

Policy on staff training and development

Date approved by the Management Committee
Latest review date

December 2022
December 2026

1. Introduction

- 1.1 The Association is committed to having well-trained staff and ensuring there is every opportunity for ongoing training and development for all staff. Not only is the Association committed to providing training for specific jobs, but also to giving staff the opportunity to undertake training or courses of study that will lead to personal development to the benefit of the organisation.
- 1.2 This policy outlines the steps that the Association will take to ensure that staff undertake appropriate and effective training.
- 1.3 The Association is equally committed to ensuring a well-trained Management Committee. This is done via annual (in-house) and biennial (via DRUMCOG) skills analyses and an appropriate follow-up training programme. Committee training is discussed in a separate policy document.

2. Legal, regulatory and best practice regulatory framework

- 2.1 There are no specific legal requirements surrounding training and development; membership of professional bodies may require continuous professional development (CPD) through training and other vehicles, but the Association does not have any posts where qualifications are a legal requirement.
- 2.2 Standard 6 of the Standards of Governance and Financial Management requires the Committee and senior officers to “have the skills and knowledge they need to be effective”. There is also a regulatory expectation and it is good practice that this be extended to all of the Association’s staff.

3. Equality and Human rights

- 3.1 The Association’s equality and human rights policy, which was approved by the Committee in April 2021, outlines our commitment to promote a zero tolerance to unfair treatment or discrimination to any person or group of persons, particularly on the basis of any of the protected

characteristics¹. This includes ensuring that everyone has equal access to information and services and, to this end, the Association will make available a copy of this document in a range of alternative formats including large print, translated into another language or by data transferred to voice.

- 3.2 We are also aware of the potential for policies to inadvertently discriminate against an individual or group of individuals. To help tackle this and ensure that it does not occur, best practice suggests that organisations carry out Equality Impact Assessments to help identify any part of a policy that may be discriminatory so that this can be addressed (please see section 5 of the equality and human rights for more information).

4. Implementing the policy

- 4.1 We will achieve the objectives of this policy in a number of ways, some of which are outlined in the remainder of this section.

- 4.2 The Association will:

- a) Provide personal specifications for every post
- b) Provide competence-based job descriptions
- c) Provide comprehensive induction training for new staff (Appendix 1)
- d) Assess training needs on an ad hoc basis as part of the monthly-one to-one meetings and, to ensure that the training and development undertaken is effective and that nothing is “missed”, there will be an annual review specifically for staff training
- e) Assess training needs as the organisation changes or new legal and regulatory requirements come into effect
- f) Ensure that all staff are aware of the Association’s positive approach to further education and modular courses (Appendix 2 contains additional information on further education)

- 4.2 The above will be assessed and monitored as follows:

- a) Through the monthly one-to one-meetings on an ad hoc basis and more formally at the annual training meeting

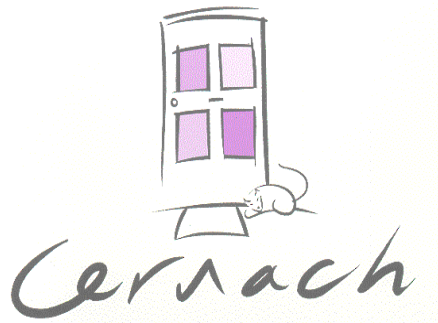
¹ The Equality Act 2010 identifies the “protected characteristics” as age, disability, marriage and civil partnership, race, religion or belief, gender, gender reassignment and sexual orientation.

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- b) All staff will be required to complete post-training evaluation. This will be collated by the Corporate Services Assistant
 - c) The Committee will agree an annual training budget
 - d) The Assurance sub-Committee will receive an annual report of spend against budget and all training undertaken
- 4.3 It will be the role of the line manager to oversee and agree an individual staff member's training plan; ultimate responsibility for ensuring that staff participate in appropriate training will fall with the line manager. In practice, however, staff also have responsibility for highlighting courses that may be useful for their current posts or career development.
- 4.4 Approval to reserve places on training courses will rest with the line manager. Once approval has been given, the staff member will go ahead and make the reservation. In addition to the potential benefits of the course under discussion, the line manager will also check that the course can be accommodated within the agreed budget (via the spend tracker).
- 4.5 Approval for a staff member to undertake a course of study will be given by the Assurance sub-Committee following a recommendation from the Director.

5. Policy review

- 5.1 This policy will be reviewed every four years, or earlier in line with legal, regulatory or best practice requirements. The next review will take place in or before December 2026.



Staff induction programme

Employee name:

Job title:

Department:

Start date:

Induction Programme

This induction programme has been designed to:

- Provide you with the procedural information necessary to enable you to start work
- Provide you with the information you need to know in order for you to do your job effectively
- Provide you with an overview of the Association, its purpose and direction
- Help guide you through your first days, weeks and months
- Introduce you to the different sections and explain how they contribute to the Association's objectives
- Help you understand how your own job fits into the overall scheme of things
- Explain the Association's performance review system, compliance with the Scottish Social Housing Charter and compliance with the Regulatory Standards of Governance and Financial Management

A sample induction programme is attached. This will require to be amended to reflect the requirements of the post

Appendix 1

Induction programme

The table contains details of the planned induction programme. We have tried to be accurate in the timings but, in reality, some sessions will run over whilst others will take less time than we have set aside. There are therefore likely to be ad hoc changes to the programme as the week progresses.

We have included time for lunch each day and, on some days, there are also short morning and/or afternoon breaks. On the days when no morning/afternoon break has been specifically scheduled, we will discuss this as we go through the programme and ensure that breaks are available as desired.

Items	Time slot	Learning outcome	Documentation	Person(s) Resp	Date and initials
Day one					
<ul style="list-style-type: none"> Welcome Meet staff Office tour CHA history and structure CHA governance Stock tour Username and account details (system, SDM, Cirrus, etc) 	10.00am – 12.30pm	Basic level of familiarity with CHA	Issue induction programme	Director Depute Director Finance Officer	
<ul style="list-style-type: none"> Health & Safety 	2.00pm – 2.45pm	Knowledge of H&S, CHA's commitment to promoting a good approach to H&S matters and introduction to H&S procedures	Health & Safety manual, accident book, first aid box, first aider and risk assessments, fire alarm demonstration, panic alarm, H&S visitors' book and details of office mobiles. Any other relevant H&S matters	Finance Officer (H&S Administrator)	
<ul style="list-style-type: none"> Complete personnel records 	2.45pm – 3.30pm	To review/complete all personnel	Receipt of TOIL/annual leave card, Kelio card,	Director	

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Items	Time slot	Learning outcome	Documentation	Person(s) Resp	Date and initials
<ul style="list-style-type: none"> Finalise arrangements for uniform Explain “dress down Friday” 		documentation, including salary payment arrangements	name badge and office keys. Details of SHAPS	Depute Director	
<ul style="list-style-type: none"> Shadowing 	3.30pm – 4.30pm	To observe CHA customer care approach by shadowing other staff member		HOs/MO/MAO	
Day two					
<ul style="list-style-type: none"> Weekly staff meeting 	9.00am – 10.00am	To observe/participate in staff meeting		All staff	
<ul style="list-style-type: none"> Recap/questions/spill over from day one 	10.00am – 10.30am	To clarify any matters from day one	As required	Director	
<ul style="list-style-type: none"> Code of Conduct for staff Data Protection and Information Security Equality and diversity policy Payments and benefits policy Whistleblowing policy Confidentiality 	10.30am – 11.15am	To become familiar with the high standards expected in relation to probity, respect, confidentiality and commitment to promoting equality and diversity	Relevant policies	Director	
<ul style="list-style-type: none"> Shadowing reception 	11.30am – 12.30pm	To become familiar with CHA approach to dealing with customers		HOs/MAO	
<ul style="list-style-type: none"> Training policy One-to-ones Absence and attendance management 	2.00pm – 3.30pm	To have an understanding of CHA's approach to supporting its people and	Relevant policies	Depute Director	

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Items	Time slot	Learning outcome	Documentation	Person(s) Resp	Date and initials
<ul style="list-style-type: none"> Stress management Annual leave/flexi/TOIL procedures Aggression and violence at work Dignity at work 		promotion of respect at all times. To be able to maintain staff training records and evaluations up to date			
<ul style="list-style-type: none"> Working at reception 	3.45pm – 4.30pm	On-the-job training		HOs/MAO	
Day three					
<ul style="list-style-type: none"> Attend staff training 	10.00am – 11.30am	Awareness of work of housing and social care joint integration team	Any materials distributed at session	GCC officers	
<ul style="list-style-type: none"> Working at reception 	am after training	On-the-job training		HO/MAO	
<ul style="list-style-type: none"> Recap/questions/spill over from day two 	2.00pm – 2.30pm	To clarify any matters from day two	As required	Director	
<ul style="list-style-type: none"> Customer service standards Complaints handling 	2.30pm – 3.30pm	To understand CHA customer service standards and complaints handling and the CSA's role in monitoring these areas	Relevant policies and procedures. Cirrus database	Depute Director	
<ul style="list-style-type: none"> Ordering of goods and services 	2.00pm – 3.00pm	How to place a stationery order and explanation of delegated authorities authorisation and expenditure limits	Financial procedures and regulations Stationery catalogues	Finance Officer	

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Items	Time slot	Learning outcome	Documentation	Person(s) Resp	Date and initials
Day four					
• Recap/questions/spill over from day three	9.30am – 10.00am	To clarify any matters from day three	As required	Director	
• Paper filing system	10.00am – 12.00noon	Explanation of the various paper filing systems that exist within the office		All staff	
• Electronic filing system	12.00noon – 12.30pm	Explanation of system and opportunity to explore same	Access to U:\	Director	
• Working at reception	1.30pm – 3.00pm	On-the-job training		HO/MAO	
• Preparing for meetings	3.00pm – 3.30pm	Preparing boardroom and catering		Housing Officer (LM)	
• Purchase of tea, coffee, other drinks, milk, sugar, etc for staff and for board room	3.30pm – 4.00pm			Housing Officer (LM)	
• Frank mail and take to post office	4.00pm – 4.45pm	To process outgoing mail		Housing Officer (LM)	
Day five					
• Recap/questions/spill over from day four	9.00am – 9.30am	To clarify any matters from day four	As required	Director	
• Working at reception	9.30am – 10.30am	On-the-job training		HOs/MAO	

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Items	Time slot	Learning outcome	Documentation	Person(s) Resp	Date and initials
<ul style="list-style-type: none"> • Open, log and distribute mail • Check admin@ email • Work at reception 	10.30am – 12.30pm	To process incoming mail	Incoming mail, date stamp and mail book	HOs/MAO	
<ul style="list-style-type: none"> • Discussion on any other issues emerging during induction 	2.00pm – 2.30pm	To identify any areas requiring further clarification		Director (other staff as required)	
<ul style="list-style-type: none"> • Discussion on aide memoire sheet 	2.30pm – 3.00pm		Aide memoire sheet	Director	
<ul style="list-style-type: none"> • Working at reception 	Rest of pm	On-the-job training		HOs/MAO	
Other induction tasks					
<ul style="list-style-type: none"> • Attend Management Committee meeting 	27 Apr 16 6.00pm – 8.00pm	To observe business at a Committee meeting	Committee papers	Director	

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Induction programme – self-test questions

(to be completed after the end of the relevant section)

Please consider each of the following questions. Where you don't know or are unsure of the answer, please discuss this with your line manager or another member of staff.

At the end of Week 1

- 1 What is the current Management Committee structure?
- 2 What rules does the Association operate under?
- 3 What are the procedures surrounding flexi time and operation of flexi time and TOIL?
- 4 Can you confirm that you have been issued with the Information Security Policy and Data Protection Policy?
- 5 Are you familiar with the appropriate equipment you will be operating and how to obtain proper procedures on operation?

At the end of Week 2

- 1 Are you able to describe your role within the Association?
- 2 Are you able to create and review work orders?
- 3 Are you able to process invoices received at the office?
- 4 Have you received H&S induction and VDU risk assessment?
- 5 Are you familiar with the location of the Association's stock?

At the end of Week 3

- 1 What feedback mechanism does the Association have to assess your job performance and identify areas for improvement?
- 2 How will you inform your line manager how the learning at a recent training event has helped you?
- 3 Do you know what your level of financial authority is?

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Induction Checklist at end of week three

The new staff member should tick to confirm understanding and, where necessary, seek clarification from the Director at the review meeting

Organisational information	Person responsible	
History of the Association	Director	<input type="checkbox"/>
Organisational structure	Director	<input type="checkbox"/>
Committee procedures and decision-making process	Director	<input type="checkbox"/>
The Scottish Housing Regulator and the regulatory framework	Director	<input type="checkbox"/>
The Scottish Social Housing Charter	Depute Director	<input type="checkbox"/>
Affiliated bodies (EVH, SFHA, TIS, QEF, etc)	Director	<input type="checkbox"/>
The Association's purposes and strategic direction	Director	<input type="checkbox"/>
The Co-operation Agreement with DHC	Director	<input type="checkbox"/>
Procedural Information		
Terms and conditions of employment	Line manager	<input type="checkbox"/>
Disciplinary and grievance procedures	Line manager	<input type="checkbox"/>
Attendance management	Line manager	<input type="checkbox"/>
Recognition and reward	Line manager	<input type="checkbox"/>
Whistleblowing policy	Director	<input type="checkbox"/>
Code of Conduct for staff	Line manager	<input type="checkbox"/>
Personal relationships at work	Line manager	<input type="checkbox"/>
Dress code and <i>Dress Down Fridays</i>	Line manager	<input type="checkbox"/>
Education, training and performance review	Line manager	<input type="checkbox"/>
Equality and diversity	Director	<input type="checkbox"/>
Customer service	Depute Director	<input type="checkbox"/>
Staff meetings	Line manager	<input type="checkbox"/>
Health and safety policy and procedures (manual)	H&S administrator	<input type="checkbox"/>
First aid, personal safety and risk assessment	H&S administrator	<input type="checkbox"/>
Personal information and welfare		

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Procedures on entering & leaving premises	Depute Director	<input type="checkbox"/>
Completion of medical and emergency contact information	Line manager	<input type="checkbox"/>
Operation of flexi/TOIL/annual leave and systems of recording	Line manager	<input type="checkbox"/>
SHAPS and auto enrolment	Finance Officer	<input type="checkbox"/>
Salary and expenses payment arrangements	Finance Officer	<input type="checkbox"/>
Uniforms	Finance Officer	<input type="checkbox"/>
Child care vouchers	Finance Officer	<input type="checkbox"/>
Job information		
Department function as it relates to the rest of the organisation	Director	<input type="checkbox"/>
Servicing the Committee/sub-Committee	Director	<input type="checkbox"/>
Job role and key duties	Line manager	<input type="checkbox"/>
Performance targets	Line manager	<input type="checkbox"/>
Working groups	Line manager	<input type="checkbox"/>
Communication channels	Line manager	<input type="checkbox"/>
Ordering of stationery, etc	CSA	<input type="checkbox"/>
Mobile phone	Line manager	<input type="checkbox"/>

Induction evaluation

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This questionnaire should be completed and returned to the Director at the induction evaluation meeting to be held at the end of the three-month probationary period.

Name of employee:	Department:
Job title:	Start date:
<p>The Association wishes to ensure that its employees are given a good start in their new job. The purpose of this short questionnaire is to assess the effectiveness of our induction programme in introducing you to the organisation.</p> <p>We are also interested to hear your ideas about any improvements we could make to our induction programme.</p> <p>The boxes will expand as you type so please feel free to make your responses as long or short as you wish.</p> <p>Thank you for your contribution.</p>	
1. How effectively do you feel you induction programme introduced you to the organisation and the requirements of the job?	
2. In what way did it help you to understand your role within the Association?	
3. In what way has the induction programme helped your job performance during the first few weeks?	
4. Which part(s) of the programme did you find particularly valuable and why?	
5. Which part(s) of the programme did you find least valuable and why?	

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6. What have you achieved in the first three months and what would you like to achieve in the year ahead?
7. Are there any other comments you would like to make?

Signed:

Date:

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Appendix 2- Information about further education

1. Introduction

- 1.1 Cernach Housing Association is fully committed to the development of all members of staff. Staff will be aware of how their work as an individual contributes to the achievement of overall objectives through a number of different mechanisms, such as contributing to the internal management plan, the asset management plan, participation in working groups, attendance at Committee/sub-Committee meetings, individual team meetings and full staff meetings.
- 1.2 This appendix outlines the Association's policy on supporting further education and outlines some important procedural considerations.

2. Day release

- 2.1 Approval for attendance on a day release course will rest with the Staffing, General Purposes and Audit sub-Committee. Should a staff member wish to undertake a day release course, s/he should make a formal request to their line manager in the first instance.
- 2.2 There must be a clear business case made in support of undertaking the course and it must be relevant to the staff member's current post or another post that they could conceivably undertake within the Association.
- 2.3 The line manager must be satisfied that the absence required to attend classes will not adversely affect the Association's day-to-day operations.
- 2.4 Where a request for further education support is granted, the Association will cover the cost of the course fees, travel/subsistence and any specialist equipment required (in the case of specialist equipment, this will remain in the ownership of the Association).
- 2.5 The Association will also allow paid leave for attendance on day release courses and for attendance at examinations, plus, where it is a mandatory element in the course, up to one week in any year for attendance on a block study course. Paid study leave of one day per examination will also be allowed.

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- 2.6 The Association will meet the cost of any professional membership required in order to undertake the course.

3. Non-day release

- 3.1 Approval for undertaking a non-day release course (for example, a correspondence course or one where classes are outwith the staff member's normal working hours) will rest with the Staffing, General Purposes and Audit sub-Committee. Should a staff member wish to undertake a non-day release course, s/he should make a formal request to their line manager in the first instance.
- 3.2 There must be a clear business case made in support of undertaking the course and it must be relevant to the staff member's current post or another post that they could conceivably undertake within the Association.
- 3.3 As with a day release course, the Association will cover the course fees, travel/subsistence and any specialist equipment required (in the case of specialist equipment, this will remain in the ownership of the Association).
- 3.4 The Association will allow paid leave where required examinations are scheduled to take place during the staff member's normal working hours. Paid study leave of one day per examination will also be allowed.
- 3.5 The Association will meet the cost of any professional membership required in order to undertake the course.

4. Resits

- 4.1 The Association will pay the fee for one resit but the staff member will be required to use time taken from annual leave, flexi or TOIL. Thereafter, fees will become the responsibility of the staff member and the time taken off can be from annual leave, flexi or TOIL.

5. Mentors

- 5.1 All employees studying for a recognised qualification will have regular meetings with a designated person within the Association who will monitor progress and provide guidance to help the student to complete the course.

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6. Claw back of course and examination fees

6.1 Where a staff member resigns from their post with Cernach Housing Association during the year for which financial assistance was granted or within a year of completion of the course, s/he will be required to repay up to 100% of the course and examination fees paid by the Association for their most recent year of study.

6.2 This will be tiered as follows:

- a) Leaving within three months of completion, repayment in full will be required by the Association
- b) Leaving within three to six months, 75% of the cost will require to be repaid
- c) Leaving within six to nine months, 50% of the cost will require to be repaid
- d) Leaving within nine to twelve months, 25% of the cost will require to be repaid

6.3 The payment due will be deducted from the final salary payment or, subject to a signed agreement from the staff member, within three months of the employee's official leaving date. Where the sum owed is greater than the final salary payment, the staff member will be required to pay the full amount due within three months of his/her official leaving date.

6.4 Courses not completed

6.4.1 Where a course has not been completed, repayment may be required. This will depend on the circumstances surrounding why the course was not completed and the decision will rest with the Management Committee.

6.4.2 It is not possible to cover all eventualities but the following provides guidance. Repayment will not be sought where the staff member has withdrawn due to:

- Health issues
- Family matters
- Redundancy

Or

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- Where the individual has been asked to withdraw from the course due to inability to make sufficient progress

6.4.3 The purpose of claw back for non-completion of a course is not intended to be punitive. As a general rule of thumb, the Association will not seek repayment where non-completion of the course is due to matters outwith the staff member's control.

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Undertaking to repay course and/or examination fees

I,..... , in consideration of having been funded to undertake an approved course of study, do hereby agree and undertake to remain in the service of Cernach Housing Association for a period of 12 months following the completion of my course.

In the event of my voluntarily leaving the Association (or being summarily dismissed before the expiry of the said minimum period), or of my terminating my studies before completing the course, I undertake to refund to my employer an amount proportional to the unexpired portion of the contracted minimum period of service calculated on the basis of all monies loaned to me in respect of the said course of studies by my employer. This is outlined in Appendix 2, section 6.2 of the training and development policy, a copy of which I confirm I have received.

I hereby agree that such sums as may be refundable by me in respect of the above undertaking may be deducted by my employer from salary or other payments due to me under my contract of employment.

Signed

Date

Cernach Housing Association Equality Impact Assessment Tool




Name of the policy / proposal to be assessed	Staff training and development policy	Is this a new policy / proposal or a revision?	Revision
Person(s) responsible for the assessment	L Crawford		
1. Briefly describe the aims, objectives and purpose of the policy / proposal	To aim of the policy is to set out the Associations approach to staff training and development. The policy encourage staff to engage in training that will lead to personal development to the benefit of the organisation. The policy contributes to our strategic goal <i>'to invest in and develop our people to ensure that the Association is an employer of choice.</i>		
2. Who is intended to benefit from the policy / proposal? <i>(e.g. applicants, tenants, staff, contractors)</i>	Staff		
3. What outcomes are wanted from this policy / proposal ? <i>(e.g. the benefits to customers)</i>	To enhance employee performance, boost employee productivity, reduce employee turnover and improve company culture. It also compliments succession planning and allows us to prepare for internal promotions if required.		

4. Which **protected characteristics** could be **affected** by the proposal? (*tick all that apply*)

- Age Disability Marriage & Civil Partnership Pregnancy/Maternity Race
 Religion or Belief Gender Gender Reassignment Sexual Orientation

5. If the policy / proposal is not relevant to any of the **protected characteristics** listed in part 4, state why and end the process here.
After careful consideration, there are no known elements of this policy that would impact any of the 9 protected characteristics.

	Positive impact(s)	Negative impact(s)
6. Describe the likely positive or negative impact(s) the policy / proposal could have on the groups identified in part 4		
7. What actions are required to address the impacts arising from this assessment? (<i>This might include; collecting additional data, putting monitoring in place, specific actions to mitigate negative impacts</i>).		

Signed:  Job title: Corporate Services Officer

Date the Equality Impact Assessment was completed: 18/11/22