

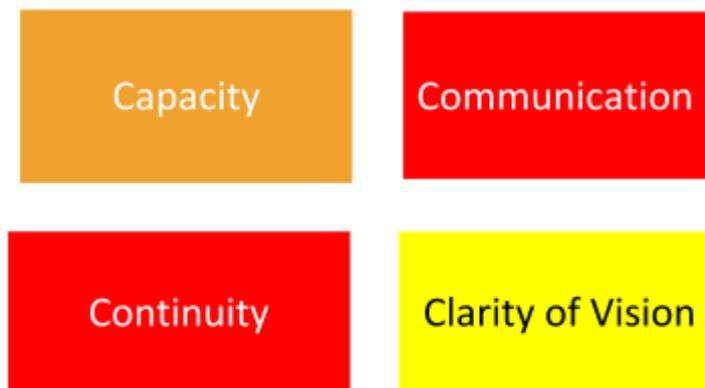
Introduction

ADSO has committed to undertake a full review of its aims and objectives; focusing on vision, strategic objectives, membership offer, influence and operational delivery with a view to agreeing a strategic plan, budget and operational plan for the next three years.

The aim is to strengthen ADSO over the medium term into an organisation that is relevant, fit for purpose and sustainable – delivering an offer of increased value to members increasing partnership working and extending its influence in relevant areas both regionally and nationally.

Progress against the 2018 objectives

The Board away day in June 2018 identified as four areas as priorities for improvement:



Clarity of Vision

ADSO 'does what it says on the tin' – it is a professional membership body with c1000 members, the majority of which are democratic services officers (however the term governance officer is increasingly used within local authorities). However, the name summarises what ADSO is, rather than what ADSO does. Whilst nothing unusual for a membership association, it does not explain the work of the organisation to those external to local government such as the crucial role that democratic services officers play in governance. The vision needs to be quickly articulated in the form of a strapline which refers to the work on governance, e.g. 'championing democracy and good governance' or 'the voice of democracy and governance' or 'driving good governance to uphold democracy'.

ADSO has a vision. It is:

To be a nationally recognised professional association, regarded as such by central government, our members and our partners.'

'To represent, promote and develop excellent democratic services, for the benefit of all those working within the sector and those we support'

Key elements of ADSO's vision were seen to be:

- Supporting & promoting democratic services personnel
- Championing democracy & democratic power

- Being the voice of governance professionals
- Influencing national and local policy
- Driving the direction of the profession

Positive steps since 2018 included:

1. Responding to a number of Government consultation exercises, including the recently published statutory scrutiny guidance.
2. Work with the Councillor Commission.
3. The work done to build the joint taskforce with LLG and the SLCC to push for the recommendations of the Committee on Standards in Public Life work to be implemented, and to improve member misconduct in parish and town councils.
4. The Democracy Hub at the LGA Conference.

This work gave ADSO members a voice and influence on national and local policy.

What does ADSO value?

The values of an organisation shape its culture. Values at the heart of ADSO include integrity, honesty, fairness, trust, inclusivity and respect; working in partnership, openness and transparency, reliability and accountability, professionalism, and innovation. There is no doubt that championing and upholding the principles of democracy runs through ADSO like a stick of rock.

These are strong, credible values for a membership association with a public sector ethos that will resonate with the membership and build that community feel.

Communication

ADSO current communications focus is on the following digital and social channels:

- newsletter (read by 35% of the membership) covers current issues

RECOMMENDATION 1:

The Board reflects upon its vision, mission and objectives to see if they remain fit for purpose. The Board develops a strap line for inclusion with the logo

- website
- members forum
- regional meetings
- Advertising of job vacancies
- Social media around events
- LLG Bulletin

Capacity of Directors to undertake operational work for ADSO has been a naturally limiting factor in the amount of communication to members. Discussions focussed on expanding existing communications to drive up membership engagement– focussing on the brand, the benefits of membership, the voice, and promoting visibility of ADSO’s influence across the sector through involvement with other stakeholders. Increased communication to members could be via blogs,

YouTube videos, and webinars as well as through existing channels. In order to achieve this, additional capacity will need to be created.

Flowing naturally from a clear vision and increased communication is the development of the ADSO voice – the formation of positions which reflect the opinions of the membership, which in turn will generate campaigns.

The ADSO voice

ADSO should channel its vision, mission and objectives, speaking passionately about what it believes to be fundamental on behalf of its members, and what it wants to protect. Directors articulated the messages as:

1. Championing the essential role of the DSO as front-line staff, explaining the often difficult and nuanced job that they do, and clearly articulating what skills a DSO brings to the table
2. Championing democracy, protecting the fundamental principle whilst being flexible about doing it differently
3. Upholding standards and codes of conduct. Training both DSOs and elected members to better engage, and protecting the DSO and those within meetings from bullying and harassment
4. Being experts on constitutional and governance matters, and innovative in its views as to modern delivery of decision making eg. Accessibility via remote access, use of technology to enhance meetings

The Board need to agree key messages and positions on policies, process, and reforms which demonstrate the ADSO voice. Whilst ADSO's voice may be heard, it can be stronger when combined with others. ADSO should continue to identify other stakeholders with common objectives and look to work collaboratively with them to strengthen the voice and the potential to influence. A stakeholder work-plan is drawn up by the board identifying potential stakeholder partnerships, meetings and topics for discussion / opportunities for shared work around the agreed messages.

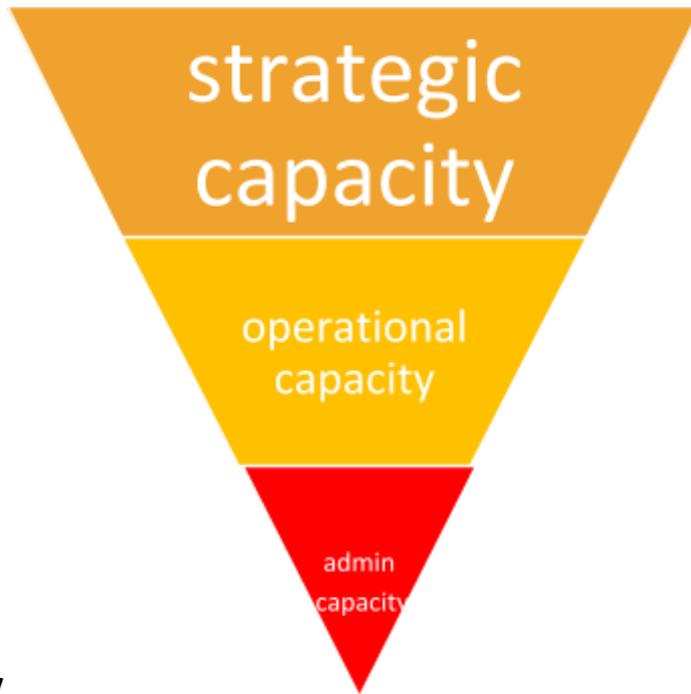
Campaigns

The campaigning voice should be passionate but apolitical – it is about influencing developing policy, working in a political environment whilst retaining political neutrality. The Board needs to spend time at meetings developing and understanding its positions on points of importance if it is to take a strategic approach to engagement. Such positions may include the fundamentals of democracy – ADSO is after all the champion of democracy; the value of a DSO; views on electoral process and procedure; and standards and sanctions.

Developing a voice can galvanise a membership, encouraging members to contribute opinions to the debate. The development of positions provides a good opportunity for member engagement at regional level. The membership voice can be expressed through blogs and on twitter, as well as externally in press releases and consultation responses.

RECOMMENDATION 2

3



Capacity

Capacity is a key issue for ADSO.

During 2018/19, steps had been taken to improve the capacity of the organisation to enable better delivery – additional consultants had been appointed; an external person had been engaged to provide administrative support (with additional capacity if required). A further non-exec director is being proposed to bring different experiences and expertise.

However, despite these steps forward, capacity was still highlighted as a key barrier in enabling ADSO to achieve its ambitions. ADSO is unusual in that it has no directly employed staff, instead purchasing administrative and professional support via other organisations / individuals in order to run successfully. However, this puts a burden on Board members to undertake operational delivery as well as strategic direction, and some board members expressed a view that it was proving difficult to give the amount of time required to do the job properly (considered to be in the region of 1 day per week) in addition to their day job, and consequently they suffered feelings of guilt around delivery being less than ideal.

In effect, there was more to be done in providing more support to maintain current levels of delivery, let alone aspirations of additional delivery.

Could delivery from the membership be an option? The day job of a member is busy and can be all consuming, leaving little time to support the work of the membership organisation. However, some are keen to engage, seeing personal benefits as it will enhance their own career progression. ADSO should articulate the benefits of members supporting the work of ADSO to encourage greater uptake. However, members cannot work alone – it will need operational support.

In summary, ADSO needs to increase its OPERATIONAL CAPACITY to ensure the organisation can deliver increased value to its membership.

Building Operational Capacity

In order to improve ADSOs capacity for delivery, it is necessary to identify firstly what resources are required, and secondly what is affordable in the short, medium and long term. This is not a decision to be made quickly, detailed analysis is required to identify good sustainable solutions. Financially, surpluses were estimated to be in the region of £22k a year, which could be invested in annual provision of operational support. Ideas for improving capacity and improving funding included:

- o Increasing the current administrative support
- o Recruiting / using the services of a part-time business manager, ideally an ex (or current) DSO in order that the board can delegate to somebody
- o Encouraging members to use the 'volunteer days' offered by some local authorities to contribute to the work of ADSO campaigns for the greater good
- o Compensating local authorities to buy time from individuals eg. 10 days a year
- o Reviewing the range of transactional contracts currently by ADSO to see if processes could be streamlined into one single contract to generate a cost saving
- o Stopping the payment to board members in order that the money could be spent on building capacity
- o Increasing consultancy income
- o Using reserves to fund any gap in annual finances during the early years whilst income streams are developed

Discussions were had as to the pros and cons of having employees as opposed to buying services from self-employed staff; or placing contracts elsewhere. However, a fuller picture is required before decisions can be taken.

The Board should complete its business audit to map contracts, costs, capacity required and options for consideration at the next meeting.

Continuity

Succession planning for board members was a key issue in 2018. Again, positive steps had been taken to recruit additional board members, however there were concerns that the biggest hurdle to members wanting to step up to become board members was the time commitment required in a time of austerity and greater workloads. This is exacerbated because the role of the board member is both strategic and operational.

Capacity and continuity are interlinked. We need to make the role of the board member SUSTAINABLE, through focussing the role of the board member on STRATEGIC DECISION MAKING and ENGAGEMENT

RECOMMENDATION 4

THE ROLE OF A BOARD MEMBER NEEDS TO BECOME MORE STRATEGIC RATHER THAN OPERATIONAL. BOARD AGENDAS NEED TO BE STRATEGIC RATHER THAN JUST A REPORTING FUNCTION

Developing the membership offer

DSOs are expected to do more for less. As people with experience leave through retirement or natural wastage, jobs are merged with others, and there are unfilled vacancies into which it is hard to recruit. A trend is the merging of democratic services and electoral services. Workloads can be high. New starters may come with no experience, and see the job as a stepping stone, often only spending 18 months in the job before moving into other areas within the council or externally. Managers overseeing the department often have no direct experience of democratic services themselves. In some cases, the lawyers may be asked to minute planning meetings whilst they are there, which is not good use of the lawyer's time either. The cost of a DSO is not huge for a two-hour meeting.

There is a job for ADSO to do in explaining the value of a democratic services officer. The introduction of technology to record minutes is already impacting on the number of people sent to meetings – however, a recording is not a minute, and there is clear advantage in having the officer present in the room not just for clear minuting the meeting but for advice on process and governance. A machine cannot advise the Chair on a casting vote, or on a wrong decision, or give an instant summary of the discussion/decision. ADSO upholds the fundamentals of democracy and democratic process, and its members need to be at the table for that very reason. The job is so much more than taking minutes.

ADSO needs to form a position on the value of the democratic services officer and why DSOs are crucial to fair decision making.

There is also a role for ADSO to play in looking at how the job can be delivered differently and understanding the broader context. Digitisation should add value, but savings are in paper, not people.

A sensible strategy for ADSO would be to look to induct and create democratic services officers, through induction training, and through developing offerings to university graduates at careers fairs.

ADSO's membership offer has been unchanging over time, with the same number of courses across six agreed themes, all linking to the qualifications. Training has never been a cash cow – providing training was seen an essential delivery of the ADSO membership. However,

it is now losing money in some cases and this trend needs to reverse. Additionally, the creation of apprenticeships may impact on the uptake of the qualification.

What could be done?

Problem		Potential Solution
Members struggling to access training	<ol style="list-style-type: none"> 1. It is difficult for DSOs to take a day out of the office. 2. Cost of travelling increases the real cost of training 3. Austerity hits training budgets and some authorities will only authorise free training 	<p>Webinars can be an option to provide low cost training to members in their lunch hour</p> <p>E-learning could be useful for longer, regularly repeated training sessions</p> <p>Youtube could be great for taster videos, eg. 2 minutes on 'what is local democracy?'</p>
Charging models need revisiting	<ol style="list-style-type: none"> 1. How can courses be provided cheaply or in some cases, for free? 2. What charging models are competitors using? 	<p>Looking at cheaper methods of delivering peer to peer learning may increase uptake</p> <p>Further development of in-house training may lower overheads and allow the training to be rolled out multiple times</p>
Creation of new courses is time consuming and difficult	<ol style="list-style-type: none"> 1. New themes for training may be beneficial 	<p>An expansion of the qualification may also encourage those with qualifications to do an extra module.</p>

Membership discounts have been tried as a boost to the membership offer in the past with some success.

Free financial management has been on offer from St James Place but the take-up has been limited.

The members forum continues to be popular and well used and allows real time networking and peer to peer support.

The advertising of job vacancies is both a key benefit and a good source of income.

Whilst the membership offer can be improved through expansion of the training programme, a bigger benefit comes with the clear communication of what the membership offer includes. The members need to be sold the identity of ADSO – the qualifications, the knowledge exchange, the personal development, the voice, the education, the networking, the values, and the community.

BRANCH ENGAGEMENT

Engagement at branch level is beneficial to members – offering opportunities for networking, personal development and problem solving. So why aren't more members choosing to engage?

Member views

The most recent survey was carried out by the London branch. Over half the membership had been members for in excess of 6 years, demonstrating good retention of members. 80% have attended a branch meeting, showing a good level of engagement. When asked why they didn't always attend, the biggest reason was 'other commitments' - increasing workloads and the busy lives of members impacts on their ability to attend regardless of venue or agenda.

Of interest is peer to peer learning – interests and presentations from other councils with respect to projects they have carried out, or issues they have dealt with in their areas.

Responses also detailed options for future courses and training that could be delivered by ADSO.

Possible strategies

A top down approach to encouraging engagement is beneficial – if the Head of Democratic Services or the Director encourages staff to engage, they are more likely to do so knowing that they have the backing of the organisation.

Linking branch meetings to learning and development events or conferences can boost attendance.

Regular activity and momentum are key, coupled with relevance of discussions and value to the individual personally in their own development as well as professionally. No-one wants to be a member of a sleeping branch; or see uninspiring agendas.

RECOMMENDATION 5

ADD VALUE TO THE MEMBERSHIP OFFER BY CHAMPIONING THE DSO, COMMUNCIATING CLEARLY THE OFFER, MODERNISING THE TRAINING TO INCLUDE MULTIPLE CHANNELS, REINVIGORATING BRANCH MEETINGS, AND DEVELOPING THE OFFER TO SUIT CHANGING ENVIRONMENT

Branches should also consider using technology to boost engagement in ways other than physical attendance – email groups or whatsapp groups can be useful

Barriers to progress:

Even with the best of plans, there can be hurdles to delivery. Current hurdles include:

- The board is operational, not strategic
- The day job limits Director's ability to deliver against ADSOs objectives
- With so much to do, it can be hard for the board to prioritise
- Board and member communication needs improving
- The board needs to challenge more

These hurdles can be overcome. The first step is a more strategic board agenda for the meeting on July 12th, that considers the recommendations within this document, makes progress against them, and then sets priorities for next steps. Short term capacity for support is available. I am retained to undertake a full strategic review so the board has the opportunity to move things forward. Next steps include:

- Undertaking a business audit of existing contracts, operational delivery requirements and funding options
- Carrying out a survey of the members as to what they would like to see ADSO deliver as services, and campaign on
- Designing messages and discussions for regional meetings

The Board should consider redesigning its agenda and decision making to allow sufficient focus on strategic decision making and better balance with the time spent on board members reports.

Questions for the members

Consulting the members would be very sensible in the next stage of the strategic review process. Question proposed on the away day to be further developed included:

- What do members value the most / the least?
- What does ADSO do well / could do better?
- How do they see the world changing?
- How should that influence ADSO?
- What is their preferred method of communication?
- What is their local authority policy on training?
- Would they like multiple methods of training, eg. face to face, webinars, e-learning?
- Which of our ideas should we prioritise?

Member feedback is essential if the strategy is to succeed.

Conclusion

ADSO is in a financially strong and stable position, with low cost membership that provides good value for money, allowing it to both attract new and keep existing members. Its status as a professional membership body gives ADSO legitimacy in debate. The Board has a good mix of skills and has attracted new members recently, however the workload of Directors continues to be operationally onerous, beyond what many could commit to deliver, which will impact on both recruitment and retention of board members, and the ability of ADSO to improve its services.

ADSO is at a crossroads – if it wants to modernise and improve and change the pace of delivery it will need to increase its capacity to deliver.

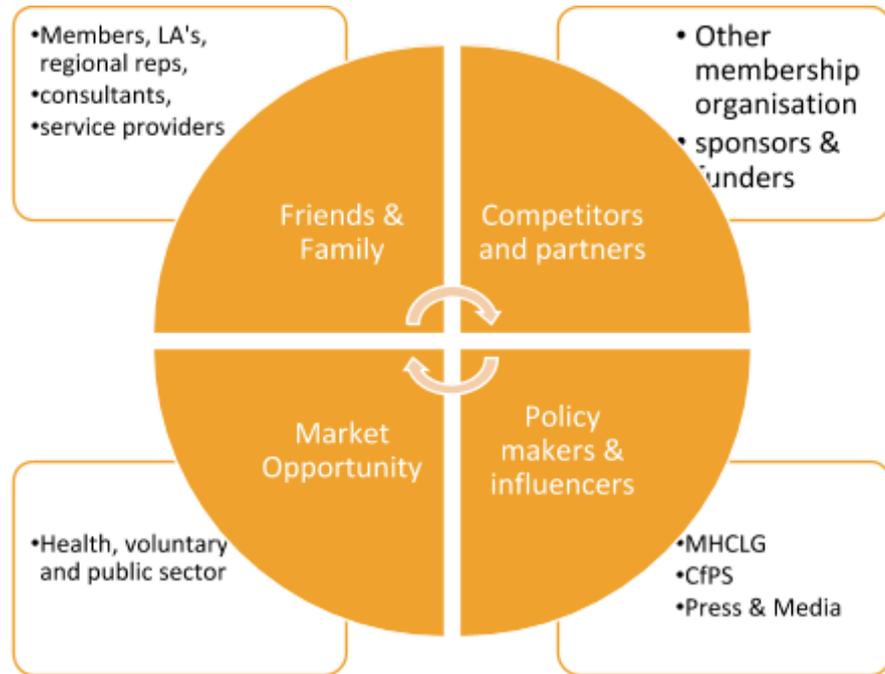
Summary of Recommendations		
1. CLARIFY the PURPOSE	A) The Board reflects upon its vision, mission and objectives to see if they remain fit for purpose.	1) The Board looks to clearly communicate its expertise in governance and its importance in upholding democracy within local authorities. 2) The board develops a strap-line for inclusion with the logo
2. Develop the ADSO Voice & Influence	A) Decide what ADSO wants to say B) Identify stakeholders with common objectives to work collaboratively with to strengthen the voice and the potential to influence. C) Look to become a 'go-to' organisation to the government.	1) Debate, consult and agree key messages 2) Draw up a stakeholder work-plan identifying potential stakeholder partnerships, meetings and topics for discussion. 3) Actively start to engage with MHCLG in writing on a regular basis to raise profile
3. Increase OPERATIONAL CAPACITY	A) Increase capacity to ensure the organisation can deliver increased value to its membership.	1) Undertake a full business audit to map contracts, costs, capacity required 2) Develop options for consideration at the next board meeting. 3) Boost operational capacity at administrative and managerial level to give board members the opportunity to delegate
4. More STRATEGIC FOCUS at Board meetings	A) Focus the role of the board member on STRATEGIC DECISION MAKING and ENGAGEMENT	1) Review the Board agenda to allow time for strategic decision making and discussion.

<p>5. Increase the value of the MEMBERSHIP OFFER and improve MEMBER ENGAGEMENT</p>	<p>A) MODERNISE the MEMBERSHIP OFFER through a wider communications strategy with increased opportunities to engage on multiple platforms</p> <p>B) Revitalise BRANCH MEETINGS</p>	<p>2) Redesign the role of the board member to be more strategic, less operational and sustainable to improve succession planning</p> <p>1) Understand both who the members are currently and the potential membership markets</p> <p>2) Survey the members to find out what they think, want and need</p> <p>3) Involve the regions in developing the member voice</p> <p>4) Use social media at branch level</p> <p>5) Champion the DSO</p> <p>6) Modernise the delivery of training and expand the program</p>

This will give us the bare bones of a strategic plan that we can then discuss with members through a survey, or in regional focus groups.

Appendix 1:

Stakeholder Mapping



Appendix 2

SWOT analysis



strengths

- the organisation is respected, committed, driven, and open
- diverse membership
- strong membership numbers and a supportive membership
- forward thinking, offering professional qualifications
- wide sector knowledge
- strong finances



weaknesses

- insufficient operational capacity
- insufficient influence
- not enough comms and social media
- board more operational than strategic



opportunities

- potential members in other markets or sectors
- collaborative working
- social media and you tube
- consultancy
- exchange opportunities between councils
- sharing management experience and knowledge



threats

- reducing membership numbers
- faling income
- DSO work diluted with other work
- succession planning
- local authority austerity cuts