

LGA corporate peer challenge

An introduction to the peer
challenge process and role
of peers

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Introduction and purpose

Introduction

Thank you for volunteering to be a peer and play a role in supporting local government improvement as part of the Local Government Association (LGA) Peer Challenge Programme. Peer challenge is an important part of the support offered to help councils strengthen local accountability and improve services.

www.local.gov.uk/sector-led-improvement

Peers are at the heart of peer challenges which are managed and delivered by the sector for the sector. Peers provide a practitioner perspective and critical friend challenge. Working as a team managed by an experienced LGA peer challenge manager, peers spend time onsite at a council to help it with its improvement and learning.

www.local.gov.uk/peer-challenge

Peers help build capacity, confidence and sustainability in local government by sharing knowledge and experience, and enable the transfer of learning across the sector. They help councils to reflect on current processes and practice. They champion change and improvement through their own actions and by recognising and celebrating excellence in others.

Purpose of this document

This document is designed to introduce you to the role of a peer and ensure you are ready and confident to be part of a peer challenge team by:

- providing an overview of the role of peers in delivering corporate peer challenge as part of the LGA support offer to sector-led improvement
- raising awareness and understanding of the expectations and responsibilities of being a peer.

The emphasis of the Peer Training Event is on learning and development. Further guidance and a briefing will be provided by the LGA peer challenge manager ahead of any peer challenge you participate in.

Peer challenge: a brief history and the current offer to the sector

A brief history of peer challenge

Peer challenge emerged as a response to a desire within local government for councils to be able to informally test their effectiveness and learn from others. It has traditionally been applied on a corporate basis, although over the years many service-based and thematic models have emerged (eg planning, children's, adults, and diversity).

Peer challenge is a 'tried, tested and trusted' way of supporting local government improvement. The LGA manages the delivery of more than 120 peer challenges a year

Whilst distinct from formal inspection, peer review/challenge has in the past been used in preparation for it. Current focus is on sector-led improvement so there is a need to ensure the peer-led approach looks and feels different to inspection.

The current corporate peer challenge offer

Peer challenge is one of several tools made available by the LGA to support sector-led improvement.

Key principles and design features

The LGA offers all councils (and fire and rescue services) a corporate peer challenge every 4-5 years on a fully subsidised basis. The key design features and principles of the offer are:

- The peer challenge can be delivered at a time of an authority's choosing – recognising that there are different drivers, challenges and considerations in different places.
- The challenge is proportionate and flexible. The focus of the challenge (within, or in addition to, the core components) is agreed with each individual council to reflect their local needs and requirements.
- Peers are at the heart of the process. They spend time onsite at a council to help it with its improvement and learning by providing a practitioner perspective and critical friend challenge.

The peer challenge will focus on areas that provide reassurance about performance and the ability and capacity to deliver on future proposals and ambitions, as well as other areas agreed with the authority receiving the challenge.

The five high-level questions (the core components) considered by all corporate peer challenges are:

1. **Understanding of the local place and priority setting:** Does the council understand its local context and place and use that to inform a clear vision and set of priorities?
2. **Leadership of Place:** Does the council provide effective leadership of place through its elected members, officers and constructive relationships and partnerships with external stakeholders?
3. **Organisational leadership and governance:** Is there effective political and managerial leadership supported by good governance and decision-making arrangements that respond to key challenges and enable change and transformation to be implemented?
4. **Financial planning and viability:** Does the council have a financial plan in place to ensure long term viability and is there evidence that it is being implemented successfully?
5. **Capacity to deliver:** Is organisational capacity aligned with priorities and does the council influence, enable and leverage external capacity to focus on agreed outcomes?

The purpose of the peer challenge should be to inform further improvement and learning. It is designed to be forward looking, facilitative and problem solving. Whilst it can be used to provide an external 'health-check', the peer challenge will not deliver a detailed diagnosis or scored assessment. As such, there is a strong emphasis on peers providing practical advice and suggestions.

How authorities are using their peer challenge

Authorities are using their peer challenge to focus on a variety of different issues, including:

- providing an external perspective of major change and transformation programmes – to inform and challenge options for the future
- to explore and test thinking on new ways of working, service delivery and relationships with citizens and or partners
- to provide feedback and observations on the realism, robustness and relevance of plans to support key priorities such as economic growth
- to inform the corporate strategy, comment on the council's readiness for the future, and its current trajectory and rate of change
- to provide feedback on how the council is working with partners, and harnessing internal capacity and leadership, to deliver priorities
- to provide external perspective, observation and critical friend challenge on the financial strategy
- helping to assess the impact of joint working between two councils in terms of improved service delivery and efficiency gains.

For more information about the offer see the peer challenge at:
www.local.gov.uk/peer-challenge

The peer challenge process and the role of peers

Scoping the peer challenge

Following the request for a peer challenge, a scoping meeting between the LGA Principal Adviser and the host authority (normally with the chief executive and leader) will occur. The purpose of this meeting is to discuss and agree the:

- scope and timing of the peer challenge
- make up of the peer team
- methodology and approach to stakeholder engagement
- background information required
- practical arrangements and preparation
- communications pre and post challenge.

Assembling the peer challenge team

The peer challenge team will then be recruited. The make-up of a team will reflect the requirements and the context of the council receiving the peer challenge – as discussed at the scoping meeting. Peers will be recruited to the peer team from our database of peers on the basis of their expertise, knowledge and experience. The information you provided via your CV or Expression of Interest Form will be used to inform our search for peers and help determine the people we suggest to the authority.

You will be contacted by either the LGA Peer Challenge Manager or one of our peer placement coordinators. If you are a member peer you will be contacted by a representative of your relevant political group office. They will check your interest in, and availability for, the peer challenge. You will be given as much notice as possible (typically we suggest to authorities that the scoping meeting occur four to six months prior to the peer challenge). We will then put you forward as part of a suggested peer team.

The role of peers

Once you have been confirmed on a peer challenge team, there are three main phases of activity involving peers:

- pre-onsite preparations
- onsite at the council
- post-onsite.

A **Peer Role Description** for all peers on a peer challenge sets out key roles and responsibilities throughout the process. This can be found at Appendix 1.

You will receive a comprehensive briefing from the Peer Challenge Manager and receive a 'Peer Team Briefing Note' ahead of any peer challenge you are to be involved in.

In addition to the activity listed above, there is an offer of a follow up visit to the authority 1-2 years after the peer challenge. This normally includes some or all of the original peer team.

Pre-onsite preparations:

- Peers will need to read some background information in advance of the peer challenge. A set of documentation will be sent to you approximately 2-3 weeks in advance of the team being onsite at the authority. The information is likely to include a short 'position statement' prepared by the authority. This will serve as a brief and terms of reference for the team. You will also receive other information relevant to the chosen areas of focus and the core components.
- Peers should familiarise themselves with the authority and the specific issues they have asked us to look at. In doing so, peers should think about their own experiences and examples and bring these along ready to use them (if appropriate). Peers should be prepared to network with others from the sector with similar professional backgrounds to bring in further learning to the peer team.
- There will be a teleconference 1-2 weeks before the team going on-site. This is an opportunity to share initial perceptions from the background information and consider the timetable for the on-site visit.
- Peers are required to attend and participate in the peer team meeting the evening before the onsite visit. This provides an opportunity to meet the rest of the peer team, share initial impressions and views from the pre-reading, and do some final preparation.

Onsite at the council:

- The peer team meets with a wide range of people including officers, councillors and others connected with the authority. A timetable of activity is organised in advance by the council to enable this. The process is a dynamic one and requires a high degree of flexibility throughout. Meetings are an opportunity to explore issues and ideas with a range of stakeholders not just about evidence gathering. Peers should stimulate discussion within the council about how it might accelerate the achievement of its ambitions.
- The peer team will normally split into pairs to facilitate the meetings/discussion sessions so there can be two or more streams of activity running at the same time. The peer team will collate, analyse and triangulate the key messages from these meetings which will then be used to develop and deliver feedback to the council.
- You will be required to keep a record of the discussions you are involved in. Post-it notes will normally be used to record and summarise messages under key headings. Notes will need to be stored and managed appropriately (in line with the guidance on data management) until the feedback report is finalised and signed off by the authority.
- The onsite phase will finish with a feedback session. This often takes the form of an informal round-table meeting where key findings are discussed with senior people from the council. The peer team's feedback is presented by the peer team leader (chief executive) with agreed input from other peers in the team. The audiences for the feedback session vary – some authorities invite everyone who has participated in the process, whilst others choose a smaller audience such as the senior management team and cabinet.

Post-onsite:

- A draft feedback report will be prepared by the LGA peer challenge manager on behalf of the peer team. Peers will be asked to comment on the draft before it is sent to the authority. Where possible we try to include signposting to examples of practice, people and places that might help a authority develop its thinking further. Peers can add value to the feedback letter by providing notable and other practice examples.

Follow up visit:

- The Corporate Peer Challenge offer includes a follow up visit 1-2 years after the original visit. The purpose of the visit is to help the authority demonstrate impact and progress. Some of the peer team will be invited to participate in the visit.

Peer challenge ground rules

The following 'ground rules' help ensure we are clear about what is expected while carrying out a peer challenge. Peers are asked to adhere to and advocate these as they participate in the peer challenge process.

1. Prioritise a positive and supportive

experience for the council: peer challenge is a people focussed process. It is vital that people the team come into contact with sees us as friendly and courteous and as having listened. The questions posed by the team may be challenging at times, but it is important to ensure people we meet do not feel this challenge is directed against them personally. The impression the team makes is very important. This will make a difference to how they receive and respond to the team's feedback. The purpose of the peer challenge is to inform and support further improvement and learning. It is not a form of inspection. Peers are there at the invitation of the council.

2. Valuing each other's input: people on the team come from different walks of life and professional backgrounds, and will have been recruited to the team by virtue of the different views, perspectives and knowledge they have to offer. It is important to respect and value these. Assimilating the views of several people into a feedback presentation at the end of the process can be challenging in the tight timescale available. Achieving it will require everybody to listen and engage in constructive debate, to be prepared to challenge and be challenged and to feel they can be open.

3. Confidentiality: it is vital for our credibility to establish a climate of trust in which people feel they can be open and honest. One of the key motivations for being a peer is the opportunity to learn from others. People are encouraged to return to their own organisation at the end of the process and talk about their experiences. But in doing so, we need to respect that some of the information we come across may be sensitive and confidential in nature and, with the world of local government being a small one, it is important that it is not used in any way that may undermine the council or integrity of the peer challenge process.

Support and development for peers

We value the important and vital contribution peers make to sector-led improvement. Peers volunteer their time to provide a 'practitioner perspective' and 'critical friend' challenge to help organisations and their people learn and improve.

To help maximise this experience, we have set out in a '**Peer Charter**' some of the expectations and requirements of being a peer. The charter is attached at 'Appendix Two'. The charter summarises some of the key contractual obligations contained in the **Peer Terms and Conditions** which we ask you to familiarise yourself with. These can be found on our page 'Information for Peers': http://www.local.gov.uk/support1/-/journal_content/56/10180/7846570?_56_INSTANCE_0000_templateId=ARTICLE

Our relationship with you

As a peer you are not an employee of the Local Government Association (LGA). If you are an officer peer you will continue to be employed by your existing employer. You will continue to work under the terms and conditions of your existing contract of employment and will continue to be paid by your existing employer. If you are a member peer you are entitled to our member peer allowance in addition to the reimbursement of travel and subsistence costs offered to all peers.

The benefits and value of being a peer

People who have been peers suggest the benefits are wide, varied and sometimes personal. Peers provide positive feedback on the benefits and value of being involved in peer challenge. These include:

- a recognised and valued way of making an active contribution to sector led improvement
- an opportunity to see and experience other places providing personal learning and transferable practice
- opportunities to build networks, relationships and collaboration with others
- sharing of learning and practice through peers, and across authorities and the sector.

The practical stuff

Once confirmed as a member of a peer challenge team, you will receive an email setting out the practical details and arrangements for the peer challenge, including:

- details of the peer team make-up (ie who else is on it)
- contact details of the peer challenge manager
- hotel confirmation and travel information.

You will be issued with a purchase order. This will provide a project code and an expenses form template which you can use to claim back your travel expenses.

Further information about peer challenge

Further information

For further information about the peer challenge offer and the role of peers please visit our website at:
www.local.gov.uk/peer-challenge

Here you will find information about the offer, including what authorities and peers are saying about peer challenge.

You can also contact:

Paul Clarke

National Programme Manager (Peer Challenge)
Local Government Association
Phone: 07887 706960
Email: paul.clarke2@local.gov.uk

Thank you for putting yourself forward to play a part in supporting and enabling sector-led improvement

Appendix one: Peer role description

Officer and member peers as part of peer challenge teams

Peer challenges are managed and delivered by the sector for the sector. Peers are at the heart of the peer challenge process. They provide a practitioner perspective and ‘critical friend’ challenge. Working as a team, and supported by an experienced LGA peer challenge manager, peers will spend time onsite at an authority to help it with its improvement and learning.

Peers help build capacity, confidence and sustainability in local government by sharing knowledge and experience, and enable the transfer of learning across the sector. They challenge inappropriate processes and behaviour, and champion change and improvement both through their own actions and by recognising and celebrating excellence in others.

Peer challenge teams will be recruited from our pool of peers. The make-up of a team will reflect the requirements and the context of the authority receiving the peer challenge. Peers will be recruited to a peer challenge team on the basis of their expertise, knowledge and experience.

Peer role and responsibilities

Peers on a peer challenge team are expected to:

1. Undertake pre-reading in advance of the peer challenge: peers will be sent a small amount of information and documentation that they will need to read before meeting up with the peer team the evening before the peer challenge.
2. Attend and participate in a telephone conference and an initial peer team meeting: peers will need to be in a position to share their initial impressions and views from the pre-reading, and prepare for the onsite phase of the process.
3. Facilitate interviews and discussion whilst onsite at the authority: a timetable of activity will be arranged in advance, including meetings, focus groups and site visits. Peers are expected to gather information via these, record and share key findings with the peer team. Peers will need to facilitate discussions with officers, members and other stakeholders to prompt new ideas and potential solutions.
4. Draw on their relevant skills, knowledge and experience: peers are expected to demonstrate specific know-how and share examples of best practice from their own experience to provide insights into how the council is performing and how it might accelerate the achievement of its ambitions.

5. Analyse key messages throughout the process: peers need to recognise and incorporate different stakeholders' perspectives, gather, analyse and communicate information in order to suggest realistic and credible solutions to challenges.
6. Work with others in the peer team to develop and deliver a feedback presentation: the presentation will normally be led by the peer team leader (chief executive or lead professional) with input from other peers in the team.
7. Contribute to the draft feedback report within agreed timescales: peers will be asked to comment on the draft developed by the peer challenge manager on behalf of the team.
8. Undertake additional or specialist roles on the peer team: some peers will be recruited to the team to undertake a specialist or additional roles – such as peer team leader, or an expert adviser role.

Peer competencies

In carrying out the roles and responsibilities listed above, peers are expected to display the following competencies and behaviours:

- **Developing others** by sharing learning and providing a supportive and non-judgmental environment, and demonstrating a personal commitment to continual development and learning.
- **Work effectively with others** in the peer team to achieve a common purpose through valuing the contributions of others and recognising and including diverse viewpoints.
- **Providing challenge** by being able to positively and constructively challenge individuals and groups in an effort to help them to improve. Peers should be able to perform the role of a 'change agent' sensitively and inclusively.

Planning and communicating effectively by analysing requirements and coordinating activity and priorities and providing evidence to support ideas.

- **Political and organisational awareness** by understanding the local context and overcoming political and organisational differences to work collaboratively with different stakeholder groups.

Appendix two: Peer Charter

We value the important and vital contribution peers make to sector-led improvement. Peers volunteer their time to provide a 'practitioner perspective' and 'critical friend' challenge to help organisations and their people learn and improve. To help maximise this experience, this charter clarifies some of the key expectations and requirements of being a peer. It summarises:

- our relationship with you
- what we expect and require of you in your role as a peer
- what you can expect from us to support you as a peer.

Our relationship with you

As a peer you are not an employee of the Local Government Association (LGA). If you are an officer of a local authority then you will continue to be engaged under the terms and conditions of your existing contract of employment and you will continue to be paid by your existing employer.

The organisations we work with specify the skills, expertise and experience of peers they require. The peers we suggest to them will reflect these requirements. We cannot therefore guarantee that any, or any amount of, services will be sought from you as a peer. We regularly review our pool of peers to ensure we can offer peers with the experience and expertise required by the organisations/local authorities we work with.

What we ask of you

You will:

1. As an officer peer seek permission from your employing organisation/local authority for you to be released as a peer to volunteer your time. This will indicate to us that your employer has agreed for you to be released and will continue to cover your salary (including any tax, national insurance and pension costs) for the period of the peer project.
2. Display and advocate the peer competencies and behaviours and perform your role and responsibilities in accordance to the relevant peer role description. As a peer you will carry out your role and responsibilities with the highest level of skill, care and diligence.
3. Inform us of any changes in your circumstances including role and employment status so that we can update the information we hold on you to help ensure it remains accurate and up to date.
4. Respond promptly to confirm your interest and availability when we contact you about a potential peer project. This allows us to respond quickly to the requests and requirements of local authorities and the other organisations we work with. We ask that you advise us of any political activity or other issue that may cause a conflict of interest with your involvement with the peer project.

5. Commit to a peer project by taking reasonable action to ensure you can remain available for the duration of the peer project assignment. We understand that on occasion there will be unforeseen circumstances and legitimate reasons for having to withdraw from a peer project. When this happens we ask that you provide us with as much notice as possible. This provides us with the opportunity to identify a replacement peer.
6. Respect the confidentiality and sensitivity of the information that you come across during the course of a peer project. We also ask that you check with the LGA project manager before you publicly disclose the peer projects you are involved or have been involved in.
7. Act as a champion for sector-led improvement by positively advocating and promoting the role of peers. We ask that peers be willing to provide feedback following a peer project to summarise their experience. From time to time we will ask some peers to be involved in peer development sessions to promote the role of peers.
8. Self-assess your performance after each peer project you undertake as part of our evaluation of our peer led support to the sector.
3. Provide you with a purchase order, guidance on any expenses and relevant and appropriate guidance that specifies key dates, your fees (if any) and deliverables required, prior to each peer project.
4. Cover all reasonable out of pocket expenses such as travel, food and drink and hotel accommodation which have been approved by the LGA project manager, provided these are submitted promptly and supported by relevant receipts and are in accordance with our Expenses Policy.
5. Provide peers with Professional Liability Insurance Cover. On occasions we may require peers to arrange their own public liability insurance. We will advise peers if this is required.
6. Provide as much notice as possible on the limited occasions that peer projects are cancelled or postponed. If we have to cancel a peer project and your involvement in it, we will do so without any liability to peers for any compensation or payments.
7. Adhere to our obligations under the Data Protection Act 1998 when managing the information we hold on our peer database. We will use the information we hold on your knowledge, expertise and experience to match you with potential peer projects. We may also share your information with other organisations such as local authorities, fire and rescue services and other partner organisations we work with for these purposes.
8. Feedback on your experience after each peer project you undertake as part of our evaluation of our peer led support to the sector.

What you can expect from us

We will:

1. Ensure that you are offered relevant and proportionate training, development or briefing activity to enable you to undertake your role as a peer effectively.
 2. Provide as much notice as possible of potential peer projects to maximise the chance of you being available. We will always check your availability and willingness to do the peer project before we pass your details onto the organisation we are working with.
- Please familiarise yourself with the Peer Support Terms and Conditions¹. These detail the contractual obligations of peers. They include the terms and conditions we expect peers to work in accordance with when working on a peer project.

¹ http://www.local.gov.uk/c/document_library/get_file?uuid=a20d3888-56e0-4ce9-8621-beb4eaa6befd&groupId=10180d



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We consider requests on an individual basis.

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