

Policy Title	Learning and Development (L&D)
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1. Introduction

West of Scotland Housing Association is a dynamic and people-friendly organisation which strives to support its employees' development, at the same time ensuring that such development is relevant and supports the business. It is acknowledged that training and development are best self driven by individuals, although management and the business policy have a role to play in encouraging individuals to take the initiative.

The approach to staff training and development varies between different industries and sectors. Some "professions" require an element of continuing professional development (CPD) and set a requirement in terms of days/hours per year. Often such activity will be process specific and directly required to do the job (e.g. a new machine is introduced and staff need to be shown how to work it, health and safety required training, food hygiene, manual handling & lifting etc). Such activities will not however be labelled as development for the purpose of this policy. Some occupations have semi formal standards for the level of CPD that is to be attained each year. It's worth remembering that CPD is only one aspect of training and for the purpose of this exercise we are looking at training in its wider meaning.

2. Policy principles

West of Scotland Housing Association's Learning and Development Policy aims to:

- Ensure fairness, clarity and consistency for all West of Scotland Housing Association's staff members.
- Provide a framework for ensuring that the business as well as employees benefit from development activities undertaken.
- Assist West of Scotland Housing Association's staff members with their continuous professional development.
- Assist a development discussion between staff and their line managers during appraisals.
- Promote considering alternative methods of training to attending courses and conferences.
- Promote a culture of sharing knowledge and skills with work colleagues.

3. Responsibilities

The Association fully supports the L&D of its staff by:

- Providing resources such as finance, equipment, time and opportunities to ensure that everyone has the correct skills and knowledge required to carry out their roles.
- Ensuring that all line managers are aware of their role with regard to supporting L&D activity, and that they have the skills and knowledge required to identify L&D needs and to follow through with the implementation of that L&D for all individuals.
- Encouraging individuals to pursue business relevant development over and above their job role and to give consideration to career development.
- Offering L&D on a fair basis to all employees and ensuring that no individual receives less favourable treatment or consideration in relation to L&D on the grounds of their gender, sexual orientation, racial group, marital status, disability, age, religion or religious beliefs, or any other unlawful criteria or circumstances.

3.1 Corporate Management Team are responsible for:

- Identifying corporate training needs, in conjunction with the **HR/Organisational Development team**, in line with the needs of the organisation and the business planning process.
- Agreeing the annual budget for L&D following consideration of the draft annual L&D plan.
- Ensuring that staff are equipped to comply with mandatory requirements laid down by statute e.g. Health and Safety requirements
- Considering requests for vocational training and what, if any, part of the overall L&D budget or resource should be apportioned to the provision of such.
- Reviewing the evaluation of L&D annually to ensure that any L&D activity has met its original objectives and, has had an impact on the performance or compliance of the Association.

3.2 Managers are responsible for:

- Ensuring that all new members are provided and supported with a comprehensive and structured induction plan at the commencement of their employment with the Association. This should be created and delivered with support from the **HR/OD team**.
- Engaging in formal personal development planning discussions.

- Ensuring the outcomes of these discussions are clearly expressed as L&D needs and are prioritised on a Personal Development Plan (PDP).
- Identifying L&D needs, at the earliest possible opportunity, that are closely linked to our vision and values, our statutory obligations, wider organisational goals, team objectives and the individual's performance objectives.
- Discussing and agreeing L&D activity with all their staff at induction, probation, monthly one to one meetings and regular performance and development appraisal reviews.
- Considering ad-hoc L&D requests when individual or team learning needs arise out with the annual performance and development circle review process.
- Supporting individual team members by helping them to clearly identify L&D needs.
- Discussing the individual's career aspirations and including any reasonable aspirational learning activities on the Performance and Development Appraisal review form. Aspirational learning may include professional qualifications or on-the-job learning to support them in taking on more responsibility or moving to a bigger role.
- Ensuring that a learning and development request form (appendix 1) is completed prior to every episode of L&D that involves a cost and/or time away from the workplace.
- Ensuring that pre-evaluation discussions take place to ensure that L&D activity is being driven by a legitimate business need.
- Managing individual expectations to ensure there are appropriate resources and/or time to enable the activities detailed on the PDP to take place.
- Ensuring that agreed L&D takes place and is used effectively and efficiently in the workplace.
- Ensuring that L&D is included as a standard agenda item for all departmental team meetings.
- Effectively sharing knowledge from investment in L&D activities, throughout the Association as appropriate.
- Exploring creative solutions where L&D gaps exist.
- Ensuring that any relevant procedures and processes, in relation to the management of L&D activity, are fully complied with.
- Ensuring with the **HR/OD team** that all L&D activity has sufficient budget provision prior to approval.
- Evaluating the L&D that has taken place, following an activity, by having a discussion with the individual or team.
- Assisting the Association to evaluate the impact of the L&D at organisational, team and individual level as appropriate.
- Ensuring that all mandatory L&D activities are completed in conjunction with the **HR/OD team**.

3.3 Employees are responsible for:

- Ensuring that they give thought, prior to their induction, probation, one to one monthly meetings and performance and development appraisals reviews, to any L&D they think might

assist them to meet individual, team and organisational objectives, and the best and most cost effective way to meet these needs.

- Ensuring that their personal development plan is a current, specific and actionable record of the agreed areas for L&D.
- Reviewing progress against their PDP.
- Recording all L&D activity using the Record of Learning and Development. (appendix 2) which is held electronically on the Corporate Services drive in individual staff folders.
- Making sure that a continuous conversation throughout the year takes place with their line manager to identify appropriate L&D opportunities outwith the cycle of performance and development reviews, and to discuss and agree these fully with their manager.
- Completing a learning and development request form (appendix 1) prior to any episode of L&D that involves a cost and/or time away from the workplace, and that a pre-evaluation discussion with their manager takes place to ensure that the activity is being driven by a legitimate business need.
- Ensuring that any relevant procedures and processes, in relation to L&D activity, are fully complied with.
- Ensuring that any agreed L&D activity takes place within the agreed timescales.
- Attending all L&D (mandatory and developmental) that has been arranged (whether internal or external), or to give reasonable notice to cancel. Reasons for cancellation must be discussed and agreed with their line manager. Where applicable, the employee must take all reasonable steps to ensure that cancellation fees are not incurred.
- Raising concerns they may have, with their line manager, over their ability to apply the new learning they have acquired.
- Utilising the learning acquired through L&D activities to the benefit of the organisation.
- Sharing their L&D with colleagues (as appropriate) and to act as champions in the area of sharing knowledge with others.
- Assisting the Association to fully evaluate the L&D by providing information and open and honest feedback.

3.4 HR/Organisational Development are responsible for:

- Managing the associated budget headings for all L&D and activities.
- Ensuring that all staff are provided with a comprehensive and structured induction plan at the commencement of their employment with the Association. This should be created and delivered in conjunction with the employee's line manager.
- Ensuring the policy and procedures are understood across the organisation.
- Regularly reviewing this policy, in conjunction with Corporate Management Team, in line with the needs of the organisation and the corporate planning process.
- Ensuring that all staff have induction, probation and performance and development appraisal reviews.

- Formulating the information from the performance and development appraisal reviews and any ad-hoc requests on L&D into a draft L&D plan.
- Ensuring that CMT agree the L&D plan and the resources required to deliver the final version of the plan.
- Ensuring, in liaison with the Corporate Management Team and line managers that the L&D supports the vision and values of the Association, the strategic aims of the organisation, departmental plans and individual needs.
- Supporting the Association to explore a range of L&D interventions that support the business and departmental and individual needs.
- Ensuring that L&D is evaluated at individual, team and organisational level to guarantee that it meets the original objectives of the learning, and that it improves the performance of individuals, teams and the Association.
- Providing CMT with an annual L&D evaluation report on the effectiveness of all L&D activity.
- Maintaining records of any L&D undertaken, both general and vocational, to ensure that there is consistency and fairness applied to all decisions made with regard to requests for training.
- Creating an electronic individual staff folder in the Corporate Services drive that staff can use to manage and record their own record of learning and development.
- Supporting managers to comply with mandatory training requirements.

4. Learning & Development Activities and Resources

The Association will meet the L&D needs of employees in the following ways:

4.1 Training budget

Applications for training/conference fees to be subsidised fully or partially by West of Scotland Housing Association will be subject to availability of funds in the training budget held by the **HR/OD team**.

4.2 Induction

The Association recognises that all new employees and all staff who are promoted or transferred will require adjustment in their new roles. By providing a comprehensive induction programme, the Association aims to give the required support to those individuals through tailored Induction, as well as addressing any individual L&D needs that have been identified through the recruitment and selection process and via discussion with their line manager.

Induction ensures that all new starters understand:

- the history of the Association
- the business plan
- the reporting structures and the accountabilities within the Association

- the work of the different roles within the Association
- the culture and values of the Association
- the goals and the aspirations of the Association
- how their role fits in with the team and the Association as a whole
- their objectives for the next period (up until the next formal review, which may be a probation period).
- the policies, procedures and processes that govern the Association
- the content of the Association's Terms and Conditions of Employment
- how their L&D needs will be addressed

Induction is also viewed as a valuable opportunity to establish networks and meet other colleagues both internal and external to the Association.

Induction also ensures that those staff who have been promoted or transferred understand:

- the aim of the new role and the responsibilities
- their job role and how it fits in with the team and the Association as a whole
- their objectives for the rest of the period
- how their L&D needs will be addressed.

4.3 L&D Activities

A creative approach to identifying appropriate L&D activity (in line with the Performance and Development Appraisal review) will be embraced by the Association.

The Association will support mandatory training where legislation requires an organisation to fulfil legal obligations.

Consideration will be given to L&D activity that equips staff for the efficient performance of present or foreseeable future responsibilities. This may take a variety of forms including:

- planned L&D activity
- professional CPD
- development programmes
- conferences
- briefing sessions and seminars
- secondment opportunities
- reading
- coaching from colleagues or managers
- working groups
- job shadowing
- e- learning and development
- continuing professional development

All L&D activity should be identified and agreed with line managers and a learning and development request form completed where appropriate. The employee is responsible for recording all learning and will use their Record of Learning and Development (Appendix 2).

4.4 Vocational Training / Further Education / Professional Qualifications

This type of L&D activity (e.g. SVQs, degree courses, diploma courses, etc.) enables employees to acquire a recognised qualification directly related to present or foreseeable future responsibilities. Responsibility for the authorisation of this type of learning falls with the Corporate Management Team via the Department Director who will be supported by the **HR/OD team** to ensure consistency and fairness are applied to the approval of vocational learning and development requests.

Any employee wishing to make a request for sponsorship (time and/or course funding) should complete a Vocational Learning and Development Request Form (Appendix 3) which can be found on the intranet.

Suitability for all such courses should be considered with particular regard to the following:

- The circumstances surrounding the work of the employee and that of the Association that will allow training to be undertaken,
- The learning needs of the employee fit into the business priorities of the Department concerned and the Association as a whole,
- The capacity of the employee to benefit substantially from a course of study and the resulting benefit to the Association,
- The length of service and conduct of the employee.

The Association will support individuals who wish to pursue professional qualifications, based on the following criteria:

- The request has been made via the annual Performance and Development Appraisal process and has been approved by CMT and supported by their Director and line manager in advance of any formal course booking being made.
- The need for this development can be met from the relevant budget (i.e. funds availability).
- On-going financial support must be requested and authorised on an annual basis via the Performance and Development Appraisal review process. Individuals will be made aware by the CMT, **HR/OD team** and their manager that funding cannot be guaranteed for the duration of study.

- The individual must have been employed by the Association for at least 12 months.
- The course of study directly links to their Performance and Development Appraisal review and will support them in their role within the Association.
- The performance and conduct of the individual is of a consistently high standard. For example they achieve their objectives consistently and their record of attendance record is exemplary.
- Their attitude and approach is consistent with the Association's values.

4.5 Funding for Vocational Courses

This will be a matter for CMT ultimately and at the discretion of the Departmental Director in conjunction with the **HR/OD team**, and for appropriate courses (such as those leading to technical or professional qualifications), up to 100% financial assistance may be awarded for approved costs and fees. Fees will be paid directly to the educational body/institution.

Rules applicable to the above funding are as follows:

- The fees paid are to be regarded as a loan. The loan will be written off 12 months following completion of the relevant course / final examination. The Association retains the right to require the employee to refund either full or a proportion of the cost of fees where the individual voluntarily leaves their employment within those 12 months, or where the individual or the training institution prematurely terminates their course or where the individual is dismissed summarily from employment. Individuals whose fees are paid will be required to sign an undertaking to repay their fees in the event that they leave their employment within 12 months of the end of the course.
- Withdrawal from a course will result in repayment of the fees paid on the basis of the above, unless the individual, on presentation of written justification, has obtained the agreement of their Director to withdrawal, or the employee has had to withdraw due to long term sickness, maternity leave or redundancy.
- Day release courses may be authorised where the course is directly applicable to the employee's role. This is subject to staffing levels and the endorsement of the employee's line manager.
- Up to 100% funding may be given for courses outwith office hours e.g. evening courses/classes, distance learning, where the course is directly applicable to the employee's role. However, in

recognition of the commitment to the course of study the individual will not be credited with time past 5pm.

4.6 Study Leave

Leave of absence with pay will be granted to individuals to enable them to sit examinations for courses approved by Departmental Directors. Such leave with pay will include the previous half day (where the examination itself lasts half a day) or the previous day (where the examination is over a full day). Individuals who are on continuous assessment courses will be given up to 2 day's leave with pay each course year to complete necessary course-works, assignments, etc.

Requests by employees to take leave around the time of examinations will be considered sympathetically.

Leave of absence with pay will be granted to individuals for attendance at any subsequent Graduation ceremony.

4.7 Book Allowance

The Association will meet the cost of essential text books up to a maximum of £50 per annum on production of receipts.

5. Professional Membership Fees

The Association will reimburse annual fees paid by employees for membership of professional institutions subject to the following criteria:

- Membership must be directly relevant to the requirements of the post and the work of the Association.
- Only one set of fees will be reimbursed where the employee is a member of more than one body.
- Receipts for claims are submitted to and endorsed by the HR/Organisational Development team.
- Payment will be made in full and then included on a P11D annually.

6. Learning & Development Evaluation

The Association recognises the importance of effective evaluation. It is expected that all individuals who have been supported in their L&D will assist in the process of evaluation. The **HR/Organisational Development team** will produce and deliver an annual report to the CMT on the effectiveness of all L&D activity.

Evaluation will take place at three intervals:

- prior to the L&D activity
- immediately following the L&D activity
- six months to one year after the L&D activity

This will be done in a number of ways:

- Pre evaluation - this includes discussion and agreement of learning at induction, probation, monthly one to one meetings, interim and annual performance reviews or ad hoc discussions. This will also take place when the L&D request form is completed.
- Post evaluation – on completion of the L&D the individual will be responsible for completion of the evaluation for short training courses which can be found on the staff intranet under the Training tab.
- Evaluative discussion at one to one, 6 monthly and annual appraisal reviews.

From the above information, the **HR/Organisational Development team** will look at individual, team and organisational levels to ensure that the L&D is:

- meeting individual, team and organisational L&D objectives
- being used in the workplace
- beneficial in terms of business outcomes effective in terms of content and method of delivery, and where it is not, will review that particular approach.

7. Associated forms

The following forms have been prepared to assist the implementation of this policy:

- Learning and development request form – Appendix 1
- Record of training and development undertaken form – Appendix 2
- Vocational course request form – Appendix 3

Appendix 1

Learning and Development Request Form

Name	
Activity	
Provider	
Date	
Cost	
Duration	
Was this identified as part of your annual appraisal?	

What is the objective of this L&D activity?

How does this support our business objectives and how will you share this knowledge with your colleagues?

How will you evaluate this once you return to work?

Signed:
(Employee)

Date:

Signed:
(Line Mgr)

Date:

A copy of this form should be sent to **HR/OD.**

Appendix 2

Record of training and development undertaken

Employee's name

Department

Covering period from *month year* to *month year*

Key dates and number of days (part days)	What did you do and why?	What was the method of the training/development?	How did 1) you and 2) business benefit from this?	How have/will you use this? Any further action?

Appendix 3

Vocational Course Request Form

Name	
Course	
Requested Start Date	
Term Dates	
Duration of course	
Cost (approx.)	

Please give reasons why you want to undertake the course and the level of commitment you will give to it.

What is the business benefit of you undertaking the course?

How will this be evaluated / measured?

Please state the University / College you want to study at (you can give more than one option). (Please advise the day of the week the course is being held)

College	Day of Week	Times

Please indicate the methods of study you are willing to commit to

Day Release		Night School	
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Twilight		Distance Learning	
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Training and Development Declaration

I confirm that I have read section B4 of the Terms and Condition of Employment and I am aware that if I leave the course early or if I leave employment prior to 12 months following the completion of my course, I will be responsible for repaying of course fees.

Employee signature Date

Please Note - All requests are considered at the CMT annual training plan meeting.

Manager comments

Supported		Further consideration needed	
Recommended this year		Delay until:	
Comments			

Director comments

Supported		Further consideration needed	
Recommended this year		Delay until:	
Comments			

CMT recommendation

Approved		Delayed	
Comments:			

Return completed form to OD

For OD use only

Course Start Date	
Course Finish Date	
Date Training Loan Written Off	