



| Training & Development Policy | |
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| Prepared by | Clare Ruxton, Corporate Services Manager |
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GROUP TRAINING AND DEVELOPMENT POLICY STATEMENT

Osprey Group believes that effective, efficient staff and Governing Body training and development is vital to the provision of good quality services for all our tenants and to ensure value for money.

We embrace quality property management and this is encompassed in our
Core Values;

✓ **AMBITION**

empowering through innovation and challenge

✓ **(E)QUALITY**

doing the best for individuals and communities in a fair and equal way

✓ **RESPECT & PROFESSIONALISM**

*towards each other, the people we work with; the people we serve and
our environment*

✓ **ACHIEVEMENT**

*delivering outcomes that matter and make a real difference – now and in
the future*

1. Introduction

The Osprey Group is a dynamic and people-friendly organisation which strives to support the development of our employees and Governing Body members, as well as ensuring that such interventions are relevant and support the business. It is acknowledged that training and development will be both self driven by individuals and supported by the organisation to equip our people to fulfil their responsibilities and to ensure personal development.

2. Policy Aims

This policy aims to:

- Provide a framework for ensuring that the business as well as employees benefit from development activities undertaken.
- Ensure fairness, clarity and consistency for all staff and Governing Body members.
- Promote a culture of sharing knowledge and skills with work colleagues.
- Assist staff and Governing Body 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.

3. Policy Principles

This policy applies equally to **all** employees and Governing Body members of the Group. This policy seeks to outline how the Group will support the following aims and objectives:

- Resources for training and development should be allocated effectively to achieve business objectives
- All training and development provision should be planned, delivered and monitored on the basis of equality of access for all.
- Employees attending or undertaking approved training are entitled to payment of normal earnings, all prescribed fees and other relevant expenses arising.
- Employees attending or undertaking approved development are entitled to payment of normal earnings, a share of all prescribed fees and other relevant expenses arising (as per Expenses policy).

- Governing Body members attending or undertaking approved training are entitled to payment of prescribed fees and other relevant expenses arising (as per Expenses policy).
- Tenants attending or undertaking approved training and/or development are entitled to payment of prescribed fees and other relevant expenses arising (as per Expenses policy).
- Any training records must meet the Osprey's GDPR (General Data Protection Regulation) obligations.

4. Objectives

4.1 Definitions

- **Employee/Governing Body member development** is defined as developing the skills, knowledge and abilities employees needed to perform their current jobs effectively, develop their own potential and respond to future changes *for the purpose of* enabling all employees to contribute fully to the achievement of the Group's aims and objectives and the implementation of its aims and values.
- **Approved training** is defined as that which is **required** by the organisation and includes such things as Health and Safety, new policies and procedures, positive action to address inequalities in the workplace, professional development, management development and information technology.
- **Supported training** is defined as that which the organisation **is able** to support but is not essential for effective work performance and may include such things as courses in preparation for future career changes.

4.2 Responsibilities

Development and training is an activity that permeates the whole of the Group. Four areas of responsibility have been identified:

- Individual employee
- Managers
- Corporate Services team
- Chief Executive

4.2.1 Employees

It is the responsibility of each employee, in partnership with his or her manager, to:

- identify their development and training needs
- participate fully and positively in any development and training activity (including pre and post activity discussions) and
- monitor time and effort put into development and training with a view to getting the right balance between work and private life, which

should reduce incidences of stress, and enable adherence to the European Working Time Directive.

4.2.2 Managers

It is the responsibility of Managers to:

- Consider and attempt to meet the development and training needs of employees within available resources
- Discuss with each employee (prior to undertaking any development and training activity) the objectives of the activity, how the activity is expected to change their knowledge, skills, attitudes and/or behaviour and how these anticipated changes can improve the way things are done
- Discuss with the employee (after the employee undertakes development and training activity, or at regular intervals throughout an extended period of development and training activity) any new skills or knowledge acquired, and evaluate how these can be used for increased job performance or development purposes and any follow up action that is required
- Ensure the employee has considered their responsibility relating to any course that has the potential to impact upon their availability for work.
- Monitor time and effort put into employee development and training with a view to getting the right balance between work and private life, , which should reduce incidences of stress, and enable adherence to the European Working Time Directive.

4.2.3 The Corporate Services Team

The Team is responsible for:

- Preparing an annual development and training plan for inclusion in the budgeting process. This plan will take account of the Group objectives as well as individual needs as identified by the Performance Appraisal Scheme. This plan will provide information on key objectives, targets, priorities, resources and responsibilities.
- Ensuring the appropriate financial resources are made available for developing our employees. This amount will be set as relevant and appropriate given the Group's financial position.
- Working with managers to provide advice on development and training opportunities, financial opportunities/constraints and any policies or procedures particular to their teams.
- Overseeing the development and training delivery to ensure best value.
- Seeking and managing funding for development and training.
- Making recommendations to the management team about the level of funding requiring to be invested in employee development and training based on funding availability.

4.2.4 Chief Executive

- Receives a report on all training applications from the relevant Managers.
- Discretion to pay exam fees for subsequent sittings in exceptional circumstances.

5.Types of Development and Training

The Osprey Group will provide the following training/development opportunities:

5.1 Induction

This includes both new starts and people changing jobs within the Group.

Initial impressions are formed during the first weeks of employment therefore it is important to welcome staff appropriately. All employees will undertake an induction process that includes information about the Group, its role, location, culture, business objectives and job specific issues.

At local level, a checklist system is operated for all new starts. It is important that employees are aware of and accept mutual roles and responsibilities.

5.2 Job Related Competencies

To provide the best possible service to the Group's tenants and other service users it is essential that employees' competencies reflect the aims and values of the Group as well as the detailed knowledge of their own area of work (including compliance with statutory obligations for example Health and Safety and Data Protection).

5.3 Development Beyond the Current Job Function

Future employability or promotion prospects may be enhanced, where budgetary provision and service requirements permit, by preparing employees for tasks, duties and responsibilities which extend knowledge and skills which (though relevant to current post) will be required to be exercised to a greater extent in a future post.

Whilst acknowledging that jobs change over time and with agreement of staff as part of their development via the Performance Appraisal system, managers should be aware of their responsibilities in terms of monitoring the activities and tasks which employees become involved in to avoid jobs changing to the extent that re grading claims may be made particularly where it is unlikely that funding to support such a move is available.

6. Approaches to Development and Training

6.1 Methods

Development and training methods are varied and their use depends on circumstances, individual and organisational needs and finances. They may include the following:

- on the job coaching, mentoring and training;
- off the job training courses and seminars run in-house;
- off the job training courses and seminars run externally;
- access to learning resource centre materials;
- day, evening or block release courses at local colleges or universities;
- open and flexible learning programmes;
- web based and e-learning training;
- internally, or externally run competency based S.V.Q. programmes.

Managers must agree and authorise employees' participation/attendance at any such development activities prior to any event by completing the form in Appendix 1 and submitting it to the Corporate Services team. Support will normally be given, where this would allow personal development in accordance with operational directives unless this would result in operational difficulties.

6.2 Further Education Courses

Contribution from the Group will be as follows:-

- Up to 50% of the course fee paid for appropriate courses (such as those leading to technical or professional qualifications). The full amount will be paid up front and the balance deducted from the individuals salary over a maximum of 12 months
- Give paid time off for the first sitting of an exam and one day's study leave per half exam day. Exam fees will be paid for first sitting only. Financial support for re-sits will not normally be given though the Chief Executive will retain discretion in this matter.
- Give sympathetic consideration of requests for unpaid leave or annual leave where required
- Payment of up to £40 towards cost of coursework material
- Pay travel expenses for public transport for all courses attended outwith a 20-mile radius of the individual's home address. All receipts must be retained.

6.2.1 Guidelines for Applications Members of Staff

Financial assistance for external courses of study shall be at the discretion of the Chief Executive for all employees. The Chief Executive will receive a report on all applications from the relevant Manager.

Governing Body Members

Financial assistance for external courses of study shall be at the discretion of the relevant Governing Body. The Governing Body will receive a report on all applications from the Corporate Services Manager.

These applications will include the following information:

- Length of time in post, applications will not be considered unless the individual has worked for the Group for a minimum period of 12 months.
- Relevancy to current post.
- Benefit to the Group.
- Employee's attendance and disciplinary record and current appraisal
- Previous training provided from the Group.
- Confirmation from the line manager that the individual and the employer can benefit from the course being attended.

Approval will not be unreasonably withheld particularly where an employee in a similar post has already obtained support and approval from the Group, but may be subject to limitation through budget constraints

The line manager will monitor progress through the course. Where the course covers more than one year, the funding will only be available for the second year if the individual continues to show commitment both to the employer and to the course being undertaken.

6.2.2 Rules applicable to such funding are as follows:

1. The fees paid are to be regarded as a loan. The loan will be written off 12 months following the relevant course/examination or stage qualification. The Group will have a right to require the employee to refund the full or a proportion of the cost of fees (as outlined in the undertaking appended to this policy) where the employee voluntarily leaves their employment within those 12 months, or where the employee or the training institution prematurely terminates their course or where the employee is summarily dismissed from their employment.
2. Withdrawal from a course will result in repayment of the fees paid on the basis of the above, unless:
 - a. The employee, on presentation of written justification, has obtained the organisation's agreement to withdraw,
 - b. The employee has had to withdraw due to long-term sickness, maternity leave, or redundancy.
3. All training received will be recorded in an employee training record. A typical record will include information on the employee, the date(s) of

the activity, details of the activity, who provided the activity, the full cost of activity, qualification outcome (if any).

6.2.2 Sharing the Knowledge

It is acknowledged that there is a lot of specialised knowledge held amongst the Group's staff that could better benefit colleagues and the business were it to be shared. This policy aims to encourage colleagues to share their knowledge and skills with each other. Appendix 2 is a copy of the Feedback form all employees and Board Members are expected to complete following every training session.

Gaining diverse knowledge and skills from colleagues can also effectively help in enhancing other people's career prospects and employability.

Although all staff will be encouraged to attend the session run by their colleagues, such attendance will 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.

7. The Appraisal Process

In order to prompt a meaningful discussion between the staff member and their line manager as well as to help achieving the targets set by this policy, the targets for training and development activities have been incorporated into the Group's standard appraisal form. Appraisers and staff should work together in achieving this level of focussed development, all of which should be driven by the staff appraisal system, which in turn should heavily reflect business priorities.

8. Equality and Diversity

The Group is committed to ensuring and promoting diversity and equality of opportunity in housing, employment and provision of services for all people within its range of work. The Group will treat all people equally and in accordance with the Equality & Diversity Policy.

9. Monitoring and Reporting

The Management team are responsible for monitoring the use of the training budget and the Joint Corporate Services Committee are responsible for reviewing and analysing the outcomes at the end of each year.

9.1 Recording Training

All staff should keep the Corporate Services Officer informed of all training attended to ensure a record of the Group supported training/development throughout the year. The appraisal system can be used to identify training needs but managers can discuss individual needs at any time. This will also be used by the relevant appraiser in monitoring and approving requests for training throughout the course of the year. The Group employees are encouraged to discuss their development with their line managers regularly throughout the year, rather than leaving such discussions to the appraisal meetings only.

10. Review

This policy will be reviewed every 3 years unless the following criteria dictate that it would be best practise to review sooner:

- i. applicable legislation, rules, regulations and guidance, both those which affect the Group directly and those which affect the resources available to significant numbers of our customers to enable them to sustain tenancies.
- ii. changes in the organisation.
- iii. continued best practice.

Appendix 1
CONFERENCE/TRAINING REQUEST RECORD

| | | | | | |
|--|------|--------------------------|-----|--------------------------|--|
| Employee name: | | | | | |
| Conference/Training course title | | | | | |
| Conference/Training course/session run by: | | | | | |
| Date: | | | | | |
| Duration: | | | | | |
| Give details of accommodation to be booked (This must be booked in advance by the Corporate Services Team) | | | | | |
| Give details of travel arrangements to be booked (This must be booked in advance by the Corporate Services Team) | | | | | |
| Cost Breakdown (Including travel & accommodation): | | | | | |
| Certificate received (if applicable): | | | | | |
| Course programme attached: | Yes: | <input type="checkbox"/> | No: | <input type="checkbox"/> | |
| What is the course about? | | | | | |
| Why do you want to attend? | | | | | |
| What do you hope to learn/gain from attending? | | | | | |
| How will you share the learning outcomes with colleagues? | | | | | |
| Manager Approval | Date | | | | |

Appendix 2
CONFERENCE/TRAINING FEEDBACK

| | |
|--|---|
| Employee name: | |
| Conference/training course title: | |
| Conference/training course run by: | |
| How informative did you find the conference/training event? | 1. – Poor 2. – Fair 3. – Good 4. – Very good 5. – Excellent |
| Did the session meet your expectations? | |
| Have you gained any knowledge that should be shared with your colleagues at a training session? If yes, who? | |
| Do you think any other staff member would benefit from attending this course? If yes, who and why? | |

Employee/GBM Signature.....

Date.....

Please return completed form to sredford@ospreyhousing.org.uk.

| | |
|------------------------|--|
| Training session date: | |
| Attending: | |

How was good practice shared and key content/outcomes disseminated?

Key Learning Outcomes
