

**Knowsley Council**

**Employee Services**

**Developing People Policy**

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| Date formally approved: |  |
| Document Author: | Gwen Forkin |
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| **KMBC DOCUMENT CONTROL PAGE** | | |
| **TITLE** | **Title:**    **Publication Date:**  **Document Type:**    **Version Number:**  **Brief Summary:** | **Developing People Policy**  **ES Policy**  **3.0**  **ES Policy relating to learning and development in the workplace.** |
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| **POLICY DEPENDENCIES** | **Link to other Council documents:**  **Link to Council Primary Objective:**  **Link to Local Strategic Partnership Priority:** | |

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|  | **KMBC DOCUMENT CONTROL PAGE (2) Continued** |
| **EQUALITY IMPACT ASSESSMENT** | **In order to carry out an EIA you should first complete a screening matrix which can be accessed through Employee Services.**  **Screening Matrix Complete: Yes**  **No**  **Date Complete:**  **Manager/Group responsible:**  **Category: High**  **Medium**  **Low**  **No relevance**  **Based on the category indicate the date that a further assessment must take place:** |
| **Initial Assessment is complete: Yes**  **No**  **N/A**  **Date Complete: June 2016** |
| **Full EIA Process is complete: Yes**  **No**  **N/A**  **Date Complete:** |
| **SUSTAINABILITY**  **APPRAISAL** | **To evaluate the economic, social and environmental impacts of a policy you should complete the Integrated Sustainability Appraisal Toolkit on the Policy Hub**  **Policy has been appraised for sustainability: Yes** **No**  **Action has been taken to mitigate any identified negative impacts:**  **Yes**  **No**  **N/A**  **Date Complete:** |
| **RISK ASSESSMENT** | **A risk assessment template is available on the Corporate Risk Management intranet site.**  **Policy has been risk assessed: Yes** **No**  **Date complete:** |
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METROPOLITAN BOROUGH OF KNOWSLEY

EMPLOYEE SERVICES POLICIES, PROCEDURES AND PRACTICES

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| **SUBJECT**: Developing People Policy |
| **APPLICABLE** All Council Employees [except School based employees employed or  **TO:** managed by a Governing Body under LMS regulations]  **SOURCE:** |

# 1. Policy Statement

Knowsley MBC is committed to provide all employees regardless of employment status with fair and equal access to appropriate learning opportunities to enable them to fully contribute to the overall success of the Council.

In line with the Part-time Workers (Prevention of Less Favourable Treatment) Regulations 2000 (Amendment) Regulations 2002 and Fixed Term Employees (Prevention of Less Favourable Treatment) Regulations 2002, part time and fixed term employees should be given the same rights as permanent full time employees in relation to access to learning and development activities. Denying part-time or fixed term employees access to learning and development activities may be classed as less favourable treatment.

We will plan, develop and evaluate all learning and development activity in order to meet the needs of the Council.

# 2. Purpose

The purpose of this policy document is to outline the Council’s commitment to the development of our workforce. We will specify the responsibilities of all parties involved in the development of employees and the organisation.

**Definition of Learning and Development**

Those activities designed to change attitudes or provide knowledge and skills required by the Council to meet its vision, and priorities. Learning and development may relate to skills or knowledge required to perform current responsibilities, or the acquisition of new knowledge or skills necessary for the achievement of planned objectives. Further, learning and development can be used to change behaviour which enables employees to help create a culture that brings about positive and sustainable change.

# 3. Responsibilities

## 3.1 Senior Manager

Senior management must undertake systematic workforce planning in order to meet the current and future workforce and training requirements. They must ensure that resources are made available so that the organisation is fit for purpose both now and in the future and should champion learning and development at all levels of the organisation.

## 3.2 Line manager

Line managers must ensure that the employees who report to them have the knowledge, skills and behaviours required to fulfil their roles both now and in the future. Managers must also be aware of the employee’s ‘right to request time off for training’ under section 63D of the Employment Rights Act 1996 which came into effect in April 2010. As part of the Performance Review and Development (PR&D) process managers will need to consider such requests that they receive and respond accordingly and in a timely manner.

## 3.3 Employees

Employees must take responsibility for their own learning and development. They should seek out both formal and informal development opportunities and support others to develop their skills whenever possible. Employees with specific needs should notify Employee Services of their requirements. Employees who have worked for the Council for 26 weeks will have the ‘right to request time off work for training’ under section 63D Employment Rights Act 1996 which came into effect in April 2010.

Employees are expected to co-operate with reasonable expectations around learning and development activities. These include:

* Attending the required number of tutorial/support sessions;
* Completing and delivering assignments or project work on time and to the required standard;
* Demonstrating satisfactory progress in all studies;
* Fully preparing for all tests/examinations, including the production of all necessary personal documentation which may be required for the test / examination;
* Sitting and successfully completing the examination(s) necessary for the any qualifications (within a reasonable time period)

## 3.4 Union Learning Representative

Union Learning Representative’s will work with the Council to promote learning opportunities, support and help employees overcome any barriers to learning and encourage employees to identify their learning needs. The Council and the Joint trade unions and professional associations have signed a Learning Agreement that promotes skills for life.

Union Learning Representatives will be given reasonable time off to undertake their role in accordance with The ACAS Time Off for Trade Union Activities.

Further guidance on Time off for Trade Union Activities can be found in the [Time off Work policy on BERTHA.](http://bertha.knowsley.gov.uk/Staff_Stuff/Your_job/HRPolicies/Pages/Time-Off-Work.aspx)

## 3.5 People who procure training

The officer who procures training must ensure that any investment represents value for Knowsley and is properly evaluated. We must ensure that the best use is made of resources available for training and that overall learning and development is undertaken in a planned and managed way.

When procuring training we will ensure that flexible start and finish times are available to employees and that we check the availability for wheelchair access and any specific needs of delegates.

# 4. DEVELOPING PEOPLE

## 4.1 Planning Learning and development

Learning and development must be planned as part of a workforce planning activity in order to maximise the impact of the activity and demonstrate value for money.

The identification and planning of training needs and how to address these needs is the joint responsibility of individual employees and managers through the Performance and Development Review (PR&D) process. The agreed PR&D is the record for all recommended training and support and it also states the preferred method(s) to meet identified needs. The allocation of protected time will be dependent on the training and support identified through the PR&D process, the methods chosen and the needs of the service.

For guidance on the PR&D process see the [PR&D section on Bertha.](http://bertha.knowsley.gov.uk/Staff_Stuff/Your_job/Performance_review_development/Pages/default.aspx)

## 4.2 Identifying needs – what Training and Support is required

Line managers and the employees who report to them will agree training and support required as part of an annual Performance Review and Development discussion. The discussion should reflect the needs within the service plan and objectives of the team and the individual. Appendix 1 provides further information on prioritising learning and development.

## 4.3 Design and Delivery of Training and Support

Formal and informal methods of acquiring skills, knowledge and competence will be treated equally. For example, this may include formal workshops, qualifications, coaching, e-learning and mentoring.

In addition, managers should discuss and plan with employees the appropriate timing for training and development and how the employee will consolidate their learning by utilising it in practice within a reasonable period of time. This will ensure that new skills or knowledge are not lost or forgotten. This is essential to ensure we make best use of the investment which has been made in the development activity and that training does not have to be needlessly repeated.

## 4.4 Recording of Training and Support Activity

All learning and development should be recorded on an employee’s PR&D. In the near future Employee Services will introduce the facility for managers and employees to complete and submit their PR&D Priority Actions and Training and Support requirements online through the council’s self-service portal “My View”.

The first phase of this project will be piloted in 2016 before it is rolled out across the Council.

## 4.5 Evaluating the Value of Training and Support Activity

Training and support activity must be evaluated in order to maximise the impact of the learning and demonstrate value for Knowsley. Employees and managers are expected to provide feedback when requested to support the evaluation process.

## 4.6 Skills for Life

Development to support numeracy and literacy will be prioritised according to Performance Review and Development discussions. The Council will support the attainment of appropriate level two qualifications.

## 4.7 Equality and Diversity

Knowsley Council aims to promote a culture where learning and development is promoted and supported to enable all employees regardless of Age, Disability, Gender reassignment, Marriage and Civil Partnership, Pregnancy and Maternity, Race (including gypsies and travellers), Religion and belief, Sex (Gender), Sexual Orientation, Carer’s Status, grade or post to realise their full potential both at work and in the community.

Knowsley Council and partners recognise the importance of equal opportunities and equal access to learning and the need to take positive steps to make reasonable adjustments to meet the learning and development needs of employees.

Employees with specific needs should notify Employee Services of their requirements. Dependant on the requirement, the employee may be advised to contact [‘Access to Work’](http://bertha.knowsley.gov.uk/Staff_Stuff/Your_job/HRPolicies/Pages/eAccesstoWorkScheme.aspx). Employees who have worked for the Council for 26 weeks will have the ‘right to request time off work for training’ under section 63D Employment Rights Act 1996 which came into effect in April 2010.

The Council is committed to providing appropriate learning and development programmes to ensure that employees are aware of current equality and diversity issues and their responsibilities. There is also a process in place to ensure that there is continuous review and evaluation of other learning and development programmes to ensure that equality and diversity issues are incorporated and considered during training activities.

## 4.8 Protected Learning Time

Traditionally, learning has been delivered through formal methods such as workshops, courses, events and briefings. However, increasingly alternative methods such as on the job learning and e-learning are being promoted and used across the workforce.

Employees will be given reasonable time off to undertake development which relates to their current role or to develop them for a future role in line with planned talent management protocols. These arrangements must take the needs of the service into consideration and be mutually agreed as part of the Performance Review and Development discussion.

To ensure that learning time is protected and properly managed, specific periods should be identified when the employee will be free from normal work commitments to enable the learning to be undertaken.

It is not acceptable to expect employees to accommodate alternative methods of learning into spare moments during their working days in an unstructured manner. If the learning is considered important then dedicated time needs to be allocated which permits the learner to make best use of the learning material and properly assimilate the required knowledge.

The learner and their manager should detail times and locations when it can reasonably be expected that the learning will take place. An employee can be permitted to learn from a location outside the organisations premises i.e. library, home, or another working location.

Managers will be required to consider any particular individual needs that a learner may have and take steps to address them. For instance it may be necessary to allocate additional time over and above the recommended protected learning time.

## 4.9 Training Expenses

Employees can claim for additional expenses which are incurred in attending a training course, providing that the employee has a satisfactory attendance record and can demonstrate reasonable progress. The National Joint Council Subsistence Allowances [are available on Bertha](http://bertha.knowsley.gov.uk/Staff_Stuff/Your_job/Pages/MyView.aspx).

It is the responsibility of the individual employee to pay all professional membership or subscription fees that are required to be a member of a professional body or retain certificates of fitness to practice.

## 4.10 Study Leave and Examination Leave

Paid examination/test/assessment leave is given in accordance with National Conditions of Service, plus study leave up to a maximum of one half day [3.6 hours for those working a 36 hour week] with pay for each academic subject. Employees studying assignment based courses, where no examination is taken, will be entitled instead, to take up to 3.6 hours [as above] leave per academic subject. This is to be taken by agreement with their line manager, as required during the learning period. Paid examination and study leave is granted for the first examination/test/assessment attempt only.

## 4.11 Attending training away from normal work base

Travelling **-** Adjustment information for the time spent out of the office should include travelling time between the office and place of business, except for employees presently required as a normal part of their duties to work at varying locations within the Borough, and who do not receive payment or allowance for travelling time at the beginning and/or end of the working day.  Any travel time to and from a full day’s meeting should be agreed with your line manager prior to attendance.

For more information on how to calculate and record your training and whether or not you are entitled to claim travelling time please refer to the [Flexible and Mobile Working Policy](http://bertha.knowsley.gov.uk/Staff_Stuff/Your_job/HRPolicies/Pages/eFlexibleMobileWorkingPolicy.aspx), appendix 5 flexible working hours scheme section 4.2.

## 4.12 Investment in Learning Agreement

Employees are encouraged to undertake qualifications or other training to support the business needs of the Council and financial assistance may be given.

Prior to commencement, all employees undertaking training which costs more than £500 must apply to their Head of Service for approval. Employees must complete an Investment in Learning Agreement (Financial Scheme) whereby they agree to pay back relevant fees should they leave the authority within two years of completing their qualification or course of study.

Applications are to be considered in the following order:

* Employees who have already embarked on a course of Further or Higher Education and are part way through a qualification [bearing in mind their progress and attendance on the previous stage];
* Trainees, apprentices and graduates; and
* Other new applicants.

If approval is granted, then the employee should notify the Workforce Development Team who will administer the necessary documentation.

Employees who fail to sit the examination or fail to show satisfactory progress in their studies, or discontinue their course or leave the service of the Council during the period of the course or who fail to remain for two years after qualification then the Council will withdraw their support under the Scheme and may require the employee to refund the whole, or such proportion of the financial assistance granted as the Council may determine.

In these circumstance the amount owing will be shown on the termination form deduction from the final salary made.

Any extenuating circumstances for employees should be reported to the Director or Nominated Officer for consideration on individual merit.

Apprentices and trainees are exempt from the requirement to repay expenses for their basic qualification training.

Employees leaving to take up appointments with another local authority are also exempt from repayment.

Employees on fixed term contracts who apply to undertake a qualification programme relevant to their role are required to sign a two year agreement in accordance with this policy. However consideration will be given to individuals on fixed term contracts who are unable to complete two years service (after completion of a qualification) because their employment has been terminated by the Council.

For details of the KMBC Two Year Agreement Investment in Learning Agreement (Financial Scheme) see Appendix 2.

## 4.13 Impact on Learning Agreement (Return on Investment)

Employees attending training that costs over £500 and certain other nominated training will be required to complete an Impact on Learning Agreement detailing the return on investment for the Council. The form details what is expected from the learner both during and after the completion of the learning.

For details of the KMBC Impact on Learning Agreement (Return on Investment)

see Appendix 3.

## 4.14 Incremental Advances

Knowsley operates a progression policy for all qualified, registered Social Workers. Details of this policy can be found via this BETHA link: [Qualified Social Workers Progression Policy](http://bertha.knowsley.gov.uk/Staff_Stuff/Your_job/Performance_review_development/Documents/progression-policy-march-2016.docx)

## 4.15 Cancellation Procedure

We fully recognise that there are times when individuals need to change or cancel training arrangements due to service changes and business needs. However, to ensure that we continue to be able to offer a quality training provision and a valuable experience for other delegates, we encourage as much as possible for delegates to honour their commitment that they (and their managers) have given to their development. The Cancellation Procedure gives guidance on the expectations around non-attendance and cancellation of places on courses. Please see Appendix 4 and note that the procedure applies to ALL courses.

# 5.0 Right to appeal

There is no specific appeals mechanism relating to this policy.  Where any dispute cannot be resolved locally, appeals in relation to learning and development will be heard using the [Council’s Grievance Procedure](http://bertha.knowsley.gov.uk/Staff_Stuff/Your_job/HRPolicies/Pages/eManagingConductPolicy.aspx).

# 6.0 APPENDICES

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| --- | --- | --- |
| **No.** | **Page**  **No.** | **Title:** |
| **1** | 13 | Prioritising learning and development |
| **2** | 15 | KMBC Two Year Investment in Learning Agreement (Financial Scheme) |
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| **4** | 17 | Cancellation Procedure |

**Appendix 1**

**PRIORITISING LEARNING AND DEVELOPMENT**

**Prioritising access to individual development opportunities**

At a Performance Review and Development discussion, one to one meeting, informal catch up or target setting discussion or supervision meeting, training and support needs will be identified:

* Where action can be taken by the employee and/or manager (e.g. workplace shadowing and coaching); and
* Where resources would need to be allocated in order to access internal or external qualification or development programmes.

All training and support needs have resource implications in terms of:

* employee time, release from duties for development activities;
* employee release sometimes requiring back-fill arrangements and costs;
* training and qualification costs (whether external or internal); and
* Expenses (e.g. travel).

Prioritising training and support is therefore essential to ensure efficient and effective use of resources. The following is proposed as a prioritisation model to guide managers.

|  |  |  |
| --- | --- | --- |
| **Level** | **Type** | **Priority** |
| 1 | Induction and maintenance development, statutory and regulatory compliance. | Highest Priority  Must be considered |
| 2 | Developments and qualification programmes to meet Service Performance Priorities. | High Priority  Should be considered |
| 3 | Development of individual’s skills and knowledge beyond what is required for current role. | Medium Priority  Could be considered |

1. **Induction and maintenance development, statutory and regulatory compliance.**

* Any development activity (including induction and Skills for Life activity) which is needed by the employee in order to undertake their duties competently and safely; and to meet statutory and regulatory requirements including health and safety.
* Development to enable employees to comply with changes to statutory and regulatory requirements affecting their role;
* Developments associated with high levels of risk;
* Developments to meet grant criteria for funded developments;
* Qualifications to meet regulatory requirements where these apply; and
* Development to meet individual registration requirements for continuous professional development (CPD) for statutory roles.

1. **Developments and qualification programmes to meet Service Performance Priorities.**

* Development to enable employees to work to new corporate or Service priorities;
* Qualification programmes where a qualification is an essential requirement for the job role;
* Development to enable services to contribute to strategic outcomes, improvement and performance indicators;
* Development to support service change, modernisation and related workforce planning where services require new or different skills/knowledge; and
* Developments associated with moderate levels of risk.

1. **Development of individual’s skills and knowledge beyond what is required for current role.**

* To support longer term workforce planning, develop staff to meet identified projected skill shortages;
* Qualification programmes where a qualification is a desirable requirement but not essential for the job role; and
* Development of skills unrelated to current role, to build confidence and skills to facilitate career progression and progress in the organisation.

**Appendix 2**

KNOWSLEY COUNCIL

TWO YEAR INVESTMENT IN LEARNING AGREEMENT (FINANCIAL SCHEME)

NAME\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ GRADE\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

POST \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_SERVICE AREA \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

I understand that if the Council grants me financial assistance (‘the Scheme’), within its policy for financial support for completing the below training, course or examination:

Full Title of Course or Qualification: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

On this basis I AGREE that:

1. I will remain employed by the Council for at least two years following the date on which the qualification or training is obtained. If I do not remain in employment with the Council\* I may be asked to repay the Council the whole, or such proportion determined by the Council, of the amount paid to me, or on my behalf, under the Scheme. If I leave the Council’s employment to take up a post with another local authority, or due to properly certificated ill health, no money shall be repayable under this Agreement.
2. In addition, if I fail to comply with the requirements detailed below during the period of my training, then the Council may withdraw or require me to repay such proportion of the financial assistance granted under the Scheme as they may determine appropriate. I accept that this includes any sum equivalent to that which may have been provided by external funding and which is lost due to my failure to comply with the requirements detailed below. The requirements (where applicable) include:
   1. Attending the required number of tutorial/support sessions;
   2. Completing and delivering assignments or project work on time;
   3. Demonstrating satisfactory progress in my studies;
   4. Fully preparing for all tests/examinations, including the production of all necessary personal documentation on the day of the test / examination;
   5. Sitting and successfully completing the examination(s) necessary for the above qualification (within a reasonable time period), and;
   6. Remaining employed the Council (as explained in paragraph 1 above).
3. If I am dismissed from the Council’s service within two years following the date on which I obtain the qualification, for which financial assistance has been provided, the Council is entitled to recover the whole or such proportion of the financial assistance so provided, as the Council may determine appropriate.
4. I agree that any such sums which become due as a result of the circumstances described above, they may be deducted from my final salary payment from Knowsley Council. Additionally, if all or part of such sum remains unpaid following the termination of my employment, I agree that such sum will remain payable by me and that the Council may seek to recover it from me as a sundry debtor.

SIGNED (Learner) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_DATE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\*Consideration will be given to individuals on a fixed term contract who are unable to complete the two years’ post qualifying period due to their contractual terms and to apprentices/trainees who require this qualification as part of their apprenticeship contract. However, each case will be dealt with on an individual basis and the exercise of any discretion by the Council will depend upon an employee’s own particular circumstances.

Appendix 3

IMPACT ON LEARNING AGREEMENT

(ONGOING EXPECTATIONS AND RETURN ON INVESTMENT)

|  |  |  |
| --- | --- | --- |
| **Learner Name:** | **Contact No:** | |
| **Qualification:** | **Start date:** | |
| **Specific Expectations of Learner (post training):** | | |
| **For Example:**   * I will ensure that HR and my manager receive copies of my certificate/licence * I will share my learning with colleagues to cascade my knowledge * I will deliver xx number of “train the trainer” sessions per calendar year * I will deliver xx number of training days per calendar year | | |
|  | | |
| **Manager Name:** | **Contact No:** | |
| **Specific Expectations of Manager (during training and post training):** | | |
| * Provide an appropriate level of workplace support to the learner during their study – this may include opportunities to develop and broaden experience, skills and work-based networks; * Provide release time to enable the learner to attend off-the-job study sessions (in line with the requirements of the qualification); * Provide study time (in line with the Council’s Developing People Policy) for the learner to undertake assignments or project work to support this qualification; and * Provide appropriate pastoral support to the learner if required. | | |
|  | | |
| **Training Provider:** | **Contact No:** | |
| **Specific Expectations of Training Provider (during training and built into the commissioning stage):** | | |
| * Provide underpinning knowledge and support to facilitate satisfactory progress; * Undertake appropriate progress monitoring and feedback to learners; and * Communicate clearly with learners, workforce development and line managers (where appropriate). | | |
| **Signed & Dated (Manager):** | |  |
| **Signed & Dated (Learner):** | |  |
| **Checked & Accepted (Workforce Development):** | |  |

**Appendix 4**

**Cancellation Procedure**

We fully recognise that there are times when individuals need to change or cancel training arrangements due to service changes and business needs. However, to ensure that we continue to be able to offer a quality training provision and a valuable experience for other delegates, we encourage as much as possible for delegates to honour their commitment that they (and their managers) have given to their development. Please note the following information applies to ALL courses.

* All requests for cancellations and/or transfers must be received by email to the [Workforce Development Team](mailto:workforce.developmentteam@knowsley.gov.uk);
* Any notified changes will become effective on the date of written confirmation being received; and
* The appropriate cancellation charge will be applied to your **service budget** as shown below.

|  |  |  |
| --- | --- | --- |
| **Required calendar days notice of cancellation before the course start date:** | **Course Duration:** | **Failure to meet will incur a charge to your service (per delegate) of:** |
| 15 days and over | For courses lasting 2 days and over  For courses lasting ½ day to 2 days | No charge  No charge |
| 1 – 14 days | For courses lasting 2 days and over  For courses lasting 1 day  For courses lasting ½ day | £160  £80  £40 |
| Failure to give any notice/failure to turn up on the day | For courses lasting 2 days and over  For courses lasting 1 day  For courses lasting ½ day | £240  £120  £60 |

In the event of the nominated individual not being able to attend, we will accept a substitution of another delegate on the condition that written notification is received (clearly outlining which delegate they are replacing). The manager of the delegate being replaced should inform the [Workforce Development Team](mailto:workforce.developmentteam@knowsley.gov.uk) of this change as early as possible prior to the course start date. If no notification of a substitute is received the service will be charged as outlined above.

Your co-operation on this matter is greatly appreciated.