



## Learning and Development Policy Version 2.1

<p><b>Important:</b> This document can only be considered valid when viewed on the Trust website. If this document has been printed or saved to another location, you must check that the version number on your copy matches that of the document online.</p> <p><b>Name and Title of Author:</b></p>	
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<p><b>Related Documents:</b></p>	<p>All staff</p>
	<p>Trust Performance and Appraisal Policies Governance Handbook</p>

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## **POLICY STATEMENT**

The Education Alliance (the Trust) has a vision based on seeking excellence through inspirational leadership, teamwork, innovation and challenge we work to ensure that all of us achieve our best. Our values are:

- Working together for students
- Generating ideas and sharing outstanding practice
- Promoting independence and interdependence
- Encouraging questioning, feedback and challenge

The Trust has four guiding principles:

- Believe in the team
- Focus on learners to drive decisions
- Keep it simple, do it right
- See it, own it, make it happen

As an adaptive, agile organisation, the Education Alliance is committed to continually enhancing employee capability, ensuring employees are attuned to the external environment and prepared for change. The Trust invests in learning and development, providing employees with a range of opportunities aligned to the needs of the organisation and the needs of teams and individuals in a fair, transparent, sustainable way.

### **1. PURPOSE**

Learning and development sits within a framework of performance management, ensuring employees have clear roles and responsibilities alongside clarity of expectations, required knowledge, skills and competencies. Through performance management each member of staff is encouraged to consider current and future needs, plans and objectives. Reviewing their performance, knowledge, skills, expertise and competencies, employees are able to assess with their line manager their learning and development needs and to prioritise those needs. Managers are also able to consider team development needs and opportunities, encouraging shared development and collaboration.

The Trust acknowledges that the success of the organisation relies on excellent leadership, a shared passion for teaching and learning, high aspirations for student/pupil learning, and a talented workforce that continues to grow and develop. It is vital that employees are able to access high quality learning and development at the right time in a fair, transparent, affordable and sustainable way.

### **2. SCOPE**

This policy applies to all employees and other stakeholders such as Trustees, Members, Governors and trainees.

### **3. ROLES AND RESPONSIBILITIES**

The **Trust Board** is responsible for ensuring this policy is applied fairly and consistently across the Trust, monitoring the effectiveness of this policy, ensuring that an appropriate framework is in place to enable fair access to high quality learning and development opportunities that are fit for purpose, value for money and address current and future needs. Members, Trustees and Governors must be willing and able to access appropriate learning and development through the Trust to ensure their knowledge, skills and expertise remain up-to-date.

The **CEO and Executive Principal** are responsible for ensuring that staff and others adhere to this policy and that learning and development is aligned to the Trust objectives. The CEO and Executive Principal will also monitor return on investment, access and impact.

The **Human Resources Department** is responsible for ensuring that all employees are aware of this policy and associated procedures. The team will also ensure that this policy is implemented fairly and consistently.

**Leaders and managers** must ensure they implement this policy fairly and equitably, seeking guidance, clarification and support as and when required.

All **employees** must be willing and able to access appropriate learning and development, ensuring their knowledge, skill and expertise is up-to-date.

The **Local Governing Bodies and Heads of School** are responsible for monitoring the application of this policy within their respective schools.

#### **4. EQUALITY AND DIVERSITY**

The Trust is committed to:

- Promoting equality and diversity in its policies, procedures and guidelines, adhering to the Equality Act 2010.
- Delivering high quality teaching and services that meet the diverse needs of its student population and its workforce, ensuring that no individual or group is disadvantaged.

#### **5. STATUTORY AND MANDATORY TRAINING**

Statutory and mandatory training is embedded in the Trust's culture of continual professional development. It is based on national and local requirements, professional expectations and the objectives and values of the Trust. Statutory training ensures the Trust remains compliant with relevant statutory provision and mandatory training ensures individuals conduct themselves safely at work. Employees and other stakeholders must complete the statutory and mandatory training requirements for their role. Failure to adhere to this requirement places individuals, teams and the Trust as a whole at risk and whilst the Trust will encourage compliance in a supportive way, where an individual refuses or consistently fails to comply, further action may be taken as appropriate to mitigate the associated risk (e.g. potential disciplinary action for employees/failure to achieve a satisfactory probationary period and removal of office for a Trustee/Governor).

Achievement of statutory and mandatory training requirements is crucial, therefore it is unlikely that employees will have additional learning and development requests approved where they have failed to meet their statutory/mandatory requirements. Statutory and mandatory training is classed as a priority in terms of learning and development budgetary spend and approval mechanisms. Additional learning and development requirements are viewed as secondary priorities and learning and development requests that are purely aspirational and not required for the fulfilment of the role may be approved where it is viewed to be in the best interests of the Trust and there is funding available once all primary and secondary learning and development needs have been met. A guide detailing statutory and mandatory requirements can be accessed via the HR Department. The list is not exhaustive and may require review as statutory and mandatory requirements may change.

## **6. LEARNING AND DEVELOPMENT REQUESTS**

Learning and development requirements should be identified as part of the performance management process, where possible. When submitting a request employees should detail the reason for their request, which should fall into one of the following categories:

1. Statutory, mandatory or compliance training
2. Addressing a particular gap in skills, knowledge or competencies
3. Required CPD
4. Maintain professional standards
5. Contribute to departmental/whole school/Trust development
6. Career progression/succession planning

Employees are expected to make every reasonable effort to attend learning and development activities arranged by the Trust or their school and failure to attend may result in the employee having to repay the cost of the course fees and any expenses paid. Employees and/or line managers wishing to cancel internal and external attendance at learning and development events must notify the individual that originally approved their learning request at the earliest opportunity.

## **7. HIGH COST LEARNING**

The Trust is committed to the development of its employees and will, where possible, support individuals in obtaining further education qualifications, provided that it will directly enhance the individual's performance and there is a clear benefit to the Trust.

Where there is a significant cost to the Trust (e.g. over £2,000) employees may be asked to sign a 'Sponsored Learning Agreement' (Appendix 1) to agree the repayment of a proportion of the cost of the fees to the Trust by the employee should they leave the organisation within a specified period of time. Sponsored learning agreements will not apply to statutory and mandatory training requests.

Associated fees and expenses (e.g. resources and time off for study or exams) will be agreed on an individual basis, taking into account the commitment from the individual with regards cost and time. Employees are expected to complete their study/exams in their own time where possible, however the Trust understands that this is not always possible and therefore employees must notify the Trust of any required time off at the time of signing the Sponsored Learning Agreement Form so that the request can be considered as a whole before the learning and development request is approved. Failure to disclose associated fees and expenses, and associated leave requirements at the time of initial request may result in costs and leave being refused at a later date.

## **8. EVALUATION AND IMPACT OF LEARNING**

Employees are encouraged to provide their managers with feedback regarding the way in which the activity met their learning needs to enable the Trust to continue to deliver and commission high quality learning and development that is also value for money, meeting or surpassing specified learning needs. Line managers are expected to facilitate the dissemination of learning and development within and across teams to widen the scope of learning and development across the organisation in a collaborative, cost-effective way.

Employees are encouraged to reflect on their learning and the way in which they can maximise their learning at work.

#### **9. MONITORING COMPLIANCE WITH AND EFFECTIVENESS OF THE POLICY**

Effectiveness and compliance of this Policy will be monitored on an annual basis.

#### **10. REVIEW**

This Policy and Procedure will be reviewed within two years of the date of implementation with recognised trade unions at local secretary level.

### The Education Alliance Sponsored Learning Agreement

The Education Alliance is committed to the development of its staff and will support individuals in obtaining further education qualifications, provided that it will directly enhance the individual's performance and there is a clear benefit to the school.

A proportion of the cost of the fees will be repayable to the Trust by the employee in the following circumstances:

If the employee fails to complete a course that the Trust has paid for by

- not attending
- resigning from the course
- being asked to leave the course by the college/university/associated body
- voluntarily leaving the Trust

Under normal circumstances, the employee will be asked to repay the course fees and any other associated fees and expenses (i.e. exam fees, enrolment costs and the reimbursement of text book costs) in line with the following schedule. The Trust retains the discretion not to enforce payment of the above fees where the employee can prove circumstances beyond their reasonable control have led to the fee being repayable.

Time	Percentage of Fees recoverable
1. During course/training	Up to 100% of all fees incurred
2. Up to 6 months from date of completion	Up to 100% of all fees incurred
3. Up to 12 months from date of completion	Up to 50% of all fees incurred
4. Up to 18 months from date of completion	Up to 25% of all fees incurred
5. Up to 2 years from date of completion	Up to 10% of all fees incurred
6. More than 2 years from the date of completion	No recovery

Where it is possible that fees become repayable, the employee hereby authorises deductions of the above from his/her salary. If the employee is unable to repay the fees, the Trust will meet with the employee with the aim of mutually agreeing a reasonable and appropriate course of action.

NAME:

COURSE

NAME:

Sponsored Learning Start Date:

End Date:

The cost of completing the course, including associated fees and expenses, and gaining the qualification is:

Leave Requirements (Number of days in total and reasons why):

I agree to the terms and conditions of this Agreement as detailed above:

Employee signature:

Date:

Manager signature:

Date:

CEO signature:

Date: