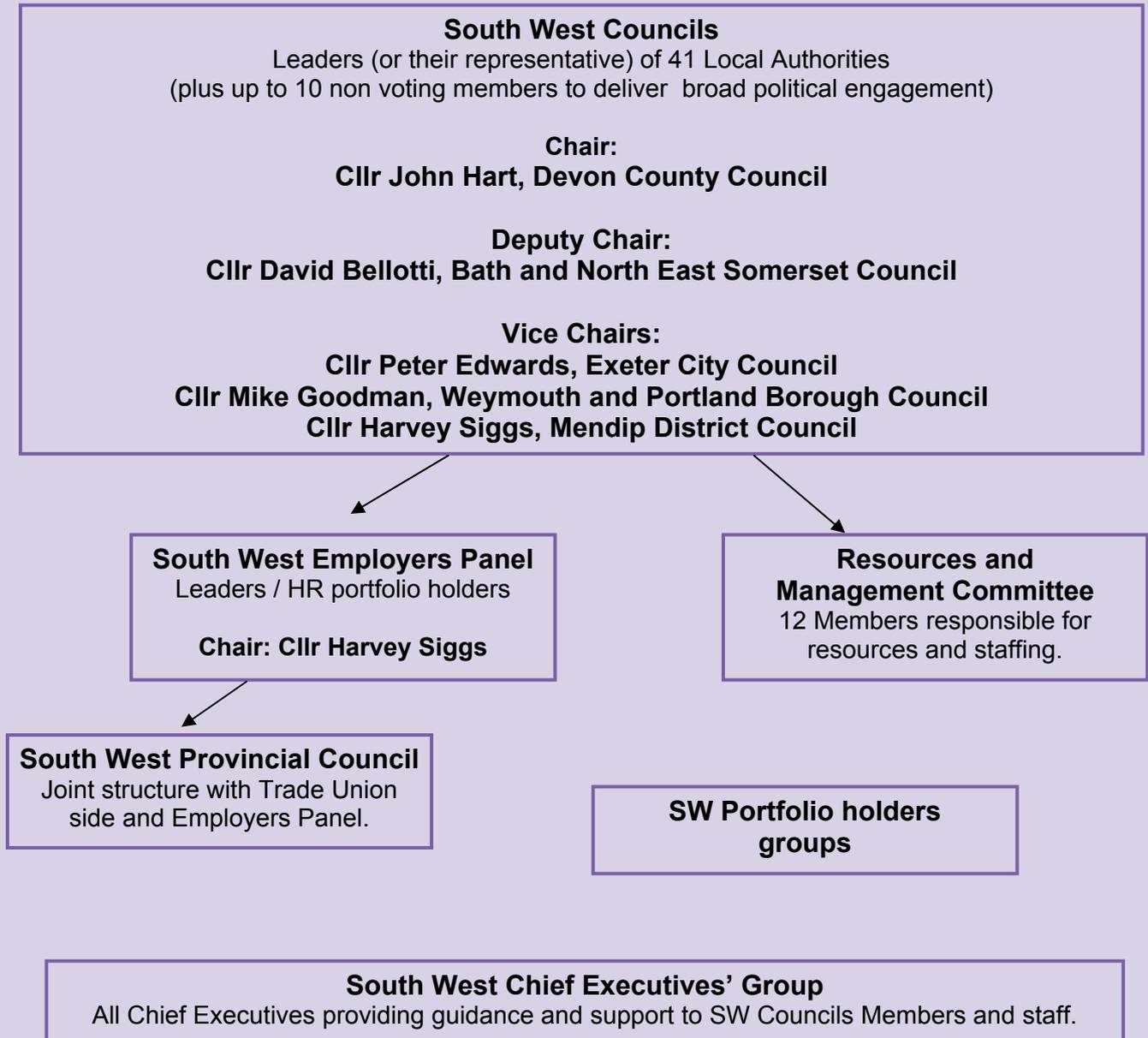
**Cllr John Hart, Leader Devon County Council**

## **Customer Survey Comments:**

*"SW Councils punches above its weight. Its networks and relationships far outweigh what could reasonably be expected given the level of resource available."*

*"I always appreciate the skills and experience of SW Councils staff. Whether it's for training, networking, coaching or general advice."*

## South West Councils' Member Structures



Our **three key overarching objectives** in supporting Members and delivering our work:

Supporting member authorities as Employers, encouraging improved performance and capacity across the region through the provision of high quality HR advice and support, and the sharing of accessible information and knowledge on a range of relevant issues.

Assisting member authorities and associate members to enhance capacity and service delivery through developmental activities for improved performance and efficiency.

Supporting authorities in sharing best practice and knowledge and in having a South West voice, built on consensus, on issues on national policy and funding, working with the national Local Government Association, when this is deemed appropriate by Members.

## Summary Achievements

## Success Indicators

### Human Resources Services

- \* Local Authorities advised on comprehensive employment and human resource issues including employment conditions and rights
- \* Local Education Authorities supported and advised on Teachers' pay and terms and conditions and non teaching staff issues
- \* Continued provision of hot line for HR advice taken up by authorities and associate members with over 4500 phone calls/emails
- \* Recruitment support and advice on Chief Executive, Director and other appointments including provision of a range of recruitment services including psychometric testing
- \* Members advised on sensitive and confidential employment issues
- \* Supported Members with Chief Executive and senior staff appraisal
- \* Supported Members and Chief Executives with organisational reviews
- \* Undertook surveys on HR issues on items of key concern to member organisations and information shared with authorities on a range of subjects such as absence data, salary benchmarking and comparison of posts; car allowances; voluntary redundancy payment and creative approaches; living wage; conflict of interests; use of social media in recruitment; BPSS checks; length of the working week; employee assistance programmes etc
- \* 30 authorities have signed up to EPaycheck, the online pay benchmarking system.
- \* A new mediation and conflict resolution service has been launched, with SW Councils now equipped to advise organisations on whether mediation is appropriate or support mediation through a trained mediator. Services have been used already by two local authorities.

◆  
100% of customers rated HR consultancy services as good or excellent

◆  
51% of local authorities and 27% of associate members received specialised 'not for profit' services

◆  
Assisted with 10% of SW Chief Executives' appraisals

◆  
41 surveys completed

◆  
83% agreed or strongly agreed that they felt they were treated as valued customers

*"Your employment services division are excellent. They always provide considered, unhurried and sound advice.... I have nothing but praise for them"*

*"You did a terrific job; giving clear and practical advice at all stages of the recruitment"*

*"Epaycheck report was quick and easy—I was amazed"*

### What our customers said

*"We benefited greatly from your experience and from the SWC charm and 'nothing is too much trouble' attitude that makes you all such a pleasure to work with."*

## Summary Achievements

## Success Indicators

### Learning and Development Services

Supported ongoing Councillor Development working with other partners including the national Local Government Association

Provided high quality learning and development opportunities which:

- \* met the needs of member organisations in delivering ongoing “core” training services in areas including:

Councillor Development

Waste Management

Management & Business Planning

Gypsies & Travellers

Local Government

Coaching & Personal Development

Legal & Finance

HR & Employment Services

Training & Assessment

- \* retained National Accreditations and recognition
- \* provided of high quality accredited training to 226 learners

Through the SW Coaching and Mentoring Pool supported the development of coaching and mentoring as a cost effective development tool. The Pool enabled:

- \* reciprocal coaching with 120 Coaches in the Pool
- \* ongoing CPD and supervision support to maintain the quality of coaches



1 authority successfully re-assessed for Member Development Charter status



84% ratings excellent on effectiveness of learning



An increase of 919 training days delivered



26 organisations in SW Coaching and Mentoring Pool



80% of coaching interventions evaluated as making a positive contribution to organisational outcomes



£21,250 saved on coaching interventions and £4,500 savings on CPD

## What our customers said

*“the Charter and the support received from South West Councils has provided an excellent framework”*

*Coaching Pool: “This has been a great opportunity to receive top quality coaching from outside my own organisation”*

*South West Councils “provided bespoke training course to middle managers in a very flexible and cost effective way”*

*ILM external verifier: ‘A well run professional centre’ and South West Councils has ‘comprehensive internal verification processes in place’*

**Key work activity**

**Success Indicators**

**Advocacy, best practice sharing, policy and partnership working**

Brought together authorities to share information and influence policy development such as pay and pensions and undertake lobbying on issues of concern across local authority boundaries.

Supported SW Chair on LGA Executive through briefings etc based on input from all SW Authorities

Opportunities for effective co-ordination and sharing of expertise, ideas and effort maximised with the national Local Government Association, other regions and partner organisations within the South West.

Facilitated collaboration, the spread of best practice and information sharing through support for meetings and networks with both face to face meetings and virtually through provision of confidential web based/ electronic discussion group for Members and Officers including:

SW Councils meetings

SW Employers Panel

Resources and Management Committee

Member networks as required e.g. Children’s and Adults Services portfolio holders; Scrutiny Members etc

Chief Executive Group

Heads of HR and Public Service People Management Association Network

Education Personnel Officers

HR Public Health Leads

Reward Group

L&D Officers Network

Member Development Officers

SW Procurement Group

SW Equalities Network

Coaching Champions

Conferences held:

- Annual Pension Managers’ Conference attracting national delegates
- HR Conference (jointly with PPMA) attended by Directors of HR and their teams. Over 40 delegates each day
- Education HR Conference with 62 delegates
- Annual Coaching Conference



Press Releases issued on flooding and transport infrastructure



Joint South West Councils and LGA events : ‘Rewiring Public Services’ and ‘Making Your LEP Work’



Level of engagement maintained through 48 member and officer meetings and networks



19 networks use the secure web based area for discussion and file sharing purposes



Delegate numbers at conferences increased by 5%

**What our customers said**

*Pension Managers Conference: “very valuable conference, professionally organised and run with exceptionally high quality speakers”; “a well run event that delivers year after year”.*

*“The networking groups are excellent and really help us to understand how others are working with some of the same issues”*

*PAs Conference: “Very informative and inspirational” & “thoroughly enjoyable and insightful”*

*Coaching Conference: “I enjoyed all of the keynotes — learnt a lot!”*

## Key work activity

## Success Indicators

### Communications and Marketing

Supported member organisations through information gathering and sharing including

- regular production of e-bulletin SW News for all organisations
- Introduction of quarterly production of Associate newsletters

Spreading of information about core and not for profit services was more effective through:

- better use of electronic communications including development of social media marketing tools
- use of targeted material including case studies to demonstrate benefits
- use of Members and other customers to “spread the word”

### Corporate

Financial management delivered accurate financial forecasting and budgeting

Core services were maintained “free” as part of the subscription

Income generation was maximised from other services including the use of assets

Core costs minimised through ongoing efficiency measures

All employees supported to achieve their full potential and to ensure wellbeing of the workforce

Continued compliance with financial and legal responsibilities around health and safety, human rights, equalities, discrimination, freedom of information etc

◆  
SW E-bulletin and new Quarterly Associate newsletter produced

◆  
0 to 200 Twitter followers

◆  
89% of survey respondents said they have recommended at least one service

◆  
Budget was delivered within 1.1% with £1,022k income generated

◆  
Debt written off below 0.01%

◆  
Compliance requirements met and Certification Officer approval maintained

### What our Members and other customers said:

*“I always appreciate the skills and experience of SW Councils staff. Whether it’s for training, networking, coaching or general advice”*

*“Always delivered professionally, to a high standard. A trusted friend.”*

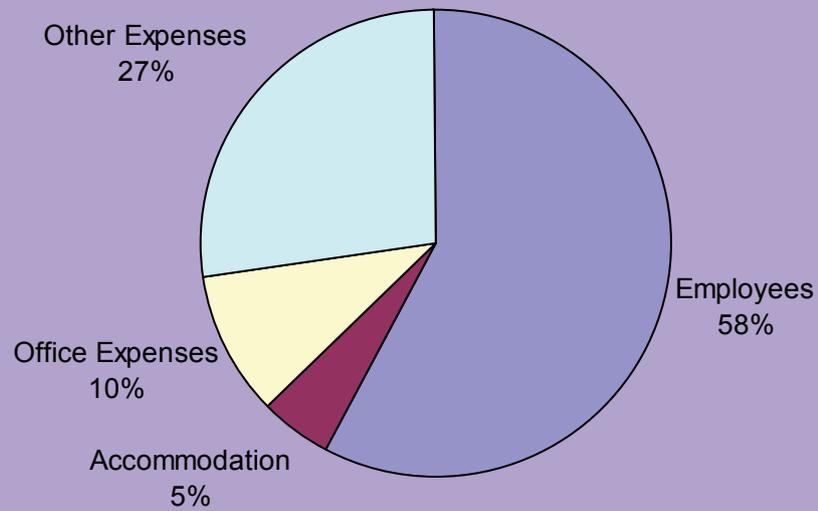
*“I’m delighted and relieved to have rediscovered your services”*

*“Excellent financial management and the development of new business opportunities has enabled the organisations to move forward effectively”*

## Expenditure Breakdown for 2013/14

Total Expenditure

£1.174m

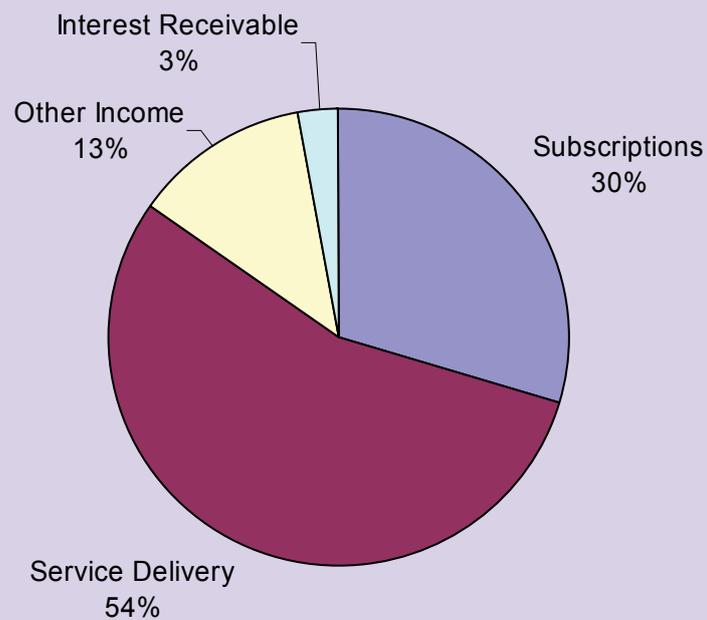


- Annual PA and Executive Assistant Conference

## Income Breakdown for 2013/14

Total Income

£1.022m



## What else did our customers say about us in 2013/14

'I am happy to say that the service we received in relation to the psychometric testing has been efficient, friendly and much appreciated.'

"The service I have received from South West Councils has been consistently excellent: timely, reliable and helpful and I speak as someone who frequently seeks advice and information."

*On the Bribery Act: Feb 2014:*

"Raised awareness and directed me to follow policies and procedures in place."

*On Level 2 Award in Facilitation Skills: Oct 2013:*

"I will be able to make more effective use of group discussion time and gain more relevant outcomes."

*On Gypsies and Travellers – Managing Sites: October 2013:*

'Its give me a better understanding of legislation and provided me with a number of useful contacts and good practice literature.'



*The Resources and Management Committee and some of the SW Councils Team*

My thanks to everyone at SW Councils for their help and support with this great project and in particular your faith in us!

".. many thanks for today, it was a great training session, we look forward to getting the system up and running as soon as." *Epaycheck user*

*On the ILM Level 5 in Coaching: April 2013:*

"It is very focused and the time away from the office ensures that you are engaging with the right frame of mind and attention. The mix of practical application and theory was spot on which made it very enjoyable. It exceeded my expectations."

*On Committee Administration: Jan 2014:*

"I really enjoyed the course and gained further insight which I hope to take forward in order to improve my role as a committee officer."

"Well informed and helpful. Good at diagnosing the problem and giving relevant information"

"I would just like to say that as a regular user of the services of SW Councils, I have been consistently impressed. The quality and timeliness of the advice and information I have received has been excellent. It is a pleasure to do business with SW Councils."

### **Customer Survey Other Key Findings:**

The survey highlighted areas for SW Councils team to work on—in particular there was a desire to see more innovation in the services provided. It also highlighted areas of strength.

87% of customers satisfied or very satisfied with the quality of our services

89% rated customer service as good or excellent

76% agreed there was a high quality workforce (the rest were neutral).