

Learning and Development Policy

Revised: Mar 22
Next Review: 2025



Rosehill Housing Co-operative Limited

1. Introduction

1.1 Rosehill recognises that to be a successful business with strong governance it must invest in its people. Rosehill's Management Committee and Staff must be equipped to deliver Rosehill's Vision and Objectives at a Strategic and Operational level.

1.2 The reference to our people relates to our Management Committee and Staff, however specific references are made where required.

1.3 Management Committee

1.3.1 Rosehill is governed by a Management Committee of volunteer members who share a commitment to Rosehill's aims and objectives. Rosehill is committed to promoting and demonstrating the highest standards of governance. We recognise and value the voluntary commitment of our Management committee. We aim to support our committee members to carry out what is a very demanding role.

1.3.2 We consider the range of skills, knowledge and expertise that we think our Management Committee needs in order to lead and direct Rosehill and maintain our success as a high quality landlord.

1.4 Staff

1.4.1 The day-to-day running, management and operation of Rosehill is the responsibility of the Director supported by our Management and Staff Teams.

1.4.2 We recognise the importance of having highly skilled and suitably qualified staff to ensure we successfully deliver our vision and objectives.

1.5 Our Commitment

1.5.1 We are committed to ensuring that our people have access to appropriate support, information and training to enable them to carry out their roles effectively. We recognise that having effective and motivated people, along with appropriate policies and procedures, play a key role in ensuring that our tenants receive the best possible services.

1.5.2 We will provide appropriate training and opportunities for personal development. To do this, we have developed this learning, support and development framework.

1.5.3 The policy is consistent with requirements of the Regulatory Standards of Governance and Financial Management published by the Scottish

Housing Regulator: “*The governing body and senior officers have the skills and knowledge they need to be effective*” (Standard 6)

2. Our Vision, Strategic Objectives and Values

2.1 Our vision is “to provide excellent quality, affordable and efficient homes in neighbourhoods that are well managed and maintained; to contribute to sustaining communities where people feel safe and want to live by providing housing and other services and working with its voluntary and statutory partners.”

2.2 Key to realising our Vision is through the delivery of our seven Strategic Objectives:

1. Provide high quality and affordable homes
2. Engage effectively with tenants and service users
3. Deliver value for money
4. Be innovative and risk aware
5. Build and contribute to effective partnerships
6. Use our resources efficiently and effectively
7. Achieve the highest standards in all that we do

2.3 The delivery of our Vision and Strategic Objectives is underpinned by our Core Values:

We will

- Invest and Support

We will be

- Engaged and Responsive
- Accountable and Compliant
- Fair and Approachable
- Efficient and Responsible
- Excellent and Committed

3. Purpose

3.1 This Policy considers the needs of our People collectively and as individuals. It has been developed to:

- Maximise the contribution made by our people, individually and collectively, to the work of Rosehill

- Regularly review the Management Committee's effectiveness in leading and directing Rosehill
- Annually review the contribution of individual Management Committee members in order to identify the support they require from Rosehill
- Identify learning needs for the Management Committee as a whole, for the Chair and for individual Management Committee members
- Review the contribution of individual staff members through twice yearly Performance and Training Reviews to assist with the identification of any support and training needs

4. Training, Support and Development

4.1 We recognise that our people as individuals have different training needs based on their experience, their interests, their learning styles, their current position and future aspirations. As a result, training and development opportunities are tailored to suit the individual as far as possible.

4.2 Our people are expected to share the responsibility for identifying their own training and development needs, and to participate in the development opportunities identified, including attending relevant courses, obtaining relevant qualifications and other events.

4.3 Mechanisms for Management Committee

4.3.1 Induction – is provided for new committee members which includes training, briefing sessions and information (Committee Members' Handbook). The training will combine a mix of external (delivered at Rosehill's office or external venue), in-house and on-line modules. Training can be held in-person, virtually or a mix of both.

4.3.2 Buddying Programme – depending on the experience and knowledge of new Committee Members, they will be offered the opportunity to "buddy" with a more experienced Committee Member who will act as a mentor over a period of up to one year.

4.3.3 Training Needs Analysis (TNA) – following the annual assessment of Committee Members (individually and collectively) contribution and effectiveness, a TNA will be carried out which will produce Committee's annual training programme.

4.3.4 All Management Committee members have access to a range of training, development and support opportunities to help them fulfil their role with

Rosehill. These may include:

- Attendance at externally run seminars, workshops, training sessions and conferences
- Attendance at in-house training sessions
- Participation in annual Business Planning/Review
- Mentoring, shadowing and/or coaching from experienced Management Committee members (and/or office bearers)
- Networking with other Management Committee members and members of other Management Committees, both locally and nationally
- Briefings by Director or Management Team
- Briefings by external trainers or experts
- Subscriptions to housing and other relevant journals
- Access to relevant on-line training and information

4.4 Mechanisms for Staff

4.4.1 Induction – this will take the form of training (external and in-house), briefings and information. The content will vary depending on the staff member's experience and knowledge but as standard will include: health & safety, our policies, the staff code of conduct and other key organisational information.

4.4.2 All Staff have access to a range of training, development and support opportunities to help them fulfil their role with Rosehill. These may include:

- Attendance at externally run seminars, workshops, training sessions and conferences
- Attendance at in-house training sessions
- Participation in annual Business Planning/Review
- Mentoring, shadowing and/or coaching from experienced colleagues (and/or Director/Line Managers)
- Networking with staff from other RSLs both locally and nationally
- Briefings by Director or Management Team
- Briefings by external trainers or experts
- Subscriptions to housing and other relevant journals
- Access to relevant on-line training and information
- Continuous Professional Development
- Professional Qualifications
- Internal Secondment Opportunities

4.4.3 Professional Qualifications – we will encourage members of staff to either obtain professional qualifications or enhance their professional

qualifications if felt to be beneficial to the organisation. We will also consider funding training courses as a means of personal development. These may not necessarily be directly related to the staff member's job.

4.4.3.1 The Director has delegated authority to approve any courses of study for all staff; the Director may also agree to the following, notwithstanding provisions made within the Conditions of Service, B4 Training and Development (see Appendix 1):

- Payment of Course Fees
- Payment of Examination Fees
- Day Release/Block Release
- Examination leave and study leave
- Allowance for books/materials or other out-of-pocket expenses
- Membership fees of professional body (must be directly relevant to the person's job)

4.4.3.2 We will not normally fund re-sit examinations or grant further special leave for re-sit examinations.

4.4.3.3 There are rules applied to providing funding for a course of study, as per the Conditions of Service, including:

- Repayment of the fees if the staff member leaves within 12 months of completing the course or if the staff member or the training organisation prematurely ends the course or the staff member is dismissed during that period

4.4.3.4 Any staff member wishing to undertake a course of study will be required to sign an agreement. (see Appendix 2)

4.4.3.5 The Staffing and Health and Safety Sub-Committee has the delegated authority to hear appeals about the repayment of fees. The Sub-Committee's decision in this regard is final.

4.4.3.6 The Director will consider all requests for professional education/training from staff and recommendations from the relevant Line Manager and will decide, in each case:

- Whether the qualification in question is appropriate to the needs of Rosehill; whether it is appropriate to the career development of the particular member of staff, or whether it is appropriate as a self or personal development mechanism;
- Whether Rosehill can commit the level of resources required (time and money) over the period in question. Generally where the course of

study involves day release, the number of staff allowed to undertake such a course of study at the same time, will be two. The two staff members can't be from the same team. In such cases, requests would be considered on a first come first serve basis.

- Whether Rosehill is likely to face competing demands on resource. Decisions made will reflect the needs of Rosehill and not "length of service", "seniority" etc., of individual staff members.

4.4.3.7 The Corporate Services and HR Manager will report outcomes of any courses of study to the Staffing and Health and Safety Sub-Committee annually.

4.4.3.8 Should the Director refuse any such request for training/education then the employee will be notified in writing of the reasons for the decision. The Director's decision is final.

4.4.3.9 The Director, supported by the Corporate Services and HR Manager, will monitor the performance/attendance of staff undertaking such courses of education/training and Rosehill reserves the right to withdraw its support in appropriate circumstances. Written reasons will be given in the event of such withdrawal.

5. Training and Development Budgets

5.1 To ensure its people can receive the necessary support and undertake training and development, which enables them to fulfil their roles effectively, adequate funding must be provided. The Management Committee approve annual budgets for Committee and Staff training and development. The Director has full delegated authority to spend the staff training and development budget in the most appropriate way.

6. Appraisals

6.1 Reviews of our people's contribution to the work of Rosehill are essential to ensure Rosehill's success, operate at the highest standards of Governance and provide an excellent service to our tenants and other customers.

6.2 Management Committee Members

6.2.1 In accordance with regulatory requirements, Rosehill requires individual Management Committee Members to take part in annual appraisals of their own individual contribution to Rosehill. This process is undertaken by an appropriate external company on our behalf. The process involves the completion of surveys which are then followed up

with one-to-one meetings. The meetings are relatively informal (but follow a standard structure) and are designed to encourage individuals to be open and honest about their contributions to the work of the Management Committee and how these can be enhanced. In order to assist succession planning, the meeting also covers members' expectations and future intentions. Following the completion of the Appraisal process, each Committee Member is provided with an Individual Learning Statement (ILS) which is held in their Committee files. The ILS captures the individual's training and development needs.

6.2.2 The objectives of the Appraisal process are to:

- Review the Committee member's contribution to Rosehill;
- Review the effectiveness of the training and development opportunities provided since the last review;
- Review the performance of the Management Committee as a whole;
- Identify the Management Committee member's intentions in terms of standing for re-election and/or seeking to hold office;
- Identify training and/or development needs and agree priorities and appropriate resources.

6.2.3 An Appraisal Report is produced which provides the results/outcome of the appraisal process for the Committee collectively. It provides a skills audit, or an assessment of the extent to which the skills, knowledge and other attributes of current Committee members matches the attributes required by the Committee. The results of the skills audit are reported to the Management Committee (see section 7) enabling decisions to be made about how any gaps identified can best be addressed.

6.2.4 In accordance with Rule 34.6, any Committee Member with 9 years or more continuous service, and who is seeking re-election, must be able to demonstrate his/her continued effectiveness as a Committee Member before they may stand for re-election. Additional questions are covered in the Annual Appraisal process for all Committee members subject to the 9 year rule. However, all Committee Members with 9 or more years' service, regardless of whether they are due or not to stand for election at the next AGM, are asked these additional questions.

6.3 The Chair

6.3.1 As part of the Annual Appraisal process an appraisal is carried out of the Chair based on feedback by his/her fellow Committee Members. A summary of the key findings forms part of the Appraisal Report.

6.4 Staff Members

6.4.1 Formal performance and training reviews of staff are undertaken twice yearly i.e. mid-year reviews and year-end reviews. The process involved is the subject of a separate policy on Staff Appraisals. The reviews are based on staff's individual work plans (produced by staff and approved by Line Managers) which include key targets and tasks. The reviews are carried out by Line Managers. In the case of the Director, the reviews are carried out by the Chair and Vice Chair.

7. Reporting to the Management Committee

7.1 A report is made to the Management Committee in the first quarter of the financial year that identifies:

- Key findings from the skills audit, identifying any gaps in the skills and knowledge requirements of Rosehill
- Key findings about the performance of the Management Committee identifying areas for improvement
- Training requirements for the subsequent year in the form of an annual Development Plan for the Management Committee as a whole
- Priorities for recruitment of new Management Committee members to be identified as part of the preparations for the Annual General Meeting.

7.2 The Management Committee monitors the implementation of the annual Development Plan by considering twice yearly reports that identify training undertaken and events attended.

8. Training and Development Plans

8.1 Individual training and developments plans are produced for our people at the start of each financial year. These will take account of:

- the outcome of the annual assessments (Committee Members) and the year-end performance and training reviews (Staff Members);
- the identified priorities and objectives for the coming year.

8.2 The Plans will set out the category of training e.g. organisational wide, team, individual and optional. It will also show the type of training e.g. seminars, training courses, conferences, on-line modules and courses of study. They will be updated during the year to show the status of training e.g. completed and to enable any additional training identified to be added.

- 8.3 The Director will put together the training and development plans for Committee based on the annual assessments and the outcome of the training needs analysis. Each Committee Member will agree their individual plan.
- 8.4 In the case of staff, Line Managers will be responsible for producing the training and development plans for their own teams and, in conjunction with the individual staff member.
- 8.5 The Corporate Services and HR Manager (CS&HRM) is responsible for ensuring that all staff training plans are in place early in the first Quarter of each financial year and, implemented over the year. The CS&HRM will provide an annual report to the Staffing and Health & Safety Sub-Committee on the staff training undertaken in the year.
- 8.6 In the case of the Director's training and development plan this will be produced in conjunction with the Chair and potentially the Vice Chair.

9. Evaluation of Training and Development

- 9.1 To ensure that any training undertaken is effective, beneficial and meets the needs of our people and our business needs, Committee and staff will be required to provide feedback on all externally sourced training using the Evaluation Form attached at Appendix 3.

10. Equality and Diversity

- 10.1 We are committed to providing fair and equal treatment to all our people, tenants and other customers and will not discriminate against anyone on the grounds of race, colour, ethnic or national origin, language, religion, belief, age, gender, sexual orientation, marital status, family circumstances, employment status, physical ability and mental health. In implementing this policy we will positively endeavour to achieve fair outcomes for all.
- 10.2 If any of our people have additional needs that require to be met to enable them to effectively engage in training and development, we will ensure appropriate measures are put in place to remove any barriers that may exist.

11. Data Protection

- 11.1 On the 25th May 2018 the legislation governing data protection changed with the introduction of the GDPR. Following the UK's exit from the EU, and the end of the transition period which followed, the GDPR formed part of the retained EU law and became the UK GDPR which together

with the Data Protection Act 2018 constitute the UK's data protection legislation.

12. Risk Management

- 12.1 In all key areas of our business we need to consider any risks which may arise. To this end we have in place a robust Risk Management Policy and from this flows our Risk Register. We have identified our material risks which are regularly monitored by our Management Team and Audit Sub-Committee.
- 12.2 We recognise that having poorly or inadequately trained people can lead to a number of risks including: poor governance, poor service provision, demotivated and disengaged committee and staff which have implications relating to Regulatory intervention.
- 12.3 To mitigate such risks it is essential that we have a clear and comprehensive policy in place to govern our training and development approach and processes and, to ensure its implementation.

13. Policy Review

- 13.1 This Policy will be reviewed every 3 years or sooner, if required, to ensure compliance with all legislative and regulatory requirements and that it continues to reflect best practice.

Appendix 1 – Extract from EVH Terms and Conditions

B 4

Training and development

1. General

We are fully committed to developing all of our employees. Through the regular appraisals, you will be aware of how your work as an individual contributes to the organisation achieving our overall aims. We will encourage you to carry out training which relates directly to your work and career so you can improve your job performance and the service we provide.

You should read the full Learning and Development Policy which is located in the Central Library.

2. Vocational training and qualifications

If you want to take part-time vocational courses directly relevant to your career, you can discuss this with your line manager and see what help we can provide.

2.1 For appropriate courses (such as those leading to technical or professional qualifications), we can provide up to 100% of the cost or fees. We will pay the fees directly to the educational organisation or institution.

Rules which apply to this funding:

We treat the fees paid as a loan. We will write off the loan 12 months after finishing the relevant course or examination. We will ask you to refund the full or part of the cost of fees (as outlined in the undertaking attached to this policy) if you voluntarily leave your employment within those 12 months, if you or the training institution prematurely ends your course or if you are dismissed during that period.

If you withdraw from a course, you will have to repay the fees on the basis of 2.1 above, unless:

- you give us written justification and we agree that you withdraw from the course; and
- you have had to withdraw due to long-term sickness, maternity leave or redundancy.

2.2 We will give you paid leave to sit examinations for courses approved by the Management Committee. This leave with pay will include the previous half-day

(if the examination lasts half a day) or the previous day (if the examination is over a full day).

If you ask to take annual leave around the time of examinations, we will give this priority and consider your request sympathetically.

3. Professional membership fees

We may refund annual fees you pay for membership of professional institutions depending on the following conditions.

- Your membership must be directly relevant to your job
- We will only refund one set of fees if you are a member of more than one institution.
- You will need to give us receipts for the fees.
- We will make payments after tax.

Appendix 2

Undertaking to repay a loan for professional or vocational training fees

I,..... , agree that I will continue working for you, Rosehill Housing Co-operative Limited, for 12 months after completing any course you have paid the fees for.

If I leave your employment or am dismissed before the end of 12 months after completing the course or if I leave the course (or the institution makes me leave), I will refund you an amount to cover the period of service I would be due to work. This will be worked out using all money loaned to me for the course of studies.

I agree that you may take any amount I owe from my salary or other payments due to me under my contract of employment.

Signed Date

Appendix 3

Training - Evaluation Form

Name:	Position:
Course Title:	
Trainer/Training Organisation:	Date:
How well did the above training meet your needs? (Please ✓ the appropriate box)	
In full <input type="checkbox"/> In part <input type="checkbox"/> Not at all <input type="checkbox"/>	
If you ticked in part or not at all, please explain why:	
Please provide some details as to the benefits of the training and how it will help you in your role:	

Would you recommend this training to others in Rosehill?

Yes

No

Please rate the following aspects of the training:

	Very Poor	Poor	Average	Good	Very Good	Excellent
Trainer's knowledge						
Trainer's delivery						
Course Material						
Venue						

If you rated any aspects as Average or below, please provide some details:

Signature:

Date: