

Scotmid

The logo for Scotmid, featuring the word "Scotmid" in a dark blue, sans-serif font, and the word "coop" in a light blue, stylized font below it. The "coop" is written in a lowercase, rounded font with a slight shadow effect.

LEARNING & DEVELOPMENT POLICY

Policy Number 28
July 2015

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Our continued success and competitiveness depends on the quality of our employees.

It is our policy to equip all employees with the necessary knowledge, skills and experience to do their job effectively, and meet business and individual objectives.

We also aim to achieve a positive, forward-looking working environment where employees are encouraged to continuously improve their skills so that they may improve their performance or prepare for future career progression and responsibilities as the business develops.

To the best of our ability:

- We will provide opportunities, facilities and financial support, to ensure that all staff possess the knowledge, skills and abilities necessary for them to achieve job related individual, team and Society objectives.
- We will ensure that learning and development is clearly defined within the Business Plan in assisting the Society to meet its objectives and is fully supported by the Senior Management Team.
- Job related learning and development will be made available to all staff irrespective of hours worked and job undertaken and irrespective of ethnic origin, gender, sexual orientation, age, religious affiliation, marital status, being pregnant or disability.
- The Learning and Development Policy will be kept under continuous review to ensure it remains relevant to the Society's mission and objectives.
- Learning & Development plans detailing specific job related training needs will be reviewed regularly at individual performance reviews, but will be flexible in responding to changing priorities and business needs.
- We will be flexible and open-minded in our approach to meeting learning and development needs, ensuring that the chosen action is most suitable and effective in terms of achieving the desired results.

Review & Evaluation

We will continuously evaluate learning and development activities to assess the benefits derived from this investment and to recommend actions to improve future effectiveness.

Regular evaluation will enable us to consider the benefits derived and allow us to determine the impact on individual, team and business performance.

Identified Learning & Development

Personal development plans (PDP's) will be used to record identified individual learning and development needs at Performance Management Reviews (PMR).

Overview of Training Provided and Supported

Induction and Basic Skills Training

Induction and basic skills training will be delivered to all employees from their date of start until fully proficient in all aspects of their job.

Mandatory Training

Regular mandatory training programmes will be provided for new employees, as applicable for their job.

Regular refresher/update programmes will also be run, to keep the standards at the required level across the business and to ensure the Society has sufficient numbers of informed and trained staff.

Job Related Structured Training Courses

Training through attendance on structured internal or external courses.

There must be sound evidence to show that sufficient thought has been given to what the need is, how the training course will contribute towards objectives/performance improvement, what the desired outcomes are and how the learning will be applied in the workplace. Employees will need to discuss their requirements with their line manager and People & Performance Consultant.

For external courses that are deemed beneficial for the employee to carry out their role the Society will support the employee where applicable by:

- Paying for 100% of course fees
- Allowing for time off during normal working hours to attend
- Reimburse for any additional travel costs incurred to and from training venue.

Conferences & Seminars

Whilst generally relatively low in cost it is still extremely important to ensure that there are sound business reasons for attending a conference/seminar. In most cases there is no need for more than one individual to attend the same event. Individuals who attend conferences/seminars are expected to disseminate the information/knowledge gained with colleagues utilising team meetings.

Learning From Others

Learning happens as much through transfer of knowledge/experiences as it does through imported learning. A key objective for the Society is to share knowledge, information and 'best practice' widely. Far better use can be made of the knowledge, skills and ideas employees already possess. Everyone shares responsibility for identifying good practice and taking steps to spread it and to learn from role models and the experience of people within the Society.

Further Education & Professional Qualifications

Employees will be encouraged to pursue further education/professional qualifications where it is considered and agreed that these will assist in fulfilling their job role within the Society. There must be sound evidence to show that sufficient thought has been given to what the need is, how the training course will contribute towards objectives/performance improvement, what the desired outcomes are and how the learning will be applied in the workplace.

Employees will need to discuss their requirements with their line manager and People & Performance Consultant.

Where the qualification is clearly relevant and required in the individual's current job role, the Society will support the employee by:

- Paying for 100% of course fees
- Allowing for time off during normal working hours to attend
- Reimburse for any *additional* travel costs incurred to and from venue
- A contribution, per academic year, towards the cost of specified textbooks
- Up to 4 days per academic year for exam and revision leave (pro rata entitlement for part-time staff) - All requests for study leave must be made by completing a study leave request form, available from the People & Performance Department, which must be authorised by the individual's line manager. Any further study time will be taken as annual leave or un-paid leave.
- The Society will pay for one exam sitting. If re-sits are required this will be at the individuals own cost.

Professional Memberships & Subscriptions

Financial assistance will be given to supporting membership of a relevant professional body and for annual professional subscription if applicable to an individual's job role.

Authorisation and Responsibility for Learning & Development

Authorisation

Attendance at in-house training will be authorised by the employee's line manager

Attendance at external training will be authorised by the employee's line manager in consultation with the People & Performance Department

Line management sponsorship may be required for entry onto some specified advanced programmes

Responsibility

Learning and development is the responsibility of line management. The People & Performance Department in consultation with Heads of Departments will review training plans on a six monthly basis. Training plans will be formulated based upon TNA, PDP's, Society and departmental strategic plans and objectives, succession plan requirements and individual development needs.

Employees have ownership of their own development. Utilising performance management reviews and coaching, the employee's line manager (and where appropriate a member of the People & Performance Team), will identify and plan individual training needs with the employee. These should be reviewed with the employee on a regular basis and clearly recorded on personal development plans

The People & Performance Department will undertake to advise nominated employees of training dates, times and venues at least 4 weeks in advance of the programme.

Before attending training, the line manager must ensure that the employee is aware of:

- The learning objectives of the course
- The date, time and venue and any particular requirements (dress code, overnights etc)
- How attendance at the course supports personal development
- Any pre-work or related work experience options
- Any conditions which may apply for participants (travel, expenses, time-off etc.)

Mentor support may be allocated to employees undertaking specialist areas of training, or while undertaking programmes leading to possible promotion.

After an employee attends a course, the immediate line manager must discuss :

- The extent to which the personal and business objectives of the course have been achieved
- How the course learning outcomes will be applied in the work situation and how this will be measured

- Any follow-up work/projects/action to support the learning outcomes
- Review and evaluation of effectiveness

Financial Assistance

Essential courses

Where an employee is required by the Society to attend a course or programme of study or the course is mandatory, all course fees, travel, accommodation and subsistence costs will be met by the Society. Travel and accommodation bookings must be made through the Society's authorised process.

The employee may in some instances be required to make the accommodation bill payment at the time, to be fully reimbursed upon production of receipts.

In all instances, additional costs (bar bills, newspapers, phone bills etc) must be met by the individual.

Professional Qualifications & Vocational Training

Where the Society requires, or has approved study towards a professional or vocational qualification relevant to the employee's current (or anticipated future) job role, or which support continuous professional development, all study fees, exam fees, linked workshop fees will be met. This will include any accommodation costs linked to attendance at venues too distant from the employee's home address.

Where regular day/part release has been requested and is approved, the cost of travel to and from the external venue will be the responsibility of the employee.

Potential total costs for a given year must be identified and confirmed by the employee's line manager and passed to the People & Performance Department before the end of September each year, to ensure budget provision can be made. If no budget provision has been agreed, full reimbursement of costs cannot be guaranteed.

Non-essential Courses

Where employees request to attend courses or programmes of study not directly linked to their job role, or which may be a low priority for the Society, applications will be considered on a case-for-case basis with reference to the Right to Request Time Off For Training Policy. The employee's line manager will be required to support the application.

Where funding may be available from the Society, it will not exceed 50% of the total cost of the programme, course, exam fees etc. The employee will be required to make full payment for any study materials, membership subscription, travel, accommodation costs and attend any additional support workshops etc within their own time.

If, as a result of promotion or re-organisation, the programme becomes essential for the employee, the Society will meet the full costs as detailed within 'Essential Courses' section (above). This will apply if the promotion or reorganisation takes place while the course or programme is being undertaken or within 3 months of successful completion.

Training Agreement & Reclamation of Fees

A training agreement will be applicable where an employee is being financially supported by the Society and must be completed and authorised by the employee's line manager and the People & Performance Department **before formally signing up for training**.

Reclamation of fees etc, as detailed below:

Lack of Progress

Where it is identified that an employee has made insufficient progress on a professional or approved non-essential course due to irregular attendance, lack of application, and no extenuating circumstances exist, the Society will reclaim all course and exam fees.

If an employee withdraws from a professional or approved non-essential course or fails to sit an exam without the approval of their line manager and the People & Performance Department, the Society will reclaim all course and exam fees.

Exams

Where an employee who has attended a mandatory or professional course fails an exam, they will be expected to re-sit at the earliest available opportunity. Unless extenuating circumstances exist, the Society will meet the cost of only one re-sit for the entire duration of the course. Any further re-sit costs will be met by the employee.

If the employee is required to repeat all or part of a mandatory or professional course, the Society will not necessarily meet the additional course or exam costs. Circumstances of each individual case will be reviewed by the People & Performance Department with the employee and their line manager to determine if the Society will be prepared to meet these additional costs.

Where an employee fails a re-sit exam having repeated the mandatory or professional course, the Society will not provide any further financial support or time off work for the remainder of the course or any similar course. If the employee is successful in the re-sit exam, normal resumption of training facilities will be available. If the employee subsequently fails at any further stage of the course, no assistance will be provided with time-off or costs.

The Society will not meet any additional costs for the repeat of non-essential courses or re-sit exams.

Termination of Employment

If an employee is dismissed (other than for redundancy) while a professional or approved non-essential course is being undertaken, or within 2 years of completion of the programme, the Society will seek 100% reimbursement of course and exam fees. If the dismissal takes place within 3 years of completion, the Society will reclaim up to 50% of all course and exam fees.

Where the employee resigns (other than for reasons of ill-health, where this is verified by the Society's Occupational Health Adviser) during or within 1 year of the completion of a professional or approved non-essential course, the Society will reclaim 100% of all course and exam fees.

If the resignation takes place within 2 years of completion, the Society will seek to reclaim up to 50% of all course and exam fees.

In the event of redundancy or verified ill-health resignation, the employee will not be required to repay any course or exam fees.

Records

All learning and development must be recorded on the records held within each business unit. This is the responsibility of line management. These should be kept up to date and readily available for inspection by both internal departments and external official bodies. Individual training records should transfer with an employee when they change job roles, business units etc.

Details of training completed must also be forwarded by line managers to the People & Performance Department for central records. These details will be held in a computer system and will be processed by management for TNA purposes, evaluation and measurement of training levels provided, budget monitoring, evidence of business unit and individual progress, succession planning purposes and benchmark monitoring.

Workbooks, training diaries, programmes, checklists, evaluation forms etc remain the property of the Society and, if provided in hard copy, must be readily accessible by the employee but must be retained within the business unit for monitoring of progress by line management and the People & Performance Department. Where material is interactive or submitted via the Intranet site, the People & Performance Department will monitor timescales and standards of completion.

Employees who have attended in-house or external training programmes will be asked to complete course evaluation forms which will be analysed by the People & Performance Department to ensure quality control, cost effectiveness and ongoing development of programmes.

Policy Review

The Policy and Procedure may be amended at any time.

Training Agreement

I have read the Learning & Development Policy and understand that should I withdraw from the course, or if I voluntarily leave my employment or I am dismissed from the Society within the timescales outlined, I will be required to pay back course fees at the percentage as detailed below;

Withdrawal from Course

If an employee withdraws from a professional or approved non-essential course or fails to sit an exam without the approval of their line manager and the People & Performance Department, the Society will reclaim all course and exam fees.

Termination of Employment

If an employee is dismissed (other than for redundancy) while a professional or approved non-essential course is being undertaken, or within 2 years of completion of the programme, the Society will seek 100% reimbursement of course and exam fees. If the dismissal takes place within 3 years of completion, the Society will reclaim up to 50% of all course and exam fees.

Where the employee resigns (other than for reasons of ill-health, where this is verified by the Society's Occupational Health Adviser)) during or within 1 year of the completion of a professional or approved non-essential course, the Society will reclaim 100% of all course and exam fees.

If the resignation takes place within 2 years of completion, the Society will seek to reclaim up to 50% of all course and exam fees.

Employee Name:	Department/Store:
Course Provider:	Course Name:
Managers Signature:	Date:
Employees Signature:	Date:
Total Cost of Course:	People & Performance Authorised Expenditure:

Note to Management:

This form must be authorised by the People & Performance Department before confirming acceptance of training course/programme.