

West Surrey Shadow Authority		
Report title: Member Development Programme Update		
Report to: Standards Committee		
Date: 6 July 2026		
Executive Portfolio Holder: Cllr Victoria Kiehl, Portfolio Holder for Governance, Democracy and Corporate Services		
Report of: Susan Sale, Monitoring Officer (interim)		
Report author(s): Democratic Services sub-workstream, Constitutional & Shadow Authority Workstream		
Wards affected: All		
Ward councillors informed: No		
Exempt from publication: No		
Key Decision: No	If a Key Decision, date registered on Forward Plan: Not applicable	
Report cleared for publication by:		
Workforce & People	Completed by Implementation Team	Not Known
Equalities	Completed by Implementation Team	Not Known
SRO (or their delegate)	Nicola Kilvington	23 June 26
Chief Finance Officer	Vicky Radford	25 June 26
Monitoring Officer	Susan Sale	25 June 26
Executive Portfolio Holder consultation		18 June 26
Chair of Standards Committee consultation		18 June 26
Head of Paid Service	Susan Sale on behalf of Andy Brown	23 June 26

Purpose of the Report:

The purpose of this report is to provide an update to the West Surrey Shadow Authority Standards Committee on member training and development, including:

- 'Phase 1 Induction Training' delivered to date
- Training planned for the remainder of 'Phase 1 Induction Training' of the member development programme (until 31 July 2026); and
- The proposed approach to 'Phase 2 Training' (from 1 September 2026 to 31 March 2027)

Members are asked to note progress to date, endorse the proposals for next steps and provide any feedback.

Recommendations:

It is recommended that the West Surrey Shadow Authority Standards Committee resolves to:

1. Endorse the Member Development Programme Delivery Approach and Principles set out at paragraphs 14 to 22;
2. Note the arrangements for 'Phase 1 Induction Training' of the Member Development Programme, set out in Appendix 2 to this report;
3. Authorise the Monitoring Officer to proceed with arrangements for 'Phase 2' of the Member Development Programme, and provide any feedback on the proposed Phase 2 Training Programme, set out in Appendix 3 to this report; and
4. Agree to receive a report from the Monitoring Officer at the September 2026 meeting of the Standards Committee with a progress update on the Member Development Programme.

Reason for Recommendations:

To ensure that a robust and comprehensive programme of member development activities is in place for the duration of the Shadow Period, supporting members to effectively discharge their responsibilities during this period and ensure they are equipped for their roles post Vesting Day.

Options, including alternatives (if any)

Option 1: Note and endorse the proposals in this report and agree that the Monitoring Officer proceed with arrangements to plan and deliver the Member Development Programme. This option is recommended as it will ensure that members are supported to carry out their roles during the Shadow period effectively and are best placed to take on full responsibilities from Vesting Day.

Option 2: Do not endorse the Member Development Programme proposals, do not agree that the Monitoring Officer should continue to deliver the programme and request that officers reconsider proposals. This option is not recommended as it

creates a risk that members are unable to discharge their statutory and other duties and creates delay.

Summary:

Introduction

1. Elected Members to West Surrey Shadow Authority have a vital role to play, during the Shadow Period, in preparing for Vesting Day and the transfer of full local government powers on that date.
2. The Shadow Period will require Members to act in a range of different capacities and consider and take decisions on a wide range of matters essential to successful implementation planning and transition.
3. The Shadow Authority Member Development Programme (MDP) aims to ensure that members are equipped with the knowledge and skills to both fulfil their role as Shadow Councillors, but also to then take up their duties as ‘full’ unitary authority councillors in April 2027. It recognises that the Shadow Authority Councillors have a mix of local government experience in a variety of previous local authority roles or none at all.

Role of the Standards Committee

4. The Shadow Authority Standards Committee Terms of Reference (section 3-B4 of the Constitution) include that the Committee is responsible for:

“monitoring and reviewing the Member Development Programme, including training on the Members’ Code of Conduct, to ensure it is comprehensive, robust and supports members to deliver their roles.”

Structure of the Programme

5. The MDP has been divided into three distinct phases:
6. **Phase 0: Member induction:** The focus of the member induction phase was on ‘housekeeping’, on ensuring initial statutory requirements were met, and making sure members were well equipped to take part in the inaugural meeting and start work as shadow councillors.
7. A summary of the member induction process is included at **Appendix 1**. This includes a summary of the feedback forms that members were invited to complete after the Induction Day held on 13 May 2026.
8. **Phase 1: Further Induction:** The focus of Phase 1 is ensuring that members have the relevant training they need to:
 - operate effectively as shadow councillors
 - participate in committees that they are members of (including completing mandatory training where required by the Constitution); and
 - understand key aspects of local authority governance and finance, to enable them to participate in decision making and discussions relating to the preparation of the implementation plan and the budget setting process.

9. A summary of the Phase 1 MDP is included at **Appendix 2**. This includes details of training and development sessions undertaken at the time of writing (and member attendance) and sessions that are planned for the remainder of the Phase.
10. The Committee is asked to note the arrangements for Phase 1 of the Member Development Programme. A further update on session attendance will be provided to the September meeting of the Standards Committee.
11. **Phase 2: Deepening knowledge and readiness for post Vesting Day role:** Phase 2, from September 2026 onwards, will incorporate a wide range of development sessions, focusing on the skills and knowledge members need to operate in the latter stages of the Shadow Period and then to work effectively beyond Vesting Day when the authority takes on full local government responsibilities including service delivery.
12. It is during this phase that it is proposed to offer members more detailed 'topic-based' training, as well as ensuring that those members who will have decision making responsibilities for statutory and regulatory services are properly equipped to do so.
13. An outline Phase 2 MDP is included at **Appendix 3**. The details of the phase are still being developed but feedback from Members is welcomed – the Committee is requested to agree that the Monitoring Officer continue work to finalise this phase, and provide any feedback to inform ongoing work. An update on Phase 2 will be provided to the September 2026 meeting of the Standards Committee.

Delivery approach and principles

14. **Training format:** Training will be offered either in person, online or using a hybrid approach. The format selected will depend on the nature of the session content.
 - Skills training may be delivered in person where face to face engagement will assist with skills development (for example the Charing Skills sessions in Phase 1 were delivered in person, due to the fact that formal meetings are held in person).
 - Committee training is being delivered as hybrid, with Committee members encouraged to attend in person (to assist in the establishment of relationships and effective working between committee members and officers), with other members (including those who may act as substitutes) able to attend remotely. Committee training where practical will generally be delivered on the same day as a Committee meeting.
 - Topic specific training to build knowledge will primarily be delivered online, to ensure it is accessible to as many members as possible (see below).
15. **Training timing:** It is planned to deliver training sessions during the working day, avoiding Fridays and school holidays. Given the compressed timeframes set out in the Surrey (Structural Changes) Order 2026, unfortunately it was necessary to deliver some Phase 1 training during the May 2026 half term. Where a particular training session is of paramount importance, consideration

will be given to running a second session during the evening who members unable to attend during the working day.

16. It is recognised that Members will have varying availability to attend training at different times of the day and week according to their personal circumstances. For this reason (and as noted below) every effort will be made to record training sessions. Where Members are unable to attend or access specific training relevant to their roles, alternative arrangements will be made.
17. **Trainers:** Member Development sessions may be delivered 'in house' (for example by Statutory Officers or Officers from the Implementation Team) or by external parties.
18. The trainer will be selected, in consultation with the Monitoring Officer, based on consideration of:
 - the subject matter
 - whether appropriate in-house knowledge and experience exists
 - the capacity of Officers
 - any time constraints
 - any costs associated with external training; and
 - any value that would arise from the session being delivered independently (for example by a Member Peer)
 - any opportunities for training to be shared (for example utilising training being run by a sovereign authority or by East Surrey Shadow Authority).
19. **Accessibility:** Every effort will be made to accommodate any accessibility needs that Officers have been made aware of, including the provision of printed material on request and adjustments for in-person attendance.
20. **Access to training material:** Where possible, material from all training sessions will be made available to members. This will include:
 - circulation of training session slides
 - circulation of recordings of training sessions, where these are available
 - a library of training information available via SharePoint

** Note recordings may not be available for some face to face sessions; and for the discussion or Q&A sections of online training.*
21. **Signposting:** Information about other development opportunities being provided by third parties will be provided to members where these are relevant, for example webinars, e-learning and peer support provided by the Local Government Association (LGA).
22. **Member's personal development needs:** Members may identify that they have specific personal development need in order for them to operate effectively. These needs may vary depending (for example) on any Committees

upon which a Member sits. The Monitoring Officer will consider any requests for individual development activity on a case-by-case basis.

Costs and budget

23. There is no dedicated Member Development Programme budget for 2026/27; however, the Chief Finance Officer has agreed that part of the £900,000 awarded to the Programme by MHCLG in April 2026 should be allocated to “Democratic and Member Enablement”.
24. A small amount of funding (£4,500) was secured from the Programme budget for the Induction Day, covering venue hire, refreshments and other ancillary costs.
25. To date no additional costs have been incurred, with Statutory Officers providing some sessions and the LGA providing training sessions to West Surrey Shadow Authority at no cost. The LGA is also kindly permitting Shadow Authority Councillors to attend various online webinars at no cost, despite the Shadow Authorities not yet being member organisations.
26. Any other costs associated with use of external trainers or venues or member attendance at events will need to be approved by the Chief Finance Officer.
27. An update on any training costs, and information about anticipated member development programme costs for 2027/28, will be provided in future updates to the Standards Committee.

Consultation:

28. Member induction proposals were developed by the Shadow Authority Implementation Programme Workstream, in consultation with the Returning Officer for West Surrey, and the Implementation Planning Board, including the Senior Responsible Officer (SRO) and his Deputy.
29. Phase 1 of the Member Development Programme has been developed in consultation with the Monitoring Officer and the Implementation Programme Board, via the Shadow Authority Workstream, as well as officers with responsibility for Member Development from a number of sovereign authorities.
30. Outline proposals for Phase 2 of the Member Development Programme have been developed in consultation with the Monitoring Officer, Implementation Programme Theme Leads, as well as Officers with responsibility for Member Development from a number of sovereign authorities.
31. Consultation has been undertaken with Cllr Wilson as the Chair (elect) of the West Surrey Shadow Authority Standards Committee who had no comments on the draft of this report.
32. Consultation has been undertaken with Cllr Kiehl as the relevant Portfolio Holder for Governance matters who has commented that the timing of training is an important issue for members and that during the working day is difficult for many. Being mindful of the limited resources of the Shadow Authority, Officers will be able to offer a second session, during the evening, for any training considered to be of critical importance. The Portfolio Holder has also

commented that recording the session may limit participation and engagement, which is understood, but agreed that on balance, recording them is helpful; it should be noted that for all training sessions there is a 'Q&A session' at the end, after the recording has ceased to encourage member participation.

Risk Management and Implications:

33. One of the main benefits of having a robust Member Development Programme is it helps mitigate risk by ensuring Members have the knowledge and skills to discharge their responsibilities effectively.
34. As we continue to develop Phase 2 of the MDP, consultation and engagement with the Standards Committee as well as relevant Officers, will ensure that the programme covers the wide range of topics and skills required to ensure Members can operate effectively in a Shadow capacity, and are best placed to assume full responsibilities at Vesting Day.
35. Financial costs and Officer capacity have been, and will continue to be, considered as the MDP is developed further; but these are not considered to present a substantive risk to delivering an effective Development Programme.

Financial and Value for Money Implications:

36. As noted above there is no dedicated budget for a Member Development Programme in 2026/27; should any funding be required it will need to be approved by the Chief Finance Officer
37. Where possible, external training costs will be kept to a minimum; and other costs (such as member attendance at conferences) will require a clear business justification.

Section 151 Officer Commentary:

38. West Surrey Council will operate in a very challenging financial environment, with significant budgetary pressures and limited financial resources from 2027/28 (Vesting Day), coupled with increasing demand and costs of service delivery, and reducing government funding. The Unitary Council will be increasingly reliant on Council Tax as the primary source of income.
39. Decisions made by the sovereign councils in West Surrey and the West Surrey Shadow Authority will need to consider the ongoing financial impact and ensure that expenditure does not exceed the resources available. It is vital that significant importance is placed on effective financial management and medium-term financial sustainability to protect service delivery and achieve a balanced budget position going forward.
40. Investing in Member Development during the Shadow Period will ensure governance arrangements at West Surrey Council can operate efficiently and effectively from Vesting Day.

Legal Implications (Monitoring Officer Commentary):

41. The West Surrey Shadow Authority Constitution requires that Members may not sit as Members of either the Standards Committee or Audit & Governance

Committee without completing mandatory training. The same provision applies to Members who may wish to sit on these Committees as Substitute Members. Training has been provided in advance of the first substantive meeting of these Committees.

42. All members are also strongly encouraged to attend Code of Conduct Training and one session has been provided, with a further to be arranged. This is important early training to ensure that Members are aware of their obligations in respect of interests and their declarations for the register to ensure they don't inadvertently fall foul of the criminal offence of the Localism Act 2011.
43. A strong Member Development Programme is essential to ensure the conduct of effective and lawful decision making, by well equipped, skilled and knowledgeable members, to ensure a robust governance framework and compliance with the Council's best value duty.

Workforce Implications (Director of Human Resources Commentary)
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44. This commentary is provided by the Surrey County Council Director of People and Change in the capacity of People, Workforce and Culture Workstream Lead.
45. There are no significant workforce implications arising directly from the recommendations in this report. Delivery of the Member Development Programme will require some officer input and capacity from within the implementation programme and, where relevant, sovereign authorities to support the design and delivery of topic-specific training for members. However, this is not considered to give rise to any substantive staffing issues and can be managed within existing arrangements.

Equality and Diversity:

46. The Public Sector Equality Duty is defined in the Equality Act 2010 and requires public bodies to:
 - eliminate discrimination, harassment, victimisation, and any other conduct that is prohibited by or under this Act.
 - advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it; and
 - foster good relations between persons who share a relevant protected characteristic and persons who do not share it.
47. Phase 2 of the MDP proposes training for all members on the Public Sector Equality Duty; in addition specific training will be provided where Committee members need it (for example, Employment Committee members).
48. As set out at paragraph 19 above, the MDP will be designed and delivered in a way that aims to ensure all Councillors have equal access to training and development opportunities.

What Happens Next:

Phase 1 of the MDP will continue to be delivered throughout July 2026.

Subject to agreement by the Standards Committee, work will continue to plan Phase 2 of the MDP, building on the identified delivery approach and principles, and the outline programme included at Appendix 3.

A further report will be brought to the Standards Committee in September 2026.

Report Author: Cath Rose / Anna Miller; Constitution & Shadow Authority Sub-Workstream, People & Governance Theme

Appendices:

- Appendix 1: Member Induction
- Appendix 2: Phase 1: Further Induction
- Appendix 3: Phase 2: Deepening knowledge and readiness for Vesting Day

Sources/background papers:

None

Appendix 1: Member Induction

The focus of the member induction phase was on 'housekeeping', ensuring initial statutory requirements were met, and ensuring that Members were well equipped to take part in the inaugural meeting and start work as Shadow Councillors.

Induction Day:

	West Surrey Member Induction Day
Date	13 May
Format	Face to Face
Location	Camberley Theatre
Invited	90 Councillors
Attended	81 Councillors
Presenters	Internal (Returning Officer, LGR Programme Senior Responsible Officer (SRO), Deputy SROs, Monitoring Officers)
Focus	Introduction to the Council and the LGR programme; Safe and Legal session including information on register of interests; Admin session including personal information forms and photos; ICT session including issue of laptops and email addresses
Cost	£2,898.52 (venue hire, catering & incidentals)

Induction Day Feedback:

	West Surrey Induction Feedback					
Number of forms	60					
Rating / 5 (av)	4.2					
Session ratings (%)	Very good	Good	OK	Poor	Very Poor	Blank
Welcome to the Council	45%	30%	18%	3%	0%	5%
Safe & Legal	58%	30%	8%	0%	0%	5%
Admin	47%	28%	17%	0%	2%	8%
IT	67%	27%	8%	0%	0%	0%
Close	37%	15%	5%	2%	0%	43%

Mop up sessions:

A mop up session was held on the morning of the Inaugural Meeting for those members unable to attend all or part of the main induction day. These sessions were used to issue laptops/emails, take photographs and collect personal and register of interests information. The vast majority of Members who were not able to attend the main induction days were able to attend these mop up sessions.

A very small number of councillors who were not available on either date were offered individual sessions.

All councillors who were unable to attend the main induction days were asked to review a recording and the slide packs from the relevant Welcome and Safe and Legal session.

Metrics:

	West Surrey Induction Metrics
Declarations of office	100% signed in advance of inaugural meeting
Personal information form	98.89% complete
Registers of interests	TBC
Laptops issued	100% issued in advance of inaugural meeting
Email addresses issued	100% issued in advance of inaugural meeting

Appendix 2: Phase 1: Further Induction

The focus of Phase 1 is ensuring that Members have the relevant training they need to:

- operate effectively as shadow councillors
- participate in committees that they are Members of (including completing mandatory training where required by the Constitution); and
- have a solid understanding of key aspects of local authority governance and finance to enable them to participate in decision making and discussions relating to the preparation of the implementation plan and the budget setting process.

Programme

Title	Description	Format	Trainers	Cost	Date & time	Members invited	Delivered?*
What to expect from the inaugural meeting	Session to introduce members to the process, content, and format of the inaugural meeting	Online	Monitoring Officer	None	20 May, 5pm	All councillors	✓
Executive training	Interactive session covering the role of the Executive in the Shadow period and how to operate effectively	Online	LGA	None	27 May, 2pm	Executive members	✓
Employment Committee Training	Session introducing the scope of the Committee and explaining the roles and responsibilities of Committee members.	Hybrid	Monitoring Officer & HR Leads	None	28 May, 10am, Camberley	Employment Committee members (optional for other members)	✓
Member Code of Conduct	Session providing practical information about the Member Code of Conduct, to include Disclosure of Interests and Gifts & Hospitality	Online	Monitoring Officer	None	2 June, 2pm	All councillors	✓

Chairing Skills	Workshop to equip new, and refresh experienced, chairs with the tools and strategies necessary for a smooth running of a meeting, in the context of remote and physical meetings.	In person	LGA + Member Peer	None	11 June, 2pm, Guildford	Chairs and Vice Chairs of Council and all Committees	Deferred due to low attendance
Constitution & Decision Making	Session providing practical information about Council governance and how decisions are made during the Shadow Period	Online	Monitoring Officer	None	16 June, 2pm	All councillors	✓
How Local Government Finance works	Session covering terminology, basic duties/powers, where our money comes from (revenue & capital), where are money is spent (revenue & capital), what's on the balance sheet.	Online	Chief Finance Officer	None	23 June, 2pm	All councillors	
Securing a Foundation Strategic Authority for Surrey	Joint briefing session introducing Foundation Strategic Authorities and anticipated timelines and milestones for an FSA in Surrey	Online	SRO and Programme Director	None	29 June, 4pm	All councillors (East and West)	
Comms & Social Media	A session to provide members with information about communications support and how to effectively and safely engage via traditional and social media	Online	Communications Leads	None	1 July, 4-5:30pm	All councillors	
Audit & Governance Committee Training	Session introducing the scope of the Committee and explaining the roles and responsibilities of Committee members. Mandatory for Committee members and substitutes	Online	LGA	None	2 July, 10am	Audit & Governance Committee Members. Optional for other member including those intending to act as substitutes	

Standards Committee Training	Session introducing the scope of the Committee and explaining the roles and responsibilities of Committee members. Mandatory for Committee members and substitutes	Hybrid	Monitoring Officer	None	6 July, 12 noon, Staines-upon-Thames	Standards Committee Members. Optional for other member including those intending to act as substitutes	
Overview & Scrutiny Committee Training	Session introducing the scope of the Committee and explaining the roles and responsibilities of Committee members.	Hybrid	Centre for Governance & Scrutiny	None	9 July, 10am, Runnymede	Overview & Scrutiny Committee Members. Optional for other member including those intending to act as substitutes	
Financial Governance	Session covering why financial governance is important, the law – powers and duties, roles and responsibilities of key officers and Members, External Audit, Internal Audit, key financial processes (budget setting, monitoring, year-end, key financial decisions	Online	Chief Finance Officer	None	13 July, 1pm	All councillors	
Member-Officer Protocol	Session providing practical information about the Member-Officer Protocol and how to develop positive and constructive working relationships between members and officers	Online	LGA	None	16 July, 4-6pm 2nd session TBC	All councillors	
Woking & Spelthorne Debt	A briefing session specifically focusing on the issue of debt in West Surrey and how the issue will be managed within LGR transition planning	Online	Interim S151, Commissioners	None	TBC	All councillors	

* as of 16 June

Attendance: Attendance records for all sessions are being kept. The table below provides a summary of attendance levels so far.

Title	Committee members	Other members
What to expect from the inaugural meeting	Not applicable	TBC
Executive training	10/10	Not applicable
Employment Committee Training	15	5
Member Code of Conduct	Not applicable	42
Chairing Skills	Deferred due to low attendance*	Not applicable
Constitution & Decision Making	Not applicable	49

* invitation was extended to a total of 12 Chairs and Vice Chairs

Appendix 3: Phase 2 - Deepening knowledge and readiness for Vesting Day

Phase 2 will incorporate a wide range of development sessions, focusing on the skills and knowledge members need to operate in the latter stages of the Shadow period and then to work effectively beyond Vesting Day when the authority takes on full local government responsibilities.

This phase is still in development and the sessions are presented in no particular order. Committee members are invited to review the list of proposed topics below and provide any feedback.

- Repeat of Member Code of Conduct (evening session)
- Repeat of Constitution & Decision Making (evening session)
- Budget setting
- Public Sector Equality Duty
- Safeguarding
- Data Protection
- Online Safety
- Introduction to Fire & Rescue
- Combined Fire & Rescue Service (Governance)
- Emergency Management & Resilience
- Pensions (Governance)
- Being a councillor beyond Vesting Day, and member casework
- Planning Committee Training
- Licensing Committee Training
- Corporate planning & performance management
- Procurement, contract management and social value
- Children's Services*
- Adult's Services*
- Corporate Parenting
- SEND
- Education, schools and libraries*
- Health, including public health, health & wellbeing board
- Highways, transport, road safety & major infrastructure*
- Communities
- Housing
- Homelessness
- Waste collection, recycling & disposal
- Climate change
- Parking & enforcement
- Regulatory services, including trading standards
- Economy, growth & regeneration
- Strategic and local plan making
- Environment, Street Scene, and Open spaces

** more than one session may be required*