

COPYTHORNE PARISH COUNCIL MEETING – TUESDAY JUNE 11TH 2019

Item 15 – Councillor and Clerk Training

With Cllrs Wiggins and Lee having joined the council with no previous experience of the role of Parish Councillor it is important that we look to provide them with as much support and guidance as possible to enable them to undertake their roles effectively and properly.

The same is the case for me as Clerk/Responsible Financial Officer.

In respect of (new and continuing) councillors some useful outline information has been made available in the form of an electronic (pdf) copy of the Good Councillors Guide and access to web resources from the Hampshire Association of Local Councils (HALC) and the National Association of Local Councils.

Additionally, our two new councillors will be assigned a “mentor” from within the Council to help their development.

To help with my own development, I am gradually building a network of Clerks at other local parish councils who have offered help and guidance when required.

During the 2019/20 Budgeting & Precept setting process the need for training for councillors and Clerk was identified and a sum of £1,000 was allocated within the overall budget for this purpose.

HALC run a number of very useful training courses/workshops for Councillors and Officers to help build knowledge.

For councillors, I have identified seven training courses that various members of the council might find useful and details of all of these are attached. Four of those courses costing a total of £185 are – I believe – relevant for our new councillors to undertake during 2019/20. I have noted these on the attachment. Some of our existing councillors might find some of the courses of interest to them as well.

For myself I have identified and discussed with Cllr Lucas seven training courses/events (details attached) costing a total of £375 that would be of benefit to me, some sooner than others. As a result three have been booked for later this month/early next.

Assuming that the new councillors agree with the four training courses I have suggested then the required identified spend will be:-

Councillor Wiggins	£185
Councillor Lee	£185
Clerk/RFO	£375
TOTAL	£745

Which leaves £255 of the £1000 budget for other councillors for any courses required.

Bookings for councillor courses run by HALC will be arranged by myself using dates provided by councillors.

David Rigby
Clerk/RFO

HALC Councillor Training and Events Programme - 2019

Councillor Development	Local Council Finance for Councillors	Eastleigh BC Room 11/12/13	27/06/2019 18.30-20.30	£45
Councillor Development	Chairing Skills	Eastleigh BC Room 11/12/13	10/07/2019 10.00-13.00	£60
Councillor Development	The Knowledge (Part 1 of 2)	Eastleigh BC Room 11/12/13	03/09/2019 18.30-20.30	£47.50
Development for All	The Planning Framework	Winchester Racquets & Fitness Club	16/09/2019 18.30-21.00	£60
Councillor Development	Local Council Finance for Councillors	Shaw House	17/09/2019 18.30-20.30	£45
Councillor Development	Local Council Finance for Councillors	Eastleigh BC Room 11/12/13	18/09/2019 18.30-20.30	£45
Councillor Development	Core Skills (Part 2 of 2) , completion of The Knowledge (part 1 of 2) req'd.	Eastleigh BC Room 11/12/13	01/10/2019 18.30-20.30	£47.50
Councillor Development	Chairing Skills	Winchester Racquets & Fitness Club	30/10/2019 10.00-13.00	£60
Development for All	An Introduction to Appraisals	Eastleigh BC Room 11/12/13	05/11/2019 10.00-12.30	£45
Councillor Development	The Knowledge & Core Skills (Parts 1 & 2)	Eastleigh BC Room 11/12/13	06/11/2019 10.00-15.00	£95
Information & Networking Event	Hampshire ALC - AGM	Holiday Inn - Winchester	09/11/2019 09.00-13.00	£0
Councillor Development	Chairing Skills	Shaw House	13/11/2019 10.00-13.00	£60
Development for All	Basic Planning for Local Councils	Winchester Racquets & Fitness Club	20/11/2019 18.30-20.30	£45

Possible course choices

Cllr Lucas

Cllr Herra

Cllr Chillcott

Cllr Goodwin

Cllr Hawks

Cllr Wiggins Local Council Finance £45.00 The Knowledge £47.50 Core Skills £47.50 Basic Planning £45 TOTAL £185

Cllr Lee Local Council Finance £45.00 The Knowledge £47.50 Core Skills £47.50 Basic Planning £45 TOTAL £185

Local Council Finance for Councillors

Aims:

This session is designed to give councillors a greater understanding of their duties with regard to the council's finances. Topics include legislation and the national Governance and Accountability Guidance, key concepts and terms, banking and accounting, preparing for end-of-year, the role of the internal auditor and further support. This is an essential session for all councillors.

Session overview:

This session is designed to give councillors a greater understanding of their duties with regard to the council's finances. Topics include legislation and the national Governance and Accountability Guidance, key concepts and terms, banking and accounting, preparing for the end-of-year, the role of the internal auditor and further support. This is an essential session for all councillors.

Session benefits:

By the end of Local Council Finance you will:

- Understand the council's and the RFO's duties regarding financial management
- Be aware of relevant legislation and sources of guidance
- Know how VAT law applies to your council
- Understand how the council's accounts are prepared and audited
- Recognise the importance of internal controls

Session leader:

Steve Parkinson.

- The price includes refreshments and session notes.

Chairing Skills

Aims:

This course provides an introduction to the knowledge, skills and attributes (the tools) needed to become an effective chairman

Chairing Skills provides an introduction to the knowledge, skills and attributes (the tools) needed to become an effective chairman. The session is about equipping you with the knowledge you need to be an effective chairman. Topics include the role and responsibilities of the chairman, the framework in which the chairman operates and relationships with stakeholders. The session will also help you to be a more successful chairman by improving awareness of yourself and others and understanding the role of a leader. This skills development session will assist you as a chairman with running effective meetings, upholding professional conduct, dealing with difficult situations, engaging with stakeholders, maintaining good relationship with the clerk and other employees and effective communications.

Session benefits:

By the end of Chairing Skills, you will:

- Understand the role of chairman including responsibilities and limitations
- Know that preparation before a meeting is key for an effective meeting
- Understand chairing styles and the link with professional conduct
- Have tools to manage the public and the media
- Understand how through effective leadership, a chairman can build effective partnership and engage with the community

Have considered:

- the skills required to chair a challenging meeting – stimulating debate, maintaining focus and managing conflict
- how to assess your members skills
- tools for effective influencing, facilitation and control of meetings
- questioning and listening skills

Session leaders:

Jon Brown, Vendy Treagust. Price includes refreshments and session notes.

The Knowledge (Part 1 of 2)

Aims:

'The Knowledge' session is designed to be an introduction to being a councillor. It will give you the knowledge and signposts to further information to enable you to be more effective in your role. Topics include the context and role of parish or town councils and that of its councillors, the legal and regulatory framework, meetings and procedures, council services and assets, community engagement/action and tools for you to use, including a jargon buster and sources of further information.

You must also book Core Skills (Part 2) in conjunction with this event

Course overview:

'The Knowledge' session is designed to be an introduction to being a councillor. It will give you the knowledge and signposts to further information to enable you to be more effective in your role. Topics include the context and role of parish or town councils and that of its councillors, the legal and regulatory framework, meetings and procedures, council services and assets, community engagement/action and tools for you to use, including a jargon buster and sources of further information.

Course benefits:

By the end of The Knowledge, you will:

- Have a good understanding of your role as a councillor and the context in which you operate
- Know the rules of what you must, or must not do, as a council, councillor, employer and financial manager
- Understand the legislative and regulatory framework for councils, which will help you stick to the rules
- Understand more about the structure of meetings and the protocols observed by councils
- Know more about the role of the councillor as a representative and the two-way communication process between councils and residents
- Have a toolkit to help you with being an effective councillor

Course leaders:

Jon Brown and Amy Taylor.

Price includes refreshments, session notes and a copy of 'The Good Councillor's Guide'

Core Skills (Part 2 of 2)

Aims:

The 'Core Skills' session is designed to build upon the information learned in 'The Knowledge' session, by developing the skills needed to be an effective parish or town councillor.

You must also book The Knowledge (Part 1) in conjunction with this event

Course overview:

The 'Core Skills' session is designed to build upon the information learned in 'The Knowledge' session, by developing the skills needed to be an effective parish or town councillor.

This session is designed to provide a thought-provoking look at parish and town councils and the roles and responsibilities of being a councillor. The session is fun and interactive, with not a Powerpoint slide in sight! It aims to give councillors improved confidence in engaging in local democracy and highlight areas in which they might wish to learn more. Topics covered include meeting structure and protocol, allocating resources, local council powers and duties, jargon, planning and code of conduct.

Course benefits:

By the end of Core Skills session, you will:

- Understand more about the structure of meetings and the protocols observed by councils
- Understand the role of councillor as 'guardian of the public purse'
- Know the importance of, and difference between, local council powers and duties
- Understand the implications of the council's role as an employer
- Be confident in identifying when the council is best placed to make a decision, and when further research or support from another organisation is needed
- Know more about the role of the councillor as a representative and the two-way communication process between councils and residents

Course leaders:

Jon Brown and Amy Taylor

Price includes refreshments, session notes and a copy of 'The Good Councillor's Guide'.

The Planning Framework

Aims:

This session is designed to give councillors a deeper understanding of the planning system and its context within the national agenda, as well as looking at ways in which the planning system has changed and is set to change and develop in the future.

Recommended for:

Planning Framework is recommended for Councillors on planning committees and councillors who wish to develop their knowledge of planning. Planning Framework training is also suitable for officers who need to understand the Planning Framework.

Session Overview:

The Planning Framework session is designed to give delegates a deeper understanding of the planning system and its context within the National Agenda, as well as looking at ways in which the planning system has changed, and is set to change and develop in the future. Topics include planning at national and local levels, how planning decisions are reached, how to make effective representations, development management, enforcement and penalties and appeals.

Session benefits:

By the end of The Planning Framework Session you will:

- Understand the National and Local Planning Framework, and the implications of Localism
- Be equipped to look at planning applications, knowing the national/local context and be able to frame local council responses using material considerations

Session leaders:

Brian Whiteley & Emma Pearman - Planning Aid.

- The price includes refreshments and session notes.

Basic Planning for Local Councils

Aims:

This session is designed to give delegates an understanding of the statutory frameworks that make up planning law and then looks at responding effectively to applications. Topics include the role of the local council, spatial planning (local plans and neighbourhood plans), managing development (the application process and appeals) and effective input from parish councils (responding to your planning authority).

Session overview:

This session is designed to give delegates an understanding of the statutory frameworks that make up planning law and then looks at responding effectively to applications. Topics include the role of the local council, spatial planning (local plans and neighbourhood plans), managing development (the application process and appeals) and effective input from parish councils (responding to your planning authority).

Session benefits:

- By the end of Basic Planning for Local Councils you will:
- Understand how to improve council working in the areas of planning with reduced financial and reputational risk
- Be able to make more effective planning recommendations made through increased competence and confidence
- Know how to improve relationships with planning officers at planning authority

Session leader:

Simon Catterall

- This price includes refreshments and session notes.

An Introduction to Appraisals

Aims:

This session will enable delegates to use best practice when preparing for and conducting appraisal meetings with employees, and understand where these meetings sit within the wider context of performance management systems

Session overview:

This session will enable delegates to use best practice when preparing for and conducting appraisal meetings with employees, and understand where these meetings sit within the wider context of performance management systems. Councils can achieve the best results from their employees by managing performance within an agreed framework of planned goals, objectives and standards. Councils which have a simple performance management system also have employees who understand the standards required of them, who are able to prioritise their work and know how it fits into the overall aims of the council. Good performance management includes the identification of training needs ensuring that people have the knowledge and skills needed to make the council successful. Topics include how to manage performance through objectives and standard setting and understand how appraisal meetings fit within a performance management system. This session will show you best practice when preparing for and conducting appraisal meetings. Learning is contextualised through the opportunity to practice the skills learned through role play in a safe environment.

Session benefits:

By the end of An Introduction to Appraisals you will:

- Understand where the appraisal interview fits in the context of performance management and the local council framework
- Understand the background knowledge behind the appraisal interview
- Be able to plan an employee's performance
- Understand the performance appraisal process
- Have tools to help you conduct an appraisal interview and manage under performance

Session leader:

Dawn Hamblet

- The price includes refreshments and session notes

Hampshire ALC - AGM

Aims:

Members will have the vote on the direction the organisation will take in the future.

Event overview:

The AGM is an annual event for members and other interested stakeholders. The Hampshire ALC Team will speak about the organisation, present aspects of the annual report and look forward to the coming year. Other guest speakers will also give insight into national and local sector related topics.

Event benefits:

- Members will receive copies of the organisation's accounts and have the opportunity to review the past year and ask any questions.
- As a member-led organisation, members will have the vote on the direction the organisation will take in the future.
- Members will have the opportunity to meet the Hampshire ALC Team that work for them and to network with colleagues.

Event leaders:

The Hampshire ALC Team and guest speakers.

HALC Officer Training and Events Programme - 2019

Officer Development	What You Need To Know (Part 1 of 2)	Eastleigh BC Room 11/12/13	18/06/2019 10.00-12.00	£42.50
Information & Networking Event	Officers Update	Eastleigh BC Room 11/12/13	26/06/2019 10.00-12.30	£45
Officer Development	What You Need To Know (Part 2 of 2)	Eastleigh BC Room 11/12/13	02/07/2019 10.00-12.00	£42.50
Officer Development	Local Council Finance for Officers	The Oakwood Centre	04/07/2019 10.00-15.00	£95
Officer Development	Budgeting & Financial Control	Eastleigh BC Room 11/12/13	19/09/2019 10.00-13.00	£60
Officer Development	Budgeting & Financial Control	Shaw House	22/10/2019 10.00-13.00	£60
Information & Networking Event	Hampshire ALC - AGM	Holiday Inn - Winchester	09/11/2019 09.00-13.00	£0
Officer Development	Local Council Finance for Officers	Winchester Racquets & Fitness Club	12/11/2019 10.00-15.00	£95
Officer Development	Local Council Meetings: Legislation, Guidance and Governance with Practical Tips and Hints on taking Minutes	Eastleigh BC Room 11/12/13	19/11/2019 10.00-12.30	£45
Development for All	Basic Planning for Local Councils	Winchester Racquets & Fitness Club	20/11/2019 18.30-20.30	£45

What you need to know (Part 1)	£42.50	(Booked for 18/06/19)
Officers update	£45.00	(Booked for 26/06/19)
What you need to know (Part 2)	£42.50	(Booked for 02/07/19)
Local council finance for officers	£95.00	
Budget and financial control	£60.00	
HALC (AGM)	£00.00	
Local council meetings, etc.	£45.00	
Basic planning for local councils	£45.00	

TOTAL £375.00

What You Need To Know (Part 1 of 2)

Aims:

This informal two part, small-group course gives new and inexperienced officers an introduction to some of the key aspects of the role, and highlights many support mechanisms and signposts for further information. Just bring yourself and any questions you may already have! Topics include introduction to legislation, things to do before, during and after meetings, sharing initial experiences, problem-solving and trouble shooting, signposts and support and recommended publications.

You must also book Part 2 in conjunction with this event

Session overview:

This session is informal and we welcome delegates to bring their own questions to be answered, in addition to this some of the key topics that will be covered are:

- Setting the context of local councils, both nationally and locally
- The ALC, and where it fits in for councils and officers
- Powers and duties of a local council (defining duties and powers and looking at some of the specific powers in more detail, for example, The Local Government Act 1972, s.137 and the General Power of Competence)
- Meetings and decision-making (thinking about the cycle of meetings, managing their administration with councillors and considering the agenda, meeting and minutes)

Session Leader:

Dawn Hamblet

- The price includes refreshments, session notes and a copy of The Local Council Clerk's Guide by Paul Claden.

Officers Update

Aims:

These sessions are relatively informal and are designed for information sharing and networking

Session overview:

These sessions are relatively informal and are designed for information sharing and networking. Topical subjects are introduced, usually by external expert speakers. Delegates also have time to bring up their own issues and problems and give a forum for discussion, problem-solving and support.

Session benefits:

By the end of the Officers' Update you will have:

- Added knowledge
- New contacts
- Topical updates on 'hot issues'

Session Leaders:

Dawn Hamblet, Jon Brown and guest speakers.

- The price includes hot drinks and session notes.

What You Need To Know (Part 2 of 2)

Aims:

This informal two part, small-group course gives new and inexperienced officers an introduction to some of the key aspects of the role, and highlights many support mechanisms and signposts for further information. Just bring yourself and any questions you may already have! Topics include introduction to legislation, things to do before, during and after meetings, sharing initial experiences, problem-solving and trouble shooting, signposts and support and recommended publications.

This event must be booked in conjunction with What You Need to Know (Part 1)

Session overview:

This session is informal and we welcome delegates to bring their own questions to be answered, in addition to this some of the key topics that will be covered are:

- Setting the context of local councils, both nationally and locally
- The ALC, and where it fits in for councils and officers
- Powers and duties of a local council (defining duties and powers and looking at some of the specific powers in more detail, for example, The Local Government Act 1972, s.137 and the General Power of Competence)
- Meetings and decision-making (thinking about the cycle of meetings, managing their administration with councillors and considering the agenda, meeting and minutes)

Session Leader:

Dawn Hamblet

- This price includes refreshments and session notes.

Local Council Finance for Officers

Aims:

This session is designed to give practitioners a greater understanding of their duties with regard to the council's finances.

Session overview:

This session is designed to give practitioners a greater understanding of their duties with regard to the council's finances. Topics include legislation and the national Governance and Accountability Guidance, banking and accounting, VAT, preparing for end-of year, working with your internal auditor and further support.

Session benefits:

- By the end of Local Council Finance you will:
- Understand the council's and the RFO's duties regarding financial management
- Be aware of relevant legislation and sources of guidance
- Know how VAT law applies to your council
- Understand how the council's accounts are prepared and audited
- Recognise the importance of internal controls

Session leader:

Steve Parkinson.

- The price includes refreshments a light lunch and session notes.

Budgeting & Financial Control

Aims: By the end of Budgeting and Financial Control you will understand how and when to prepare a budget.

Session overview: This session is aimed at those involved in preparing, approving and monitoring budgets, as well as those involved in the day to day financial management of a council.

Topics include:

- setting a budget and precept
- using spreadsheets
- Inflation
- Contingencies and reserves
- how the council tax base affects the budget
- budget monitoring
- Financial management
- Internal control

Session benefits: By the end of this session you will:

- Understand how and when to prepare a budget
- Know how to approve and issue a precept
- Be aware of the factors that affect a budget
- Understand how to manage a budget
- Be aware of the need for internal controls

Course Leader: Steve Parkinson

This price includes refreshments and session notes.

Hampshire ALC - AGM

Aims:

Members will have the vote on the direction the organisation will take in the future.

Event overview:

The AGM is an annual event for members and other interested stakeholders. The Hampshire ALC Team will speak about the organisation, present aspects of the annual report and look forward to the coming year. Other guest speakers will also give insight into national and local sector related topics.

Event benefits:

- Members will receive copies of the organisation's accounts and have the opportunity to review the past year and ask any questions.
- As a member-led organisation, members will have the vote on the direction the organisation will take in the future.
- Members will have the opportunity to meet the Hampshire ALC Team that work for them and to network with colleagues.

Event leaders:

The Hampshire ALC Team and guest speakers.

Local Council Meetings: Legislation, Guidance and Governance with Practical Tips and Hints on taking Minutes

Aims:

To outline the regulation, guidance and practice concerned with Minute taking in the local council sector and to allow the exploration of guidance available, and how councils use it practically.

Session benefits:

To engender confidence in practice, and support the flourishing of professional relationships with councillors

Session Overview:

To outline the legislation, guidance and governance concerned with local council meetings

Provide practical tips and hints on taking Minutes

Session leader:

Vendy Treagust

- This price includes refreshments and session notes.

Basic Planning for Local Councils

Aims:

This session is designed to give delegates an understanding of the statutory frameworks that make up planning law and then looks at responding effectively to applications. Topics include the role of the local council, spatial planning (local plans and neighbourhood plans), managing development (the application process and appeals) and effective input from parish councils (responding to your planning authority).

Session overview:

This session is designed to give delegates an understanding of the statutory frameworks that make up planning law and then looks at responding effectively to applications. Topics include the role of the local council, spatial planning (local plans and neighbourhood plans), managing development (the application process and appeals) and effective input from parish councils (responding to your planning authority).

Session benefits:

- By the end of Basic Planning for Local Councils you will:
- Understand how to improve council working in the areas of planning with reduced financial and reputational risk
- Be able to make more effective planning recommendations made through increased competence and confidence
- Know how to improve relationships with planning officers at planning authority

Session leader:

Simon Catterall

- This price includes refreshments and session notes.