

## Message from the Chair

### Cllr John Hart, Leader Devon County Council



Thank you to all my colleagues in SW Councils for their continued support to me as Chair and to SW Councils as an organisation. 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 in some way from our Core Service provision of HR Advice and Learning and Development support.

I am pleased that the organisation has continued to work hard to keep costs down but that customer service has not suffered. The latest customer survey found 99% of customers agreed SW Councils understood their business and 97% agreed that they were treated as valued customers. Of particular note was that 100% agreed that SW Councils offered good value for money. We have been looking more closely at take up of services this year—many authorities are using the services provided by South West Councils very actively, both the “free to members” services and the discounted charged for services. A real challenge remains communication of the services that can be provided to you and your authorities—if you feel you would like a reminder of what is on offer, or if you want to make suggestions about new services

# South West Councils Annual Report 2014/15

please do get in contact with the team (details at back of report).

In terms of new services the Resources and Management Committee have been encouraging the team to be more innovative, and new services have been introduced recently or re-shaped to meet changing needs. For example many authorities are now making use of the SW Coaching Pool to provide both cost effective coaching and support for their internal coaches, we have introduced a DBS (CRB) online checking services. It was encouraging that in the survey 92% agreed that SW Councils is innovative, up from 46% in the previous survey.

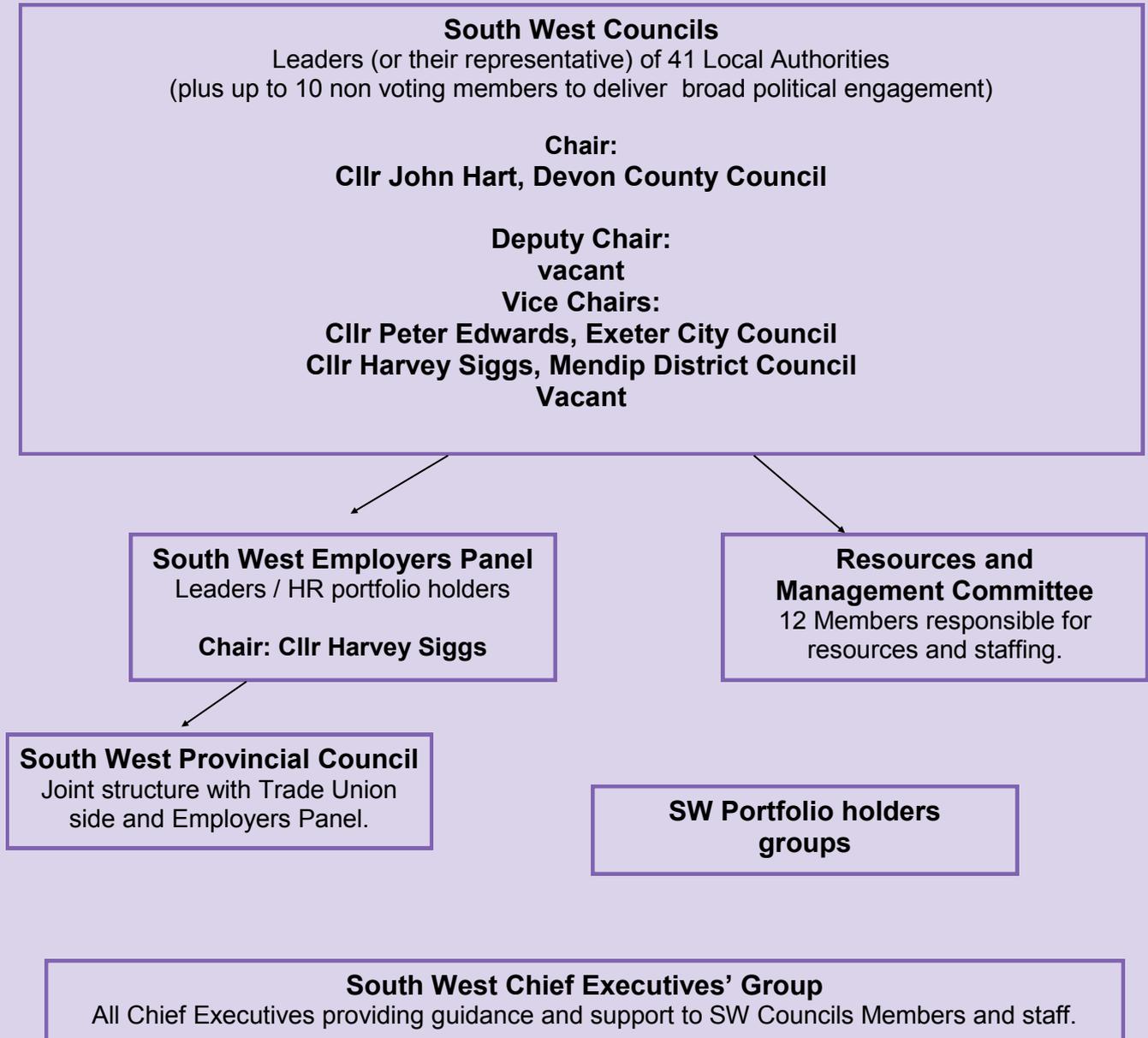
I look forward to continuing to work with colleagues across the South West and further developing our partnership working with the LGA and others.

*“Excellent & professional service every time” “SWC is in tune with the sector”*

*“The service provided by SWC is high quality. The staff are friendly and responsive, they look to support with solutions and they deliver on what they say they will - truly professional.”*

*“SWC give elected members invaluable support they need at times they need it.”*

## South West Councils' Member Structures



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

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 4,500 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 including disciplinary investigations and restructuring
- \* 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; Shared Parental Leave; Trade Union facility time; voluntary redundancy payments update; Living Wage update; probationary periods; HR performance indicators; DBS checks; car parking; overtime and holiday pay etc
- \* 30 authorities have signed up to Epaycheck, the online pay benchmarking system.
- \* 5 organisations using new online DBS checking service

◆  
97 % of customers rated customer services as good or excellent

◆  
46% of local authorities and 16% of associate members received specialised 'not for profit' services

◆  
Assisted with 10% of SW Chief Executives' appraisals

◆  
30 surveys completed

*"It is a pleasure to do business with South West Councils. The meetings are invaluable and the advice received between meetings is of high quality, promptly and reliably delivered. SW Councils fulfil a unique role with their particular expertise in relation to local government and schools terms and conditions and with their links to the LGA and DfE."*

### What our customers said

*"I have sought assistance from South West Councils on numerous occasions relating to employment issues and I always receive professional advice and guidance. I have come to rely on their support for all HR related queries and have complete faith in the team"*

## 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 centre approvals
- \* provided high quality training to 2013 learners (including 197 candidates on qualification programmes)

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

◆  
2 authorities successfully re-assessed for Member Development Charter status

◆  
97% ratings excellent or good on effectiveness of learning

◆  
An increase of 17% on the number of training days delivered

◆  
31 organisations in SW Coaching and Mentoring Pool

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

◆  
£190k saved on coaching interventions and CPD

### What our customers said

*“Best course I’ve attended in 12 years”*

*“Entertaining and pacey! The tutor was quite motivational”*

*“This was an excellent course. The tutors really knew their stuff and took the time and effort to answer my questions”*

*“SW Councils provide some excellent training and development opportunities; they listen to their customers needs, act upon them and are keenly focused on doing a great job”*

## 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

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 Children's Social Care  
Social Worker Recruitment &  
Retention Group

Coaching Champions

#### **Conferences held:**

- Annual Pension Managers' Conference attracting national delegates
- HR Conference (jointly with PPMA)
- Education HR Conference
- Annual Coaching Conference
- Annual PA/Executive Assistance Conference



Press Releases issued on infrastructure investment, Investors In People and International Coaching Week



Joint South West Councils and LGA events : "Future approaches to Devolution", "SW Mediation Conference" & "Councils Innovating to generate Income" (also with Whitehall and Industry Group")



Level of engagement maintained through 34 member and officer meetings and networks



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



Delegate numbers at conferences increased by 8%

### What our customers said

"A must for all LG Pension Managers. Once again, an event that had something for everyone, the must go to event of the year."

"Really enjoyed the day and found topics thought-provoking....Speed Dating with Senior Executives was excellent"  
PA Conference 2014

"action packed agenda, certainly feel like I got great value for money. Terrific personal development"  
Coaching Conference 2014

"excellent topics, very relevant to the current issues that HR advisors in schools are dealing with"  
Education HR Conference 2014

## 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, Quarterly SW Councils Members and Associate newsletter produced

◆  
Twitter followers increased to 550

◆  
87% of survey respondents rated quality and relevance of communications as excellent or good but a recognition of more being needed to make marketing “stand out”

◆  
Budget was delivered within 0.5% with £1.163k income and surplus of £45k generated

◆  
Debt written off below 0.04%

◆  
Compliance requirements met and Certification Officer approval

### What our Members and other customers said:

‘The organisation was first rate, but then again it always is with SW employer events, well done everyone involved’

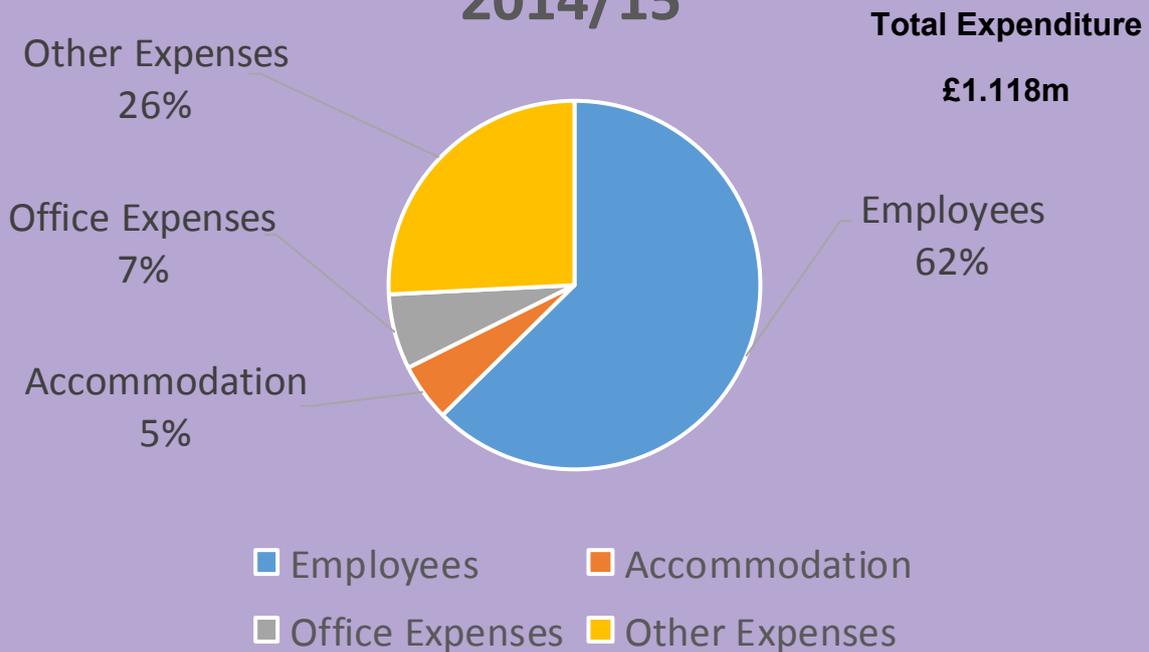
“The financial management of the organisation continues to be strong.”

“A team of great professionals.”

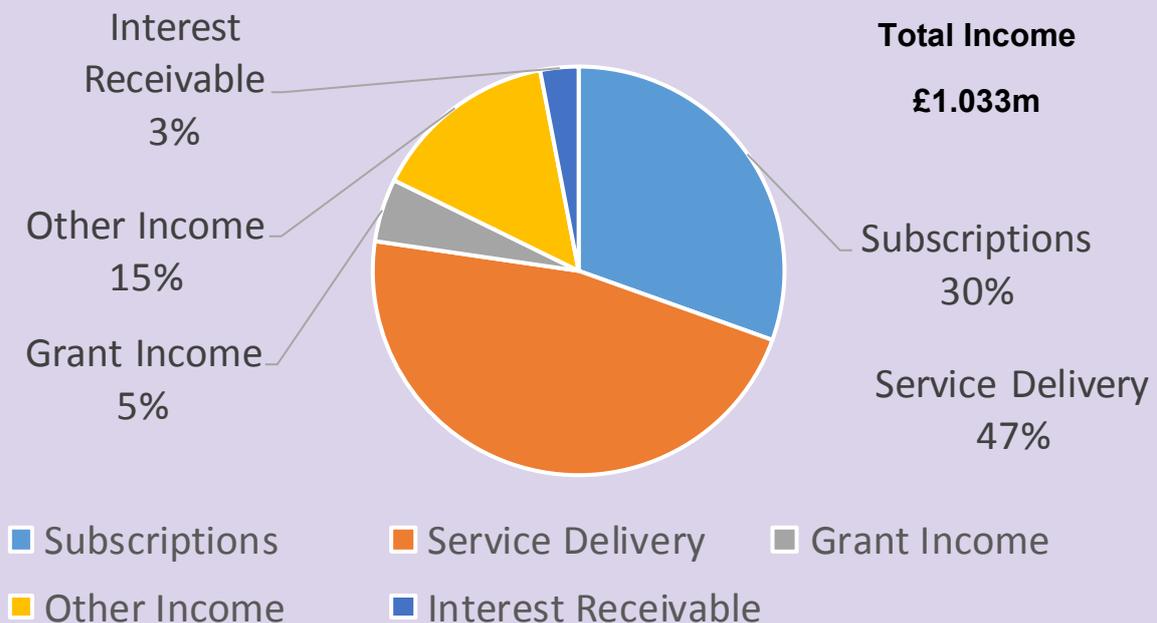
“Consistently of high quality. It is a pleasure to do business with South West Councils”

- SW Mediation Conference

## Expenditure Breakdown for 2014/15



## Income Breakdown for 2014/15



**Phone: 01823 270101**

**[www.swcouncils.gov.uk](http://www.swcouncils.gov.uk)**



**Chief Executive:** Bryony Houlden

**Head of Learning and Development:** Fay Edwards

**Business Manager:** Karen Stone

**Head of HR Services:** Ian Morgan

**Learning & Development Officer:** Sue Crosland

**Principal Officer Finance:** Jill Bowditch (P/T)      **Migration Partnership:** Sarah Short (P/T)

**Regional HR Advisor:** Rachel Grandfield

**Learning & Development and Communications Assistant:** Karen Slade (P/T)

**Admin/Policy Officers:**  
Kelly Anne Phillips (P/T) Pam Robinson (P/T) Wendy Sharland  
**Apprentices:**  
Matt Adams (Business Admin) Lee Boyland (ICT)  
[3 vacancies]

**Principal HR Advisor:** Emily Turner (P/T)  
**HR Support Officer:** Michele Evans