




PORT OF LEITH
HOUSING ASSOCIATION

EMPLOYEE LEARNING AND DEVELOPMENT MANAGEMENT POLICY AND PROCEDURES 2019

FULL REVIEW TRACKING

A “Full Review” refers to a point when the whole document is reconsidered by appropriate stakeholder to establish if it is still fit for purpose and this is formally signed-off at the appropriate management level. This acts as assurance the Association’s position on key matters is up to date with legislation, regulation and good practice.

Policy Owner	Director of Finance & Corporate Services
Document Author(s)	Corporate Services Manager
Approved By	OMT
Review Cycle	3 years
Next Review Date	May 2022
Communication & Training Methods	As part of induction 1:1s / reviews
The Policy has a direct link to the following PoLHA policies and procedures	<ul style="list-style-type: none"> • PoLHA Induction Policy • Performance & Recognition Management Policy • Equality & Diversity Management Policy • Learning & Development Pre-course Evaluation Form • Learning & Development Evaluation Form • 2017 – 2020 Learning and Development Strategy
This policy complies with the requirements of these legal and/or regulatory documents	<p>Equality Act 2010</p> <p>FREDIE principles</p> 
Equality & Diversity Impact (EI) Assessment Status	<p>This document was EDI Assessed by Glen White and Heather Kiteley using the organisation’s set procedure in August 2019 and is considered to be free of anything which may lead to any unfair discrimination in its application.</p> <p>EI Assessment records are held by Corporate Services and can be accessed on request to the Corporate Services Manager.</p>

REVISION TRACKING

Revisions are minor changes which are made between Full Reviews which might be needed because of new ideas or changes

Revision Date	Part of doc revised	Reason for revision	Approved by

THE POLICY

1. INTRODUCTION

The POLHA Group is committed to the professional and personal development of employees encouraging them to build knowledge, skills and behaviours to enable them to perform their role effectively and maximise their contribution to the success of the organisation.

2. AIMS OF THE POLICY

2.1 The policy is designed to ensure that:

- Training and development activities support the attainment of the organisation's objectives
- Enhance the contribution that employees make in their day-to-day roles
- Provide for a systematic evaluation of the impact of training and development activities and the investment made
- Whether the training delivered its expected outputs and was good value is evaluated
- To ensure fairness of opportunity, detailed training records are kept

2.2 The organisation believes that learning and development is a continuous process. There is an expectation that staff will keep abreast of developments within their own area of expertise, and all staff are encouraged to undertake development activities throughout their working lives.

3. EQUALITY, DIVERSITY AND INCLUSIVITY

3.1 The organisation will ensure that this policy is applied fairly and consistently to all employees and includes both full-time, part-time, fixed term and permanent staff. We will not directly or indirectly discriminate against any person or group of people because of their race, religion / faith, gender, disability, age, sexual orientation or any other grounds set out in the Equality and Diversity Management policy.

3.2 The Investors in Diversity FREDIE principles of fairness, respect, equality, diversity, inclusion and engagement are applied.

3.3 This policy and any other Port of Leith publications is available in other formats eg other languages, Braille, Large Print and audio.

4. RESPONSIBILITIES FOR STAFF DEVELOPMENT

4.1 Individual Responsibility

It is the responsibility of each member of staff to:

- Follow the organisation's Learning and Development Management policy and procedures
- Take responsibility for their own continuous development in the context of review and appraisal mechanisms with their Line Manager
- To comply with the requirement for all staff development activities to be agreed, monitored and evaluated

4.2 Line Management Responsibility

It is the responsibility of the line manager to:

- Ensure that staff attend any mandatory training identified as part of the organisation's corporate plan
- Ensure the staff development is appropriate, meets the agreed objectives and is fully evaluated
- Follow the organisation's Learning and Development Management policy and procedures
- Ensure that annual reviews are appropriately conducted and that support for continual professional development is given to each individual
- Ensure that all staff have the opportunity to review their development requirements on a continuous basis through support and supervision at their 1 :1 meetings

4.3 Organisational Responsibility

These may arise as a result of new projects, changes in legislation, the introduction of new policies and procedures and should be considered by Leadership Team and Operational Managers as part of the business planning process. Other needs may be identified throughout the year as a result of specific interventions eg quality framework assessments, reviews and audits. The Corporate Services Manager should be advised of these at the earliest opportunity to allow resources to be made available and the appropriate planning measures to take place.

5. THE HUMAN RESOURCES (HR) FUNCTION

5.1 The HR function has a facilitation role in relation to learning and development.

5.2 This includes:

- Advising and encouraging individuals and those with line management responsibilities about learning and development matters
- Co-ordinating the delivery of learning and development activities
- Managing the budget for learning and development activities and ensuring consistency of allocation

- Maintaining records with regard to the development of the organisation's staff
- Preparation of the organisation's annual training plan
- Ensuring the evaluation process has been carried out

6. BUDGET

6.1 The organisation will make provision for staff training in its annual revenue budget. The Learning and Development Review process will highlight the requirement for training and its expected cost each year, prior to the next year's budget being set. The Corporate Services Manager holds responsibility for this budget.

PROCEDURES

7. IDENTIFICATION OF TRAINING NEEDS

- 7.1
- As part of the performance management process all staff will meet with their Line Manager to identify their learning and development needs and the outcome of this will be a Learning and Development Plan. The plan will document and agree what needs to be done by whom and when to ensure the learning and development takes place
 - All staff have the opportunity to review their development requirements on a continuous basis through support and supervision at 1:1 meetings with their Line Manager
 - The needs of staff new to the organisation should be identified in accordance with the Induction Policy, Procedures and Induction checklist
 - The needs of staff transferring to a new role within the organisation should be discussed within four weeks of taking up position

8. LEARNING AND DEVELOPMENT ACTIVITIES

8.1 As a general guideline, learning and development needs will be met through one or more of the following:

8.2 Learning and Development can be defined as any activity designed to help individuals become more effective at their work by improving, updating or refining their knowledge and skills. It encompasses a range of activities:

- Informal on-the-job training including coaching and shadowing
- Self-help groups such as specialist forums
- In-house courses, seminars and computer aided training packages
- Short external conferences and events such as those arranged by the SFHA, PAiH or CIH
- Correspondence courses leading to formal qualifications

- Day Release courses leading to formal qualifications, in exceptional circumstances where no correspondence course is available
- Involvement in various projects
- Visits to other organisations

8.3 The organisation is not currently in a position where it can release staff for training events which would involve continuous absence from work for long periods.

9. APPLICATIONS FOR ASSISTANCE FOR FORMAL QUALIFICATIONS

9.1 Applications should be made via the Line Manager and include full information on the qualification sought, the course of study, any practical requirements, tuition fees and any other expenses.

9.2 If approved, the Corporate Services Manager will make a written offer of assistance subject to such conditions as are deemed appropriate as soon as possible.

9.3 Applications for assistance must be made before the end of June in any year where the course of study commences at the beginning of the academic year, normally September / October.

9.4 The organisation will provide all, or some, of the following in relation to staff taking formal studies for a relevant qualification:

- Tuition and examination fees. Assistance with the cost of books and other study material as agreed by the Corporate Services Manager
- Paid leave in accordance with the attendance requirements of the course
- Paid leave to take examinations
- Paid leave for revision prior to final course examinations of two days
- Where the course of study is through the continuous assessment route, employees may be granted two days' study leave over the course
- Staff can request to take a full day or half day subject to approval by the appropriate Manager. This must be notified to the Corporate Services Manager for records.

9.5 The organisation will meet the cost of student membership of the relevant professional body where a member of staff is being assisted on a course of study leading to full membership of that professional body.

9.6 The organisation will reimburse travelling expenses for training events held outwith Edinburgh.

9.7 Members of staff receiving support from the organisation in relation to training under assistance for formal qualifications do so on the strict understanding

that assistance is conditional upon:

- Satisfactory attendance and performance on the course of study
- Holiday leave is taken in those periods which correspond to holidays at the institute providing the course
- In the event of not achieving a pass in examinations then any resit is at the employee's own expense and time
- The employee undertaking the normal weekly workload associated with his/her post

10. REIMBURSEMENT OF FEES FOR FORMAL QUALIFICATIONS

10.1 Where an employee leaves the organisation for whatever reason prior to completing the course, or within two years of completing the course they are liable to pay back costs as follows:

- Employee leaving prior to the completion of the course of study – 100% repaid
- Employee leaving within one year of completion of the course of study – 100% repaid
- Employee leaving between one and two years of completion – 50% repaid

10.2 On receipt of notice of termination of employment, deductions will be made from salary payments within the notice period. The outstanding course fees will be deducted from any final salary payment due or over a timescale as agreed with the Corporate Services Manager.

10.3 Where an employee is required to undertake a course of study which the organisation requires them to do to meet new legislative / regulatory requirements, the employee will not be required to refund course fees. Travel costs outwith Edinburgh will be reimbursed by the organisation.

11. PAYMENT OF PROFESSIONAL FEES

11.1 Where it is a requirement of the post or where an individual is a member of an institute or professional body that has some relevance to their job, the organisation will meet the cost of one professional fee or subscription per annum.

12. MONITORING AND EVALUATION

12.1 Managers are responsible for evaluating the effectiveness and value for money that any learning and development activity delivers.

12.2 To ensure that evaluation of training is carried out the Corporate Business Co-ordinator will send out relevant evaluation forms to the Line Manager a week before a training event and will ensure the form is completed and returned to

the Corporate Services Team within seven days of the training taking place.

12.3 The pre-course evaluation form should be completed before training is booked (Appendix I).

12.4 Learning and Development activities are evaluated to:

- Measure the impact of the activity on individual job performance and establish how new skills and knowledge can be used to help achieve departmental and organisational objectives.
- Evaluate the quality of provision and its value for money, to inform future usage of the training provider.

12.5 Training evaluation records will be kept by the Corporate Business Co-ordinator and incorporated into relevant HR reports.



Learning & Development Pre-Course Assessment Form

For completion by the employee and Line Manager prior to booking and returned to Corporate Business Co-ordinator

Name:	
Event:	
Provider:	
Cost:	
Date:	

Reason for attendance:

What will you learn by attending the event?	
Knowledge	Skills

How will this activity help you carry out your role better?

Employee Signature:	Line Manager Signature:
Date:	Date:



Learning & Development Evaluation Questionnaire

To be completed by the participant and Line Manager after the training activity and return to Corporate Business Co-ordinator within 7 days of completion of training

Name:	
Job Title:	
Activity/Course:	
Provider:	
Date:	

Please detail the course objectives and mark with an X the box which describes the extent you felt they were met.

Activity Objectives	Fully Met	Partly Met	Not Met
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Learning Record

Most Useful Points Learned		What have you learned on this course that you did not already know?	
1.		1.	
2.		2.	
3.		3.	

Do you think that what you learned will improve your effectiveness and results?

YES

NO

Please give an explanation of why you have given the response above:

General comments about this activity/course:

Employee Signature			Managers Signature:	
Date:			Date:	