



Learning and Development Policy

Approval date: October 2020
Review date: October 2023

This policy applies to

- Link Group Link Housing Link Living Link Property
 Horizon Larkfield West Highland Lintel Trust

Policy Summary

Link's Learning & Development Policy is non-contractual as amended from time to time. It provides clarity to all employees on Link's approach and method to implementing learning and development across the business. The policy is designed to ensure that the implementation of all learning and development is wholly integrated with the vision, values and beliefs of Link. This policy should be read in conjunction with the Professional Memberships & Subscriptions Policy and partner Business Travel & Expenses Policy.

Equalities

The operation of this policy will be in accordance with Link Group's Policy on Equality, Diversity and Inclusion. Link learning and development services are designed and supported to be inclusive with a range of reasonable adjustments available for learners as needed.

Privacy

As part of this policy, Link may process personal data collected in accordance with its data protection policy. Data collected is held securely and accessed by, and disclosed to, individuals only for the purposes of managing learning activities, monitoring and reporting. Inappropriate access or disclosure of employee data constitutes a data breach and should be reported in accordance with Link's data protection policy immediately.

Policy Owner
Head of Human Resources

Review Manager
L&D Business Partner

Approved By
Senior Management Group
(SMG)

1 Introduction

- 1.1 Link is committed to the learning and development of all employees. Link recognises the important contribution of employee development in the creation of a highly skilled and motivated workforce, which is essential for the effective delivery of a quality service. Learning and development should always aim to improve performance in the workplace and be expressed as an outcome that benefits the tenant, service users, customer, client, or Link as an organisation.
- 1.2 Employee learning and development refers to all the policies, practice and procedures used to develop the knowledge, skills, abilities and behaviours of employees to improve the effectiveness and efficiency both of the individual and Link. It embraces all forms of blended learning and development activity including personal study, e-learning, internal or external courses, work shadowing and planned experiences.
- 1.3 It is equally important to provide learning and development that is fit for purpose and that meets the learning need. The accurate identification and analysis of the learning need is a key part of this process. The Learning & Development team provide more in-depth support in identifying learning and development needs; to ensure that the learning delivered meets the need of the individual. This may be achieved through in-depth discussion with the individual, their manager and other key stakeholders.
- 1.4 Further information on Learning & Development can be found on [Linkipedia](#).

2 Principles

- 2.1 The following principles govern the operation of this policy:
 - Be clear and understood by all employees
 - Be fair, equitable, inclusive and non-discriminatory
 - Reflect the needs of our diverse organisation
 - Reflect statutory requirements and best practice
 - Be flexible and adaptable to changing needs

3 Objectives

- 3.1 The objectives of this policy are to:
 - Ensure employees are supported within their role and ultimately reach their potential through work related career and personal development
 - Subject to available resources; provide access to appropriate learning opportunities which will enhance knowledge, skills, attitudes and/or qualifications
 - Provide Link with skilled, experienced, and suitably qualified employees to meet current and future ongoing needs and to ensure continuing effectiveness and service continuity
 - Promote the development of a culture aligned to Link's values and ethos of high performance, innovation and continuous improvement that is customer driven.
 - Ensure that employees can discharge Link's responsibilities regarding relevant legislation, codes of practice, compliance and defined procedures

- Ensure that all employees have equality of opportunity and access to learning and development, encouraging all employees to participate and be accountable for their own development
- Support the achievement of Link's activities, working practices and strategies through the provision of appropriate blended learning and development solutions

4 Approach & Method

4.1 The Senior Management Group [SMG] in its formal approval of the policy acknowledges that it accepts full responsibility for its implementation. Day-to-day responsibility for the operation of this policy lies with the appropriate directors and managers of the Link group of companies. All relevant employees have a responsibility to ensure that this policy is applied as instructed.

4.2 Approaches to learning

Employees may be asked to learn by a variety of methods, including (but not restricted to);

- trainer led, classroom delivery, conferences
- on-the-job learning
- e-learning and/or electronic micro session
- job shadowing, secondments
- open learning
- reading / self-study
- guided internet research
- coaching and/or mentoring from Link managers and employees
- webinars
- participation in project work / temporary covering of additional duties

4.3 Learning definitions

Link provides a broad range of learning and development opportunities to staff. These fall into the following categories:

- **Mandatory**: Learning deemed compulsory for either Link or the person to fulfil their legal responsibilities in the safe and efficient delivery of services, discharge of their duties and provision of a safe place of work. It is mandatory to complete this learning within a specified timescale and failure to do so may result in disciplinary action.
- **Core**: Learning that is specific to a department/job role to ensure the postholder can fulfil the role to a consistent and required standard within Link. It is not deemed mandatory from a legal perspective but represents best practice. Core training is compulsory for the postholder to complete and failure to do so may result in disciplinary action.
- **Individual**: Learning identified from induction and/or performance and development discussions to ensure the post holder meets the essential requirements of the person specification based on their individual skills, knowledge, and experience. Training can be requested by the line manager or the individual. The training is approved by the line manager / budget holder subject to affordability on an ad-hoc basis.

- **Qualifications**: A learning activity that leads to an academic or professional qualification. This type of event will generally lead to:
 - a) formal educational award gained at a Higher Educational establishment,
 - b) vocational and/or occupational qualification gained at a Further Education establishment (college) or other training provider.
- **Management Development**: Learning comprised of induction, mandatory and core learning activities that supports line managers and hiring managers to lead, manage and develop their teams in line with Link's policies, values, best practice, and legislative requirements.
- **Health & Safety**
Health and Safety awareness and any specific, job related Health and Safety training will be provided to all staff during their induction period and at regular intervals during their employment.
- **Induction Training**
Induction training will be available to all employees new to Link, and where possible they will participate in the next available course following their appointment. New staff will undertake both formal and informal induction activity. The job-holder's line manager will undertake to induct new members to the Team within the first month of employment. This will include information about the job, office procedures, and initial on-the-job training. Link Group's 1-day Induction Course is available to all new staff and is normally held in Link's Head Office in Edinburgh. The program will include a welcome from the Chief Executive; training in Health & Safety, Equality & Diversity, Data Protection and Security Awareness, as well as presentations from representatives from the Staff Concerns Panel and the Union.

4.4 Link provides appropriate funding, leave and support to employees attending authorised work-related as appropriate to their job role, mandatory, core and individual learning and development activities and undertaking professional qualifications. At Link's discretion, employees may be required to enter a Training/Qualification Fee Recoup Agreement that sets out the terms and conditions of Link funding the training/qualification, materials and other expenses and the circumstances and timescales of which the costs may be recovered from the employee when leaving Link. Refer to section 4.14 and Appendix 2 for further information.

- **Course Fees & Materials**
Link will pay, subject to authorisation and affordability, the work-related course/qualification fees and examination fees of employees whilst employed by Link.
- **Course Materials**
If the course fee does not include course materials/textbooks, Link will pay for the purchase of essential materials. Students who purchase these items directly should claim reimbursement through their partner Business Travel & Expenses policy and procedure.
- **Professional Memberships & Subscriptions**
Link will pay the student membership or subscription necessary to undertake a professional qualification by the professional body. For further information, please refer to Link's Professional Membership & Subscription Policy.
- **Business Travel Expenses**

Link will reimburse the employee for the costs of travelling to the development activity venue in accordance with the partner Business Travel & Expenses Policy.

- **Travel Time**

Employees may record their starting work time from the time that they begin their travel to the training activity or venue. Travelling time must be pre-authorised by the employee's line manager before the training activity takes place.

- **Attendance at Residential Courses**

Students attending residential courses, as part of the course requirement, will be granted paid leave to do so. Where accommodation and travel are required and the cost is not covered in the course fee, this cost will be met by Link in accordance with the partner Business Travel & Expenses policy.

- **Study Leave**

Where examinations must be taken, employees will normally be granted one day of paid study leave per exam, plus the day of the exam. Paid leave will be the employee's normal current rate of pay. There is no right to study leave during normal working hours but where this is taken, it must be authorised in advance by your line manager. This will be subject to operational business needs.

- **Examinations**

A copy of your examination timetable should be forwarded to your manager as soon as you are aware of the dates. You will receive paid leave to attend examinations as outlined above. Paid leave will be at the employee's normal current rate of pay and must be authorised in advance by your line manager.

- **Public Holidays & Weekends**

If any training, study or exam day falls on a public holiday or weekend students will be permitted to take the time back.

- **Exam Re-sits**

The cost of re-sits will be payable by you. Time off for resit exams will be unpaid. A student who has been successful in the resit examinations will continue to be supported during the next phase of the course. If a student fails the resit examinations, Link will not normally fund or allow paid leave to resit or repeat the course. Exceptional cases may be referred to the relevant Director.

- **Unsatisfactory Progress**

If a student makes unsatisfactory progress on the course due to irregular attendance or lack of application and there are no extenuating circumstances, paid leave for attendance may be withdrawn.

- **Production of Course Work**

Students may use Link's equipment (PCs, photocopier, etc) and stationery to assist in the production of course work. Students will, however, normally be required to produce assignments etc. without additional help from administrative staff.

- **Withdrawal from the course**

Prior to advising your training provider, college or university of your withdrawal you should discuss your concerns with your line manager or the Learning & Development. Either will be able to offer some advice or suggestions on how to address your concerns enabling you to continue with your studies. Should you remain adamant that you wish to withdraw from the course the Learning and Development will discuss with you and your line manager any repayment

of fees in line with the scale of recovery after commencement of study outlined earlier.

4.5 Line manager responsibilities

Line managers will have a responsibility for the following:

- Identify learning and development needs based on department priorities and budgets, mandatory or regulatory requirements - as well as individual development needs
- Ensure the appropriate department/partner budget and management approvals have been secured before making commitments to learning activities, (See [Appendix 2](#))
- Lead the performance management process with employees, to identify opportunities which are suitable to their learning needs and requirements
- Assist employees to develop through workplace learning activities and/or nominating employees to appropriate learning and development opportunities
- Support employees to encourage the transfer of learning into the role
- Ensure development opportunities are provided on an equal and fair basis

4.6 Employee responsibilities

Employees will have a responsibility for the following:

- Participate in the performance management process, to identify opportunities which are suitable to their learning needs and requirements
- Take ownership for their own development and complete all learning activities required
- Understand what they are expected to gain/learn from a learning activity and transfer this into their role
- Raise any special need or requirement with their manager, Learning & Development team and / or advise the relevant learning provider if they have any
- Make every effort to attend all scheduled learning events / activities and advise your line manager as soon as reasonably practical, if you are unable to attend

4.7 Learning & Development team responsibilities

The Learning & Development team will have a responsibility for the following:

- Planning and coordinating all learning and development activity across Link; to meet individual, team, mandatory and corporate requirements.
- Completing a Learning Needs Analysis and Training Matrix with each department, to help identify learning and development needs
- Continuously plan and monitor learning activity and L&D budgets
- Support line managers and employees requiring reasonable adjustments to participate in learning activities
- Update individual employee training and qualification records on iTrent and third-party systems
- Collating, monitoring, and reporting of feedback from learning events and activities
- Sourcing and management of appropriate learning and qualification providers
- Identify appropriate funding sources for the provision of learning and development activities.

- Report regularly to SMG and department managers on learning activity and budgets
- Design and delivery of internal learning activities and inductions

4.8 Learning priorities

The Learning & Development team will endeavour, as far as possible, to meet the learning and development needs of individual employees. Priority will be given, however, to any learning and development activity that is necessary to ensure that:

- Link's legal obligations are met
- Link's business objectives are achieved
- A high standard of service is provided to all our customers and service users.
- Working environments comply with Health & Safety regulations
- Employees have the necessary skills to perform their jobs effectively and safely

4.9 Budget management

Each SMG Director / Department Head manages a departmental learning budget which covers spending on professional qualifications, training courses, seminars and conferences, travel expenses and professional subscriptions.

The Learning & Development team manages a separate corporate-wide L&D budget covering spend on corporate-wide Mandatory and Core training, projects and the Employee Further Education Scheme (See [Appendix 1](#)).

4.10 Transfer of learning

To ensure that staff can transfer what they have learnt back onto the job, it is important that employee and line manager hold discussions pre and post course.

Before learning activities are completed, line managers should encourage employees to consider what their objectives and expectations from attendance will be. This can help them consider what personal development objectives they may want to progress. After completing a learning event, the employee should discuss with their line manager how they can apply the learning and the support they may need to do this.

4.11 Attendance on learning events

The L&D team will ensure that all learning events organised are accessible to individuals with disabilities. Taking care to create an accessible event benefits not only individuals with visible or known disabilities, but also helps to ensure that all participants/attendees, including individuals with non-obvious disabilities and/or chronic health conditions, and people of all ages and body types, are able to fully engage in the event.

Managers who authorise learning and development requests for members of their team are expected to make every possible effort to allow participants to attend. While there will always be last-minute problems that prevent attendance, withdrawal from training should be kept to a minimum. Equally, participants are expected to make every effort to attend training that the organisation has invested in on their behalf.

Where an employee fails to attend a previously booked and confirmed training and development activity, without having given prior notice of cancellation, the relevant partner will be charged the appropriate rate for that booking.

4.12 Maintenance of Learning & Development records

A full record of learning activities for each employee will be recorded on iTrent by the Learning & Development team. Where departments organise their own learning activities, a record of attendance should be kept and provide to the Learning & Development team, for input onto iTrent.

4.13 Evaluation of learning activities

All development activities carried out either within Link or delivered externally should be evaluated to ensure quality, effectiveness, and best value.

The Learning & Development team will ensure that all learning activity is evaluated to:

- Assess the effectiveness of the investment in the learning activity
- Provide feedback to the learning provider about performance and methods
- Enable improvements to be made in the choice/method of learning
- Indicate to what extent objectives have been met and whether any further learning needs remain
- Develop the learner's progression round the learning cycle

Where departments organise their own learning activities, advice should be sought from the Learning & Development team on how to evaluate the effectiveness of these. Evaluation information should be retained for reference.

4.14 Training / qualification fee recoup

There may be occasions where an employee completes an external course / qualification, which is deemed to be of value to the individual's role and incurs a cost to Link. This course / qualification is paid from the appropriate department or corporate-wide budget.

In these circumstances' employees may be required to enter into a training / qualification fee recoup agreement. The recoup agreement enables Link to reclaim all, or some of the costs incurred, if the employee leaves their employment during the course / qualification, or within a specified period after the course / qualification has ended (see [Appendix 2](#)).

4.15 Employee Further Education Support (EFES)

EFES is an annual non contractual and subject to affordability initiative which enables eligible Link employees to apply for support and funding towards further education. A further education course that is eligible for EFES funding is one which Link recognises as being relevant to an employee's current post, or in support of the employee's career development aspirations within Link.

The types of development / events that are covered by the EFES Funding include:

- Higher & Further Education Qualifications and Certificates
- Short-term courses
- External events

Full details of the EFES initiative can be found on [Linkipedia](#).

5 Monitoring of the Policy

Any matter which demonstrates a serious failure of internal controls should be reported immediately to the Chief Executive.

6 Complaints and Appeals

Employees have the right to appeal any decisions made on matters covered by this Policy according to the Grievance Procedure found on Linkipedia.

7 Policy Availability

This policy is available on request free of charge from Link. A summary of this policy can be made available in a number of other languages and other formats on request.

8 Policy Review

Link undertakes to review this policy regularly, at least every three years, regarding:

- Applicable legislation, rules, regulations and guidance
- Changes in the organisation
- Continued best practice

9 Appendix

9.1 Appendix 1 – Budget Management

Details of the different Learning & Development budgets across Link, which items they cover and the required level of authorisation.

1. Department / Partner Budgets

Budget Heading	Items Covered	Approval Responsibility
Departmental Learning & Development Budgets	<ul style="list-style-type: none"> ▪ Departmental Mandatory training ▪ Departmental Core training ▪ Group/Individual training requests ▪ Qualifications ▪ External conferences ▪ Textbooks ▪ Team building events ▪ Team meetings / conferences ▪ Catering, room and equipment hire for learning events ▪ Cancellation fees from non-attendance or cancelled learning events 	Department L&D budget holder / SMG Director
Professional Subscriptions	<ul style="list-style-type: none"> ▪ Professional subscriptions e.g. CiH, SSSC, etc. – (as per policy) 	
Travel & Subsistence Budget	<ul style="list-style-type: none"> ▪ Travel and accommodation to attend learning or conference events 	

2. Corporate-wide Learning & Development Budget

Budget Heading	Items Covered	Approval Responsibility
Corporate Training	<ul style="list-style-type: none"> ▪ Corporate-wide Mandatory training ▪ Corporate-wide Core training ▪ Corporate Induction ▪ Corporate-wide eLearning / LMS access ▪ Webinar system access ▪ Catering, room and equipment hire for Corporate-wide learning events ▪ Project related learning events 	L&D Business Partner
Corporate H&S	<ul style="list-style-type: none"> ▪ Training and development as required to support designated H&S First Aiders, Fire Wardens and other H&S representatives ▪ Corporate-wide Mandatory H&S training ▪ Catering, room and equipment hire for Corporate-wide learning events 	Health & Safety Officer / L&D Business Partner
Further Education Support	<ul style="list-style-type: none"> ▪ Annual Employee Further Education Support (EFES) initiative – (as per policy) 	L&D Business Partner

9.2 Appendix 2 – Training / Qualification Fee Recoup Agreement

Name:		
Job Role:		
Department:		
Partner:		
Course Title:		
Venue:		
Course Commencement Date:		
Course Completion Date:		
Number of Days Absence Anticipated:		
Total Course Fees:	£	VAT:
Anticipated Related Expenses:	£	VAT:
Total Costs:	£	VAT:

I understand that the support from Link for this course is conditional upon satisfactory performance and attendance (at work and the course) and examination success (where relevant).

I agree to reimburse Link in accordance with the Scales of Recovery set out below should I leave employment of my own accord, or as a result of disciplinary action or capability proceedings, either during my studies or within a period of two years from completion of training.

Scale of recovery

During course or up to 6 months after completion:	100% of the total costs incurred
6 months to 12 months after completion:	75% of the total costs incurred
12 months to 18 months after completion:	50% of the total costs incurred
18 months to 24 months after completion:	25% of the total costs incurred

(Date of completion is deemed to be the date of the final examination or, where there is no examination, the last day of the course. Total costs incurred includes course fees, books and related expenses)

I understand that the above will not apply in the event of my redundancy from Link, whether compulsory or voluntary.

I further understand that, at Link's sole discretion, any mitigating circumstances may be considered.

Study leave

Where examinations must be taken, employees will normally be granted one day of paid study leave per exam, plus the day of the exam. Paid leave will be the employee's normal

current rate of pay. There is no right to study leave during normal working hours but where this is taken, it must be authorised in advance by your line manager. This will be subject to operational business needs.

Examinations

A copy of your examination timetable should be forwarded to your manager as soon as you are aware of the dates. You will receive paid leave to attend examinations as outlined above. Paid leave will be at the employee's normal current rate of pay and must be authorised in advance by your line manager.

Public Holidays & Weekends

If any training, study or exam day falls on a public holiday or weekend students will not normally be permitted to take the time back.

Exam Re-sits

The cost of re-sits will be payable by you. Time off for resit exams will be unpaid. A student who has been successful in the resit examinations will continue to be supported during the next phase of the course. If a student fails the resit examinations, Link will not normally fund or allow paid leave to resit or repeat the course. Exceptional cases may be referred to the relevant Director.

Withdrawal from the course

Prior to advising your college or university of your withdrawal you should discuss your concerns with your line manager or the Learning & Development. Either will be able to offer some advice or suggestions on how to address your concerns enabling you to continue with your studies. Should you remain adamant that you wish to withdraw from the course the Learning and Development will discuss with you and your line manager the repayment of fees in line with the scale of recovery after commencement of study outlined earlier.

Books and Expenses

A maximum of £75 per academic year will be allowed for the purchase of books to be claimed using the normal expenses procedure.

In circumstances where the place of study is a considerable distance away from either your home or place of work employees may claim for business travel and expenses through the appropriate partner policy and with the prior approval of your line manager.

Examination results

You should provide copies of your examination results to your line manager, who will then forward a copy to the Learning and Development team to be added to your learning and development records.

Attendance

Any absences should be discussed and agreed with your line manager prior to the event. You are responsible for advising or explaining your absence to the training provider, college/university.

Persistent nonattendance may result in formal action by the Company and possible withdrawal of the Company's support for further academic study. In such circumstances

you may be expected to repay fees incurred in keeping with the earlier indicated scale of recovery.

Recoup Fees Agreement

I the undersigned agree and fully acknowledge all of the above. I agree

- that if my employment terminates during the course, or within 2 years of its completion, I will repay some or all of the fees, expenses and other costs (the **Costs**) associated with such training courses in accordance the terms of this Agreement; and
- that the Company may deduct the sums due by me under this Agreement from my salary or from any payments due to me; and
- that if any sums remain payable by me under this Agreement within 28 days of me leaving employment, these sums may be recoverable from me as a debt.

Privacy Impact Assessment Screening Questions

Carrying out a Privacy Impact Assessment [PIA] will be useful to any project – large or small – that:

- Involves personal or sensitive data about individuals
- May affect our customers' reasonable expectations relating to privacy
- Involves information that may be used to identify or target individuals

Please tick the applicable statement(s) below. Will your project involve:

1. A substantial change to an existing policy, process or system that involves personal information Yes No
2. A new collection of personal information Yes No
3. A new way of collecting personal information (for example collecting it online) Yes No
4. A change in the way personal information is stored or secured Yes No
5. A change to how sensitive information is managed Yes No
6. Transferring personal information outside the EEA or using a third-party contractor Yes No
7. A decision to keep personal information for longer than you have previously Yes No
8. A new use or disclosure of personal information you already hold Yes No
9. A change of policy that results in people having less access to information you hold about them Yes No
10. Surveillance, tracking or monitoring of movements, behaviour or communications Yes No
11. Changes to your premises involving private spaces where clients or customers may disclose their personal information (reception areas, for example) Yes No

If you have answered 'Yes' to any of these points, please complete a full Privacy Impact Assessment. If you have answered 'No', you need take no further action in completing a Privacy Impact Assessment.

Equality Impact Assessment Screening Questions

Will the implementation of this policy have an impact on any of the following protected characteristics?

- | | | |
|-----------------------------------|---|--|
| 1. Age | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| 2. Disability | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| 3. Gender reassignment | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| 4. Marriage and Civil Partnership | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| 5. Pregnancy and Maternity | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| 6. Race | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| 7. Religion or belief | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| 8. Sex | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| 9. Sexual orientation | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |

If you have answered 'Yes' to any of these points, please complete a full Equality Impact Assessment. If you have answered 'No', you need take no further action in completing an Equality Impact Assessment.