

## Appendix 7B – Peer Support Review Action Plan

Theme 1: Recruitment and retention of an appropriately experienced, skilled and diverse cohort of peers			
Actions	Status	July Update	December Update
<p>1 Ensure that the member peer pool and usage keeps pace with the national councillor census in terms of demographic profile:</p> <ul style="list-style-type: none"> <li>• Circulate peer profiles to all members for updating with guidance for completion</li> <li>• Analyse updated peer profiles and decide on areas for more proactive recruitment of Member Peers</li> </ul>	<p>Will be live in January 2024</p>	<p>Data on peers who supported CPCs has been shared in our annual report. Work to enable and prompt update of peer profiles to include richer detail including equalities information has been progressed (see action 26).</p> <p>This will allow us to understand the current demographic profile of our peer pool and decide on what further measures are required.</p>	<p>Data on peers who supported CPCs has been shared in our annual report. Work to enable and prompt update of peer profiles to include richer detail including equalities information has been progressed (see action 26).</p> <p>A long term solution which will automatically prompt peers to update their peer profiles is scheduled for completion by end of December 2023 following a commissioning process and necessary testing. In the interim an approach was designed and planned however, in implementation did not work with existing CRM software.</p> <p>The long term approach will allow us to further understand the current demographic profile of our peer pool and decide on if further measures are required.</p>

2	<p>Lead Members consider whether there should be any changes to the limit on the number of assignments (or days) any member peer should be used</p>	<p>End of May 23 - Complete</p>	<p>It was agreed by Lead Members in discussions in February that peers should be used for a max of 40 days. Exceptional instances where members would need to be used beyond the max of 40 days would need approval by the Director of Improvement. Wider actions to improve our monitoring and systems will help regulate this agreement.</p>	<p>It was agreed by Lead Members in discussions in February that peers should be used for a maximum of 40 days. Exceptional instances where members would need to be used beyond the maximum of 40 days would need approval by the Director of Improvement. Wider actions to improve our monitoring and systems, through the improvement protocol, will help regulate this agreement.</p>
3	<p>Ensure a good, sustainable 'supply line' of member peers:</p> <ul style="list-style-type: none"> <li>• Lead Members consider feedback from programmes about gaps in member peer capacity to meet current and future demand</li> <li>• Lead Members identify and share best practice in peer recruitment across Groups</li> <li>• Improvement/ PGOs develop joint programme of work</li> </ul>	<p>End of November 23 - Complete</p>	<p>An initial sharing of best practice in peer recruitment was completed through discussions that took place in February 2023. A further sharing of best practice will occur at a later board this year.</p> <p>Following agreement of the 23/24 sector support programme it was confirmed that the core improvement grant would only fund Corporate Peer Challenges, Governance Peer Challenges and Finance Peer Challenges in terms of the peer challenge programme. This has minimised gaps in peer capacity.</p>	<p>Following agreement of the 23/24 sector support programme it was confirmed that the core improvement grant would only fund Corporate Peer Challenges, Governance Peer Challenges and Finance Peer Challenges in terms of the peer challenge programme. This has minimised gaps in peer capacity.</p> <p>An improvement protocol (action 25) has been drafted for agreement with PGOs and Lead Members. This is to be implemented alongside a planned renewed approach to peer development and challenge (action 18) as part of a joint programme of work. This will help ensure we get the right peers. The LGA will continue to produce an annual review of our CPC activity, this will include a peer stocktake to review the skills, training and background of our peers to</p>

				<p>ensure the LGA has the peer pool required to deliver critical SLI activities.</p> <p>PAs have been aligned with each PGO to discuss emerging challenges and to share practice including on peer recruitment.</p>
4	<p>Brief regional teams/ programme leads on criteria and processes for selecting member peers</p>	<p>End September 23 - Complete</p>	<p>Per actions below (quality assurance), we have established a number of new measures to join up improvement activity. This will help inform this action to be delivered by September.</p>	<p>Internal teams are continually briefed on process through internal meetings and digital channels. Based on the long term impacts of actions from this review and/or the improvement protocol teams will be briefed again on the process to follow.</p>
5	<p>Review usage of Member peers (including by protected characteristics)</p> <ul style="list-style-type: none"> <li>• Produce annual report</li> <li>• Lead Members review annual report (prior to IIB)</li> </ul>	<p>End of May 23 - Complete</p>	<p>Our peer support team have completed an Annual Report on LGA Corporate and Finance Peer Challenges which has been reviewed by Lead Members.</p>	<p>Our peer support team have completed an Annual Report on LGA Corporate and Finance Peer Challenges which has been reviewed by Lead Members. This will be produced annually including a peer stocktake per action 3 above.</p>
6	<p>Consider the respective roles of the Group Office and the Improvement directorate in addressing challenges related to the supply and development of Independent member peers.</p>	<p>End of July 23 - Complete</p>	<p>Following elections and changes to council political alignment the need for independent peers has altered. Work is being undertaken to respond to these changes including a proposed working group to be commenced in near future.</p>	<p>The South West Principal Adviser has been identified to be a liaison between Improvement and the Independent Political Group Offices (PGOs) to help address challenges related to peers and wider aspects. The PGO continues to manage this challenge to effectively</p>

				promote for and recruit peers to provide effective support.
7	Session at conference to raise awareness of opportunities to become a member peer	End of July 23 - Complete	<p>The Innovation Zone held a lunch time session at LGA Annual Conference to raise awareness of opportunities to become peers.</p> <p>Additionally, all speakers at the innovation zone were sent information sharing the opportunities being a peers presents and encouraging individuals to look into becoming a peer.</p>	<p>The Innovation Zone held a lunch time session at LGA Annual Conference to raise awareness of opportunities to become peers.</p> <p>Additionally, all speakers at the innovation zone were sent information sharing the opportunities being a peers presents and encouraging individuals to look into becoming a peer.</p>
<b>Theme 2: Mentoring</b>				
8	<p>Ensure coordinated development, quality assurance and promotion of the mentoring offer:</p> <ul style="list-style-type: none"> <li>• Draft proposals</li> <li>• Lead Members consider proposals</li> </ul>	End of October 23 - Complete	<p>This action is linked to the wider work of the peer support review including the new systems of monitoring impact, training and refreshed resources. Per below these are being progressed.</p>	<p>Mentoring training has been updated to enhance and better coordinate mentoring and ensure impactful support provided. Relevant papers and processes have been regularly run by lead members for feedback.</p> <p>To reflect modern practices and utilises several coaching and mentoring models, such as GROW, The Trust Equation and The Gibbs Reflective Practice model have been incorporated. As well as referencing the LGA's new Local leadership Framework. The models used in the training are then balanced with practical advice and exercises on political</p>

				mentoring to equip member peers attending with the skills and capabilities needed to provide effective mentoring to other elected members in councils across England.
9	Relaunch and promote the current mentoring handbook and training, updated as appropriate (interim measure)	End February 23 - Complete	The LGA has updated and re-launched the existing mentoring handbook and shared this with Political Group Offices and regional teams for further distribution.	The LGA has updated and re-launched the existing mentoring handbook in February 2023 and shared this with Political Group offices and regional teams for further distribution.
10	Revise and refresh the mentoring handbook and mentoring training	End of October 23 - Complete	The LGA is finalising process of commissioning a supplier to update handbook and refresh mentoring training with view to have in place by October.	The revised and refreshed handbook has been published and can be found here. <a href="https://www.local.gov.uk/publications/councillor-mentoring-handbook">https://www.local.gov.uk/publications/councillor-mentoring-handbook</a>
11	Offer mentoring training 4 times a year to ensure peers can access prior to commencing assignments	End May 23 - Complete	Dates have now been scheduled for mentoring training for peers throughout 2023/24. These are due to take place in September, December 2023 and March, June 2024 and will be a mixture of in-person and online sessions  The first mentoring training session took place in May (See main paper for detail).	Dates have now been scheduled for mentoring training for peers throughout 2023/24. These are due to take place in September, December 2023 and March, June 2024 and will be a mixture of in-person and online sessions

12	Put in place a structured process for recording and monitoring member mentoring	End May 23 - Complete	A new process for recording and monitoring member mentoring has been drafted and shared with regional teams and Political Group Offices.	<p>A new process for recording and monitoring member mentoring has been shared with regional teams and Political Group Offices.</p> <p>The Improvement Coordination and Strategy team has met every PGO and spoken to relevant Programme Support Officers/Regional Advisers to share practice and set out responsibilities related to mentoring and recording activity on CRM. Reporting and recording of mentoring will continue to be assessed as part of regular core improvement grant monitoring.</p>
13	Consider whether a more formal LGA officer mentoring offer would be appropriate and on what model	End October 23 - Complete	Work on this action will be progressed with a further update to be shared in October 2023.	Officer peer mentoring across the LGA has been mapped across the regional teams and beyond. In the regional teams the process often takes a 'brokering' approach. Following consideration, Leadership will produce guidance on mentoring for officers, drawing on the practice of existing arrangements within the regional teams and beyond, and will clarify process for ensuring officer mentoring arrangements are recorded on CRM.

**Theme 3: Member peer training**

14	Ensure the peer conference includes the opportunity for cross-party reflection on peer practice and updates peers on themes arising from improvement work and relevant issues in the sector	End November 2023 - Complete	A date for peer conference has been scheduled. The agenda, when readied, will ensure opportunity for cross-party reflection on peer practice and update peers on themes arising from improvement work.	Peer conference took place on November 8th and 9th. The agenda for peer conference was developed in collaboration with lead members, PGOs and wider peers to ensure it covered themes arising from improvement work and wider issues affecting the sector.
15	Agree a standard approach to peer induction and include in updated peer induction pack for all peers	End September 23 - Complete	As part of the new approach to Member Peer Mentoring and training for the delivery of CPCs, Improvement Officers working with the Political Group Offices will develop an induction pack and process for all peers.	Following consideration of the LGA's approach to peer induction, the peer induction pack is being updated to reflect improvement activity today.
16	Discuss and agree a protocol for the use of shadow member peers on peer challenges	End February 23 - Complete	The LGA has agreed to pilot a peer challenge shadowing process for member peers on a non-payment basis. This has been agreed by all four Political Group Offices with a draft protocol produced. Dates are being agreed to pilot.	The LGA has agreed to pilot a peer challenge shadowing process for member peers on a non-payment basis. This has been agreed by all four Political Group Offices with a draft shadowing protocol produced. Dates are being agreed to pilot with several scheduled.

<p>17</p>	<p>Consider approach to eligibility for assignments for example:</p> <ul style="list-style-type: none"> <li>• all member peers to attend the peer conference at least once every three years to be eligible for assignments</li> <li>• some mandatory elements to training and development of peers</li> <li>• Lead Members consider PGO response</li> </ul>	<p>End May 23 - Complete</p>	<p>Through discussions in February, it was agreed with lead members, the IIB and PGOS that unless special circumstances were in place all member peers would be expected to have attended or booked onto relevant peer training and to have attended a member peer conference at least once in the last 3 three years.</p>	<p>Through discussions in February, it was agreed with lead members, the Improvement and Innovation Board and PGOS that unless special circumstances were in place all member peers would be expected to have attended or booked onto relevant peer training and to have attended a member peer conference at least once in the last three years.</p> <p>Further process will be introduced as part of the renewed approach to peer development which will look to target training and support based on peer experience and engagement with previous development opportunities. The draft improvement protocol also sets out a number of agreed principals to regulate this work.</p>
<p>18</p>	<p>Agree an approach to ownership, development and commissioning of member peer development</p>	<p>End September 23 - Complete</p>	<p>To be reviewed as part of the evaluation of the first tranche of member training in 2023/24.</p>	<p>A paper on a renewed approach to peer development has been provided to lead members, PGOs and national member peers for consideration. Considerations from this paper will inform the LGA's approach to member development. This approach to be shared with members in upcoming boards</p> <p>Ownership for peer development is currently split between a number of parties including PGOs, the Head of Leadership, National Programme</p>



				Manager and Director of Improvement. Roles and responsibilities are now set out in the draft improvement protocol.
19	<p>Deliver sufficient training to ensure that all member peers have received training (or committed to attend) before deployment:</p> <ul style="list-style-type: none"> <li>• Corporate Peer Challenge</li> <li>• Other peer reviews</li> <li>• Mentoring</li> </ul>	End December 23 - Complete	<p>The LGA is working to develop a new programme of Mentoring and Peer Challenge training for member (and officer) peers. This will include a strong focus on the delivery of Corporate Peer Challenges and supporting those Councils that have had a change of control.</p> <p>A process of training delivery has been agreed with PGOs and sessions are now being scheduled.</p>	<p>Training, with a renewed focus corporate peer challenge, has been developed with dates scheduled going forward. Two sessions have already been delivered with further sessions this financial year to take place on 16th January and 21st January 2024.</p>

Theme 4: Quality assurance				
20	<p>Agree proportionate and systematic approach to feedback from regional teams/ programmes to PGOs on member peer performance/ communicate PGO approach</p>	<p>End May 23 - Complete</p>	<p>The LGA has introduced a number of measures to more effectively capture feedback on peer performance, this includes establishing an internal Peer challenge managers meeting to share arising challenges and notable practice.</p> <p>Additionally, each PGO now has a main PA contact to strengthen links with improvement and allow more direct communication regarding peers.</p> <p>Feedback on Member Peer performance is also provided to the relevant PGOs on completion of each Corporate Peer Challenge. These new measures will continue to be reviewed and established.</p>	<p>The LGA has introduced a number of measures to more effectively capture feedback on peer performance, this includes establishing an internal Peer challenge managers meeting to share arising challenges and notable practice.</p> <p>Additionally, each PGO now has a main PA contact to strengthen links with improvement and allow more direct communication regarding peers.</p> <p>Feedback on Member Peer performance is also provided to the relevant PGOs on completion of each Corporate Peer Challenge. These new measures will continue to be reviewed and established as included in the improvement protocol.</p>
21	<p>Consider whether to introduce some form of Performance appraisal for member peers:</p> <ul style="list-style-type: none"> <li>• Liaise to consider potential for a more systematic approach</li> <li>• Lead Members consider proposals</li> </ul>	<p>End July 23 - Complete</p>	<p>In the February 2022 meeting, a standard timescale of 10 days was agreed with Political Group Offices to respond to peer requests and resilience arrangements. As per action 20 measures have been introduced to better capture feedback and establish stronger connections between PGOs and Improvement. Now in place, considerations can be made to allow for a more systematic approach.</p>	<p>A paper on a renewed approach to peer development, was provided to lead members, PGOs and national member peers for consideration.</p> <p>This work has been furthered by the draft improvement protocol (see action 22) which sets out roles and responsibilities around peer performance.</p> <p>PA liaisons have been set up for each</p>

			<p>The LGA is committed to producing a written report covering the details on this systematic approach including recommendations to give more feedback into performance appraisal. (See main paper for detail)</p>	<p>PGO to ensure streamlined discussion between PGOs and regional teams on improvement matters including peer performance.</p>
22	<p>Consider whether to reintroduce some form of peer accreditation/ assessment process in light of associated costs and benefits</p>	<p>End July 23 - Complete</p>	<p>As part of our ongoing conversations with Political Group Offices, we are exploring the opportunities to provide some form of performance appraisal and/or accreditation to peers. We will be carefully considering the cost benefit implications of introducing this once we have clarity following the 2023/24 Sector Support Programme DLUHC grant negotiations. With this in mind, we have updated the deadline to make feasible in order to consider these factors.</p> <p>The LGA is committed to producing a written report covering the details on this systematic approach including recommendations to give more feedback into performance appraisal. (See main paper for detail)</p>	<p>A paper on renewed approach to member peer accreditation and development was provided to lead members, PGOs and national member peers for consideration. In this meeting it was agreed the former process for accrediting peers was not feasible due to resource constraints.</p> <p>This work has since been furthered by the draft improvement protocol which asks for agreement that all PGOs conduct interviews with member peers as a part of peer recruitment. Pending agreement, a formal process and approach will be formulated to action this approach.</p>

**Theme 5: Management and administration**

23	Produce process notes on allocation and authorisation of days	Process to be continued through improvement protocol pending agreement	<p>It was agreed by Lead Members in discussions in February that peers should be used for a max of 40 days. Exceptional instances where members would need to be used beyond the max of 40 days would need approval by the Director of Improvement.</p> <p>Notes to clarify the regulation of this are in production and will be finalised by the next board.</p>	<p>Further work is required in this area to ensure clarity on process and clear ownership set out enabling more effective oversight of peer allocation and reimbursement.</p> <p>A note on a possible approach is included in the draft improvement protocol being shared with lead members. On agreement, follow up actions will be developed to ensure the LGA has appropriate oversight on the allocation of peers. (see action 25)</p>
24	Ensure compliance with GDPR on all peer records	Will be complete by end of December 2023	Improvement are in touch with programmes to ensure peer records are compliant with GDPR. The vast majority of peer records meet requirements and conversations have now taken place and will continue with those outstanding.	<p>Improvement are in touch with programmes to ensure peer records are compliant with GDPR. The vast majority of peer records meet requirements and conversations have now taken place and will continue with those outstanding.</p> <p>Partners in Care and Health have collated a complete list of Peers and Contractors and have begun to draft an online form allowing all records to be moved to the CRM to comply with GDPR. This work will be finalised by end of December. Usage of CRM will continue to be expanded to ensure our data records are accurate and stored</p>

				appropriately.
25	Develop a PGO/ Improvement Support Protocol to clarify roles and mutual expectations	End December 23 - Complete	A protocol will be developed based on learning and insight gathered as a result of the delivery of the overall peer support review actions.	An improvement protocol has been drafted and shared for agreement with PGOs and lead members. The protocol consists of a series of commitments to improve operations between improvement and PGOs and ensure relevant work is joined up where appropriate. The protocol also clarifies clear roles between improvement and PGO of shared actions.
26	Support the regular updating of member peer profiles through: <ul style="list-style-type: none"> <li>• Agreeing common standard for frequency of updates</li> <li>• Agree a solution to automate the update process</li> </ul>	Will be live in January 2024	A proposed technical solution (in two phases) to prompt member peers to update their peer profiles online has been designed: the Political Group Offices will be asked to approve the approach prior to implementation. Measures to better monitor overall peer activity, including training and payments, will be introduced in line with work on processes to ensure more effect monitoring and mentoring delivery.  The proposed solution is working on the basis of a rolling 12-month update across member peer profiles.	The proposed solution is working on the basis of a rolling 12-month update across member peer profiles.  The work on the software development for the updating of peer profiles is on track for completion by end of December (see action 1) following a commissioning process and necessary testing. We are planning to schedule a session for the PGOs to review it, so they understand how they support their member peers to use it, in early January, after which it will 'go live'.

27	Agree a standard timescale for PGO response to peer requests and resilience arrangements	End of May 23 - Complete	In the February 2022 meeting, a standard timescale of 10 days was agreed with Political Group Offices to respond to peer requests and resilience arrangements. Work to be carried out through wider peer support review actions to effectively monitor and regulate this.	In the February 2022 meeting, a standard timescale of 10 days was agreed with Political Group Offices to respond to peer requests and resilience arrangements. Work to be carried out through improvement protocol to continue to effectively monitor and regulate this.
28	Establish a consistent process for capturing and monitoring records of attendance at CPC and mentoring training	End of May 23 - Complete	<p>A process is in place to capture attendance at mentoring training on CRM after each event, with the last taking place on the 31 May 2023.</p> <p>A process is already in place for logging attendance of CPC Peer Training on CRM.</p>	<p>A process is in place to capture attendance at mentoring training on CRM after each event.</p> <p>A process is already in place for logging attendance of CPC Peer Training on CRM.</p>
29	Identify a plan to increase the proportion of officer peer records which contain equalities data	End of May 23 - Complete	This is being progressed through Actions 1 and 26 which includes proposed technical solution and approach once data received. It is expected the technical solution will increase the proportion of officer peer records which contain equalities data.	<p>Following a review carried out in at the end of 2022/23 financial year, the LGA had identified a strong record in terms of officer peers who have provided equalities data with 84 per cent of peers providing records.</p> <p>The overall percentage of male and female peers used (both member peers and officer peers) were almost evenly split with 52 per cent of peers male compared to 48 per cent who were female.</p>

				<p>Six per cent of all peers used declared a disability (of those who shared monitoring information). This is a rise of 4 per cent from the previous year. Of those who shared monitoring information, 18 per cent said they were from a non-white British background. The LGA will be carrying out an annual stocktake of peers to continue to review performance in this area. Further, consideration will be made to reflect improvements made in member peer profiles (see action 26) in officer records if appropriate.</p>
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