

## Learning & Development Policy

### Policy Number HR17

---

<b>Prepared By</b>	HR & Corporate Services
<b>Policy Created</b>	Learning & Development Policy
<b>Effective Date</b>	April 2019
<b>Review Date</b>	April 2022
<b>Posted on Website</b>	Yes

If you need this publication in larger print, audio form, Braille, or in another language, please contact our office and we will try to help you.

## **1. Introduction**

- 1.1 Clyde Valley Group is a dynamic and people-friendly organisation which strives to support its employees' learning and development (L&D), at the same time ensuring that such learning and development is relevant and supports the business objectives. It is acknowledged that learning and development are best self-driven by individuals, although management and the business priorities have a role to play in encouraging individuals to take the initiative.
- 1.2 The approach to employee learning 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.). 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 learning and development and for the purpose of this exercise we are looking at learning and development in its wider meaning.

## **2. Policy principles**

- 2.1 Clyde Valley Group's (CVG) Learning and Development Policy aims to:
- Ensure fairness, clarity and consistency for all employees.
  - Provide a framework for ensuring that the business as well as employees benefit from development activities undertaken.
  - Promote a culture of sharing knowledge and skills with work colleagues.
  - Assist CVG's employees with their continuous professional development.
  - Assist a learning and development discussion between employees and their line managers during induction, appraisals and one to ones.
  - Promote consideration of alternative methods of learning and development to attending courses and conferences.

## **3. The role of the line manager**

- 3.1 It is acknowledged that personal learning and development is self-driven. However, CVG also recognises the motivational role of line managers who should encourage employees to take the initiative. Employees are required to discuss with their line manager how the learning and development they wish to undertake would enhance performance in their role and meet CVG's business objectives. It may be that the learning would benefit other colleagues or individual employees, increasing their efficiency and thus making them more valuable to CVG. The learning and development request form (Appendix A) will prompt employees to think in these terms when planning their learning and development.

#### **4. Line Manager Responsibilities:**

- Creating a comprehensive induction programme for each new or newly promoted employee.
- Ensuring that all statutory L&D is undertaken by employees.
- Discussing individual learning and development needs at induction, probationary reviews, one to one meetings and during annual and six monthly appraisal meetings. Line managers where applicable will also carry out an annual Team Training Needs Analysis (Appendix B)
- Ensuring that the relevant L&D process is fully complied with.
- Ensuring that all agreed L&D takes place and is used effectively in the workplace.
- Supporting employees who undertake formal qualifications by offering, if possible, organisational support/a buddy and having regular review discussions regarding progress and support required.
- Effectively sharing knowledge from investment in L&D activities throughout the organisation as appropriate.

#### **5. The role of the employee**

5.1 All employees should keep their own simple record of learning and development tackled throughout the year (Appendix C). Forms are provided to complement this policy. This can be used by employees to discuss their development with their line managers regularly throughout the year, rather than leaving such discussions to the appraisal meetings only.

#### **5.2 Employee responsibilities:**

- Identifying L&D they consider might be required in order to meet individual, team and organisational objectives.
- Ensuring that any relevant procedures and processes, in relation to L&D activity are fully complied with.
- 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.
- Where applicable, utilise your buddy/support person; sharing their L&D with colleagues and to act as champions in the area of sharing knowledge with others.
- Assisting CVG to fully evaluate the L&D by providing information and open and honest feedback.

#### **6. The Role of HR/Organisational Development**

##### **HR/OD responsibilities:**

- Ensuring the L&D policy and procedure is understood across the organisation.
- Supporting line managers to provide a structured induction programme for all new and newly promoted employees.
- Co-ordinating the organisational L&D plan recording information from the appraisal process, team TNA information and ad hoc L&D requests.
- Managing the overall L&D budget.
- Approving L&D requests in line with the priorities within the CVG People Strategy.

- Supporting individuals and teams with arrangements to undertake L&D activities including ensuring that all L&D attendance sheet (Appendix D) is completed for all group L&D events.
- Co-ordinating the evaluation of all L&D activity.
- Regularly reviewing the L&D Policy and Procedures.
- Providing an annual report of L&D activity and impact to the Executive Team.

## **7. Learning and development budget**

- 7.1 All requests for learning and development to be funded fully or partially by CVG will be subject to budget availability.

## **8. Learning and development Activities**

- a. CVG will support mandatory learning and development where legislation requires the organisation to fulfil legal obligations.
- b. All other learning and development activities will be delivered in line with the priorities set out in CVG's People Strategy.
- c. Learning and development activities, include induction, conferences, courses, e-learning, professional CPD, job shadowing, reading and self-guided learning, attending sessions run by colleagues, etc. Staff are encouraged to consider various methods of learning and development, in light of their suitability for the purpose and to suit individual preferences.

## **9. Coaching**

- 9.1 CVG is committed to people and embedding a coaching culture throughout the Group. Coaching is the highest form of internal learning and support and will be rolled out within CVG in a systematic manner.

## **10. The appraisal process**

- 10.1 In order to prompt a meaningful discussion between the employee and their line manager as well as to help achieving the outcomes set by this policy, a discussion on learning and development activities has been incorporated into the standard appraisal form. Appraisers and employees should work together in achieving this level of focussed learning and development – all of which should be driven by the staff appraisal system, which will heavily reflect business priorities.

## **11. Further Education**

- a. If you want to undertake part-time further education courses directly relevant to your role and your career, you can discuss this with your line manager and see what support CVG can provide.
- b. This type of L&D activity enables employees to acquire a recognised qualification directly related to present or future job roles. Responsibility for the authorisation for this type of learning lies with the Executive Team and will be in line with the priorities set out in the People Strategy. This will ensure consistency is applied to the approval of vocational learning and development requests.

- c. Any employee wishing to make a request for sponsorship should complete a Further Education Course Request Form (Appendix E).
- d. Day release courses may be authorised where the course is directly applicable to the employee's role or future career.
  - e. CVG may support individuals who wish to pursue professional qualifications, based on the following criteria:
    - The circumstances surrounding the work of the employee and that of CVG that will allow learning and development to be undertaken.
    - The request has been made via the annual appraisal process and has been supported by the line manager and departmental Director and approved by the Executive Team in advance of any formal course booking being made.
    - There is sufficient budget available to meet the cost of the learning and development.
    - Ongoing financial support must be requested and authorised on an annual basis via the appraisal process. Individuals will be made aware by the line manager that funding cannot be guaranteed for the entire duration of study.
    - The individual must have been employed by the Association for at least 12 months.
    - The course of study directly links to the learning needs of the employee, as identified during the appraisal process, and how it fits with the needs of the business.
    - 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 CVG's values.

## **12. Support**

- 12.1 The line manager will monitor an employee's progress on a course of study. However, all employees studying for a recognised qualification may (if possible) have regular meetings with a support/buddy within the Group who will be able to help the student to complete the course. Where possible this should be someone who has recently completed a qualification or has relevant job role experience that will be beneficial to the individual's studies.

## **13. Funding for further education**

- a. For appropriate courses (such as those leading to technical or professional qualifications), CVG may provide up to 100% of the cost or fees.
- b. The fees paid are to be regarded as a loan. The loan will be written off 12 months following completion of the relevant course or final examination. CVG 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 a Learning and Development Agreement whereby they may repay their fees in the event that they leave their employment within 12 months of the end of the course. (Appendix F).

- c. 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 withdraw, or the employee has had to withdraw due to long term sickness, maternity leave or redundancy.
- d. Up to 100% funding may be given for courses out with office hours e.g. evening courses/classes, distance learning, where the course is directly applicable to the employee's role. In recognition of the commitment to the course of study the individual will be credited with time to 5pm on the days that the employee attends the course.

#### **14. Study leave**

- a. CVG will allow paid leave for study purposes at a rate of one day per examination for all approved day release or evening courses of study.
- b. Individuals who are on continuous assessment courses will be given up to a maximum of 5 days of study leave with pay each course year to complete necessary course works assignments. The number of days provided will be at the line manager's discretion and the timing of such leave will require their approval.

#### **15. Examination leave**

- a. We will give you paid leave to sit examinations for courses approved by the Executive Team. This leave with pay will include the previous half-day (if the examination lasts half a day) or the previous day (if the examination is over a full day).
- b. Request by employees to take leave around the time of examinations will be considered sympathetically.

#### **16. Graduation leave**

- a. A half day of special leave with pay will be granted to individuals for attendance at any subsequent Graduation ceremony for an employee on an approved course.

#### **17. Books**

- a. CVG will meet the cost of essential text books and course examination fees up to a maximum of £75 per annum on production of receipts.
- b. The employee will donate course books to the value of £75 to CVG on completion of the course.

#### **18. Professional Membership Fees**

- a. CVG may refund annual fees you pay for membership of professional institutions depending on the following conditions:
  - Your membership must be directly relevant to your job role

- CVG will only refund one set of fees if you are a member of more than one institution
- You will need to be able to provide receipts for the fees
- We will make payments after tax.

## **19. Learning and development evaluation**

- 19.1 CVG recognises the importance of effective evaluation. All individuals who have been supported in their L&D will assist in the process of evaluation.
- 19.2 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.
- 19.3 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 appraisals or ad hoc discussions. This will 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 normally via Survey Monkey.
  - Evaluative discussions at one to one meetings, 6 monthly and annual appraisal reviews.

## **20. Sharing the knowledge**

- 20.1 It is acknowledged that there is a lot of specialised knowledge held amongst CVG's staff that could better benefit colleagues and the organisation were it to be shared. This policy aims to encourage colleagues to share their knowledge and skills with each other. Each staff member should aim to take the time to share knowledge for the greater benefit of CVG. Such activities could be formal, semi-formal, structured and prepared and may take place at team meetings. However, colleagues could simply send round a paper from a publication, a note from a briefing session or support someone when job shadowing.
- 20.2 Gaining diverse knowledge and skills from colleagues can also effectively help in enhancing people's career prospects and employability.
- 20.3 Although all staff will be encouraged to attend a session run by their colleagues, such attendance might be voluntary. This is to reflect the fact that some of our development gains may be of little interest or relevance to colleagues. The demands of the business at any given time must also be accounted for.

## **21 Appendices**

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

- |                                         |            |
|-----------------------------------------|------------|
| • Learning and Development Request Form | Appendix A |
| • Annual Team Training Needs Analysis   | Appendix B |
| • Record of Learning and Development    | Appendix C |
| • L&D Attendance Sheet                  | Appendix D |
| • Further Education Course Request Form | Appendix E |
| • Learning and Development Agreement    | Appendix F |
| • Personal Development Plan             | Appendix G |

## Appendix A

### Learning and Development Request Form

Name	
Activity	
Provider	
Date	
Duration	
Cost	
Has budget been approved?	
Is CS support required? Details	

What is the objective of this L&D activity?

--

Which of our strategic aims does this activity meet (tick box)?

1 - Provision of innovative solutions and appropriate support to improve health, wellbeing and tenancy sustainment.
2 - Well governed, delivering best value, ensuring efficiency.
3 - Supply of good quality housing across all tenures.
4 - Excellent services and opportunities for our people.
5 - Regeneration, investment and sustainability of our homes and communities.

How will you and the Association benefit from this activity once you return to work?

--

Signed:  
(Staff)

Date:

Signed:  
(Manager))

Date:

## Appendix B

A copy of this form should be sent to Corporate Services

### Training & Learning/Development Needs Analysis

<b>Name:</b>		<b>Line Manager:</b>	
<b>Department:</b>		<b>Date:</b>	
<b>Team:</b>			

The aim of this TNA is for you to specify the training or learning interventions you would like to request for your team for the forthcoming year.

#### **Section 1**

Please consider the topics listed in the table and assess your current skills gaps within your team. These are not exhaustive and please feel free to record any areas that you feel have not been covered.

If you can identify any areas requiring training/development please indicate the groups of staff (or individuals) this is applicable to and your suggestions for a method of addressing the issue (i.e. formal courses, workplace coaching, in-house delivery etc.).

<b>Topics</b>	<b>Issues</b>	<b>People applicable to</b>	<b>Action/suggested delivery method</b>
Customer Service			
Health & Safety			
IT (State package / system)			
Personnel Effectiveness (e.g. Communication, time management etc.)			
Any other (e.g. recruitment and selection, PDR, legislative changes etc.)			

<b>Section 2 - Strategic training needs</b>	
<p>Are there any significant changes, service improvements or operational challenges that will require training support during the year?</p> <p>If yes, what specifically is the training/development need?</p>	
<b>Section 3 - Professional training</b>	
<p>Are you aware of any (new) programmes of technical training that will be relevant to your team? If so please state the subject and who it will be relevant to.</p>	
<p>Are there any members of your team that you would recommend to undertake management development training? If so please state who and the level required.</p>	
<b>Section - Team development / building – to be completed by Line Managers</b>	
<p>Will you be requesting any team development / team building sessions during the year?</p>	
<p>What are the objectives of the request?</p>	
<p>What time of year would you like it to be held?</p>	
<b>Section 6 – Other – to be completed by Line Managers</b>	
<p>Do you require support from the HR/ OD team on any projects, design or facilitation of events during the year? If so what, and could you give any rough timescales?</p>	
<p>Do you have any other comment about the general format and accessibility of learning/development within the Association?</p>	

## Appendix C

### Record of learning and development undertaken

Employee's name

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 learning & development?	How did 1) you and 2) business benefit from this?	How have/will you use this? Any further action?

## Appendix D

### LEARNING AND DEVELOPMENT ATTENDANCE SHEET

Course Name :
Facilitator :
Date :

NAME	DEPARTMENT	SIGNATURE
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		
12.		
13.		
14.		
15.		
16.		
17.		
18.		
19.		
20.		

## Appendix E

### Further Education Request Form

Employee Name:		Position:		Grade:		Length of Service:		Application by: Employer or Employee			
SPONSORSHIP REQUEST						PREVIOUS APPLICATION FOR SPONSORSHIP/TRAINING					
Course Title:	College / University	Duration	Attendance Day Release/ Part Time <sup>1</sup>	Start Date	Cost £ <sup>2</sup>	Yes/No	Title of Course / Qualification	Duration	Start Date	Attendance Day Release/ Part Time <sup>3</sup>	Cost £ <sup>4</sup>
Fit with Corporate Plan/Strategy											
How many classes are you required to attend during working hours per year of study?						Classes per Year		Duration of Each Class (Hours)			
How many classes are you required to attend out with working hours per year of study?						Classes per Year		Duration of Each Class (Hours)			
On average, how many hours per week of home study do you intend to complete?											
How many closed book exams are you expected to sit –						Per Year: At end of course:					
Are the fees higher than one month's salary? <i>If yes and if the course is not completed or you leave within 12 months of completion, you may be required to enter a repayment arrangement.</i>						Yes <input type="checkbox"/> No <input type="checkbox"/>					
Date of Application:		Date College/ University to be notified by:				Line Manager / Director Recommendation: Approve/ Decline/ Postpone/ Withdrawn					
Application considered by Line Manager:						Decision of Director/ C Exec: Approve/ Decline/ Postpone/ Withdrawn					
Signature: Date:						Signature: Date:					

<sup>1</sup> Evening &/or weekend

<sup>2</sup> Including VAT

<sup>3</sup> Evening &/or weekend

<sup>4</sup> Including VAT

Between

**CLYDE VALLEY HOUSING ASSOCIATION  
(The Employer)  
and  
(The Employee)**

The Employer hereby agrees to meet the full cost of course and any examination fees incurred by the Employee in pursuing the following professional qualification: -

The qualification

This approval is subject to the following conditions, as per the Associations Learning & Development Policy and the terms and conditions of employment.

- (a) Approval of all formal courses will be subject to the staff member concerned signing this agreement to abide by the Association’s Staff Learning & Development Policy unconditionally.
- (b) If the employee leaves their employment with the Clyde Valley Group, or is dismissed before the end of 12 months after completing the course or if they leave the course (or the institution makes them leave), the employee will refund CVG an amount to cover the period of service the employee would be due to work. This will be worked out using all money loaned to the employee for the course of studies.
- (c) Where the Employee fails to complete the course within the agreed time frames or ceases the course prior to its' completion, he/she shall repay to the Employer all course fees and examination fees in connection with the entire duration of the course.

By his/her execution of this Agreement, the Employee consents to a deduction from salary or other payments due to the employee under the contract of employment, of a sum equivalent to the amount incurred by the Employer under clause (b) or (c) above (as applicable).

The Employee also consents (by his/her execution of this Agreement) to enquiries being made of third parties as to the progress of the Employee on the relevant course or courses always providing that said enquiries shall be made by the Line Manager, HR & Corporate Services Manager or departmental Director.

Signed .....  
(for and on behalf of the Employer)

Date .....

Signed .....  
(Employee)

Date .....

**Appendix G  
PERSONAL DEVELOPMENT PLAN**

<b>Strategic Objectives</b>  Please use the relevant strategic objective	<b>Learning and Development Need</b>	<b>Type of development</b>	<b>Timescales</b>	<b>Who is responsible?</b>	<b>Further comments</b>