LEARNING AND DEVELOPMENT POLICY (L&D)

Approved On	February 2026
Date of Next Review	February 2029

1. Introduction

West of Scotland Housing Association Group (WSHA) is a dynamic and people-friendly organisation which strives to support its employees' development, at the same time ensuring that such development is relevant and supports the business. It is acknowledged that learning and development are best self driven by individuals, although management and the business policy have a role to play in encouraging individuals to take the initiative.

The approach to staff training and development is two fold; firstly we ensure that all staff receive the learning that they require to carry out their role and we have identified mandatory training for each role. The other element of our approach is to provide development for staff in respect of their own role, career development and to support the achievement of the business priorities of the Association.

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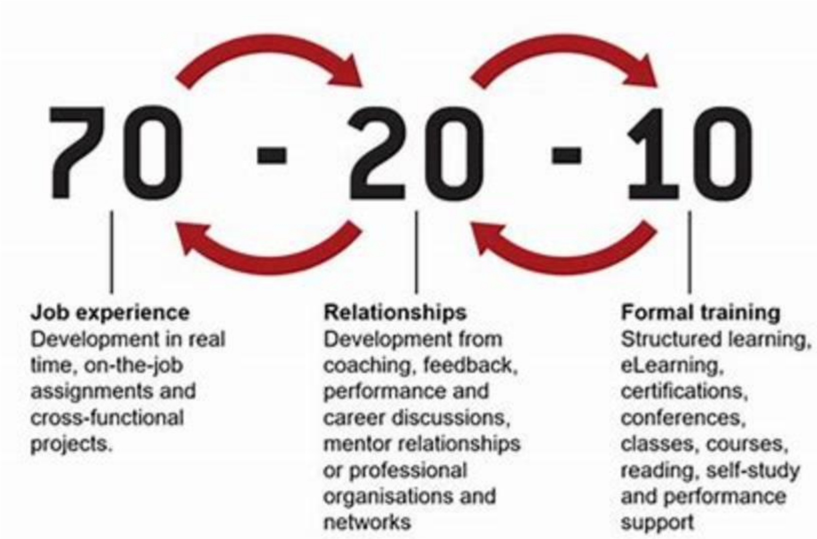
Our overall approach to learning and development is the 70/20/10 model which is outlined below:



Examples of each learning type

What do the different types of learning actually look like? Here are some examples:

70% on-the-job learning

- Developing sharper instincts through increasing experience
- Improving automatic efficiency at a task from repeated practice
- Challenging assignments, stretch projects and dealing with edge cases that require taking a new approach
- Fixing mistakes and problem-solving
- Participating in new initiatives or change efforts
- Discovering a new tool or process and putting it to use

20% learning from others

- Mentoring and coaching
- Peer feedback and work reviews

- Observing expert colleagues in action
- Employees documenting their experiences and processes

10% formal learning

- Live training sessions and workshops
- Asynchronous eLearning modules
- Conferences and seminars
- Reading articles and books

2. Policy principles

WSHA's Learning and Development Policy aims to:

- Ensure fairness, clarity and consistency for all West of Scotland Housing Association Groups staff members.
- Provide a framework for ensuring that the business as well as employees benefit from development activities undertaken.
- Assist West of Scotland Housing Association's staff members with their continuous professional development.
- Assist a development discussion between staff and their line managers during annual reviews.
- Promote considering alternative methods of learning and development to attending courses and conferences.
- Promote a culture of sharing knowledge and skills with work colleagues.

Training Parameters

This policy introduces clear parameters for staff and management to follow in terms of the expected and allowable level of personal development**. A minimum of 3 full days and a maximum of 9 full days per annum** (pro rata for part time staff) is the norm adopted by WSHA. These levels will not be breached except in exceptional circumstances and with the prior agreement of the line manager.

What counts towards training and self-development

All training and development activities, including conferences courses, self-learning, job shadowing, reading and self-guided learning, attending sessions run by WSHA employees, etc will count. Staff are encouraged to consider various methods of training, in light of their suitability for the purpose and to suit individual preferences. Health and Safety and "how to" (operating new equipment etc) sessions will not be counted as personal development for this policy.

Training Budget

Applications for training/conference fees to be subsidised fully or partially by WSHA will be subject to availability of funds in the training budget.

The Role of the Line Manager

It is acknowledged that personal development is self-driven however we also recognise a motivational role of the line managers who should encourage and support their staff to take the initiative. Employees are required to discuss with their line manager how the training event they wish to undertake would benefit the business. It may be that the training would benefit other employees or individual employees, increasing their efficiency and thus making them more valuable to the business. The proposed staff development form will prompt employees to think in these terms when planning their development.

Sharing the knowledge

It is acknowledged that there is a lot of specialised knowledge held amongst WSHA***'s*** employees that could better benefit employees, and the business were it to be shared. This policy aims to encourage employees to share their knowledge and skills with each other. Each employee should aim **to provide employees with approximately 1 full day** of their time each year to share knowledge for the greater benefit of the workgroup. Senior staff will be expected to do more than the minimum. Such activities should be semi formal (e.g. not just sending round a paper picked up on travels), structured and prepared.

Gaining diverse knowledge and skills from employees can also effectively help in enhancing people's career prospects and employability.

Although all staff will be encouraged to attend the session run by their employees, such attendance will be voluntary. This is to reflect the fact that some of our development gains may be of little interest or relevance to employees. The demands of the business at any given time must also be accounted for.

Recording Training

All staff should keep their own simple record of WSHA supported training/development tackled throughout the year. Forms are provided to complement this policy. This will also be used by the relevant appraiser in monitoring and approving requests for training throughout the course of the year. Employees are encouraged to discuss their development with their line managers regularly throughout the year, rather than leaving such discussions to the appraisal meetings only.

The Annual Review Process

In order to prompt a meaningful discussion between the employee and their line manager as well as to help achieving the targets set by this policy, the targets for training and development activities have been incorporated into *the* standard annual review form. Line managers and employees should work together in achieving this level of focussed development – all of which should be driven by the appraisal system, which in turn should heavily reflect business priorities.

Coaching

Coaching is the highest form of internal training/support. It should not be discounted but it should not be entered into glibly. Where contemplated it should be accompanied by a proper plan and expected outcomes and is best led by someone other than the staff member's direct line manager (though it is subject to the line manager's approval).

General Data Protection Regulations

The organisation will treat your personal data in line with our obligations under the current data protection regulations and our own [insert name of policy or procedure]. Information regarding how your data will be used and the basis for processing your data is provided in WSHA*'s* employee privacy notice.

3. Responsibilities

The Association fully supports the L&D of its staff by:

- Providing resources such as finance, equipment, time and opportunities to ensure that everyone has the correct skills and knowledge required to carry out their roles.

- Ensuring that all line managers are aware of their role with regard to supporting L&D activity, and that they have the skills and knowledge required to identify L&D needs and to follow through with the implementation of that L&D for all individuals.

- Encouraging and supporting individuals to pursue business relevant development over and above their job role and to give consideration to career development.

- Offering L&D on a fair basis to all employees and ensuring that no individual receives less favourable treatment or consideration in relation to L&D on the grounds of their gender, sexual orientation, racial group, marital status, disability, age, religion or religious beliefs, or any other unlawful criteria or circumstances.

3.1 Corporate Management Team are responsible for:

- Identifying corporate learning and development needs, in conjunction with the HR Team, in line with the needs of the organisation and the business planning process.
- Agreeing the annual budget for L&D following consideration of the draft annual L&D plan.
- Ensuring that staff are equipped to comply with mandatory requirements laid down by statute e.g. Health and Safety requirements
- Considering requests for further education qualifications and what, if any, part of the overall L&D budget or resource should be apportioned to the provision of such.
- Reviewing the evaluation of L&D annually to ensure that any L&D activity has met its original objectives and has had an impact on the performance or compliance of the Association.

3.2 Managers are responsible for:

- Ensuring their staff members are provided and supported with a comprehensive and structured induction plan at the commencement of their employment with WSHA. This should be created and delivered with support from the HR team
- Engaging in formal personal development planning discussions.
- Ensuring the outcomes of these discussions are clearly expressed as L&D needs and are prioritised on a Personal Development Plan (PDP)

- Identifying L&D needs, at the earliest possible opportunity, that are closely linked to our vision and values, our statutory obligations, wider organisational goals, team objectives and the individual's performance objectives.
- Discussing and agreeing L&D activity with all their staff at induction, probation, monthly one to one meetings and regular performance and development reviews.
- Considering ad-hoc L&D requests when individual or team learning needs arise out with the annual appraisal process.
- Discussing the individual's career aspirations and including any reasonable aspirational learning activities on the Annual Review Form. Aspirational learning may include professional qualifications or on-the-job learning to support them in taking on more responsibility or moving to a bigger role.
- Ensure that HR are notified of any external training attended out with the Internal Training Programme
- Managing individual expectations to ensure there are appropriate resources and/or time to enable the activities detailed on the PDP to take place.
- Ensuring that agreed L&D takes place and is used effectively and efficiently in the workplace.
- Effectively sharing knowledge from investment in L&D activities, throughout the Association as appropriate.
- Ensuring with the HR team that all L&D activity has sufficient budget provision prior to approval.
- Evaluating the L&D that has taken place, following an activity, by having a discussion with the individual or team.
- Assisting the Association to evaluate the impact of the L&D at organisational, team and individual level as appropriate.

3.3 Employees are responsible for:

- Ensuring that they give thought, prior to their induction, probation, one to one monthly meetings and performance and development appraisals reviews, to any L&D they think might assist them to meet individual, team and organisational objectives, and the best and most cost effective way to meet these needs.
- Ensuring that their personal development plan is a current, specific and actionable record of the agreed areas for L&D.
- Reviewing progress against their PDP.
- Making sure that a continuous conversation throughout the year takes place with their line manager to identify appropriate L&D opportunities out with the appraisal process and to discuss and agree these fully with their manager.
- Ensuring that any agreed L&D activity takes place within the agreed timescales.

- Attending all L&D (mandatory and developmental) that has been arranged (whether internal or external), or to give reasonable notice to cancel. Reasons for cancellation must be discussed and agreed with their line manager. Where applicable, the employee must take all reasonable steps to ensure that cancellation fees are not incurred.
- Raising concerns they may have, with their line manager, over their ability to apply the new learning they have acquired.
- Utilising the learning acquired through L&D activities to the benefit of the organisation.
- Sharing their L&D with colleagues (as appropriate).
- Assisting the WSHA to fully evaluate the L&D by providing information and open and honest feedback.

3.4 HR Team are responsible for:

- Managing the associated budget headings for all L&D and activities.
- Ensuring that all staff are provided with a comprehensive and structured induction plan at the commencement of their employment with the Association. This should be created and delivered in conjunction with the employee's line manager.
- Ensuring the policy and procedures are understood across the organisation.
- Regularly reviewing this policy, in conjunction with Corporate Management Team, in line with the needs of the organisation and the corporate planning process.
- Ensuring that all staff have induction, probation and annual reviews.
- Develop an annual Learning & Development Programme based on business priorities for the year ahead and analysis of staff annual reviews.
- Ensuring that CMT agree the L&D plan and the resources required to deliver the final version of the plan.
- Supporting the WSHA to explore a range of L&D interventions that support the business and departmental and individual needs.
- Ensuring that L&D is evaluated at individual, team and organisational level to guarantee that it meets the original objectives of the learning, and that it improves the performance of individuals, teams and the WSHA Group.
- Providing CMT and Staffing Sub Committee with an annual L&D evaluation report on the effectiveness of all L&D activity.
- Maintaining records of any L&D undertaken, both general and vocational, to ensure that there is consistency and fairness applied to all decisions made with regard to requests for training.
- Supporting managers to comply with mandatory training requirements.

4. Learning & Development Activities and Resources

The Association will meet the L&D needs of employees in the following ways:

4.1 Training budget

Applications for training/conference fees to be subsidised fully or partially by WSHA will be subject to availability of funds in the training budget held by the Director of Corporate Services.

4.2 Induction

WSHA recognises that all new employees and all staff who are promoted or transferred will require adjustment in their new roles. By providing a comprehensive induction programme, WSHA aims to give the required support to those individuals through tailored induction, as well as addressing any individual L&D needs that have been identified through the recruitment and selection process and via discussion with their line manager.

Induction ensures that all new starters understand:

- the history of the Association
- the WSHA Group Business Plan and Subsidiary Business Plans where appropriate
- the reporting structures and the accountabilities within the Association
- the work of the different roles within the Association
- the culture and values of the Association
- the goals and the aspirations of the Association
- how their role fits in with the team and the Association as a whole
- their objectives for the next period (up until the next formal review, which may be a probation period.
- the policies, procedures and processes that govern the Association
- the content of Terms and Conditions of Employment
- how their L&D needs will be addressed

Induction is also viewed as a valuable opportunity to establish networks and meet other colleagues both internal and external to the Association.

Induction also ensures that those staff who have been promoted or transferred understand:

- the aim of the new role and the responsibilities
- their job role and how it fits in with the team and the Association as a whole
- their objectives for the rest of the period
- how their L&D needs will be addressed.

4.3 L&D Activities

We will use different approaches in respect of L&D activity:

The Association will support mandatory training where legislation requires an organisation to fulfil legal obligations. We have also identified mandatory training for each role.

Consideration will be given to L&D activity that equips staff for the efficient performance of present or foreseeable future responsibilities. This may take a variety of forms including in line with our approach to learning and development. These activities include:

- planned L&D activity
- learning a new task
- Discovery of a new tool and implementing it
- Problem solving
- professional CPD
- development programmes
- conferences
- briefing sessions and seminars
- secondment opportunities
- reading/podcasts
- coaching from colleagues or managers
- Peer discussions
- job shadowing
- e- learning and development
- continuing professional development
- organisational working groups/projects

All L&D activity should be identified and agreed with line managers.

4.4 Vocational Training / Further Education / Professional Qualifications

This type of L&D activity (e.g. SVQs, degree courses, diploma courses, etc.) enables employees to acquire a recognised qualification directly related to present or foreseeable future responsibilities. Responsibility for the authorisation of this type of learning falls with the Corporate Management Team. The Corporate Management Team will base any decisions in respect of funding for qualifications on completion of a further education matrix which can be found here. This should be completed with the line manager and submitted to the Director of Corporate Services who will take to CMT for approval.

The Association will support individuals who wish to pursue professional qualifications, based on the following criteria:

- The request has been made via the annual review process and has been approved by CMT and supported by their Director and line manager in advance of any formal course booking being made.

- The need for this development can be met from the relevant budget (i.e. funds availability).

- On-going financial support must be requested and authorised on an annual basis via the annual reviewprocess. Individuals will be made aware that funding cannot be guaranteed for the duration of study.

- The individual must have been employed by the Association for at least 12 months.

- The course of study directly links to their Appraisal review and will support them in their role within the Association.

- The performance and conduct of the individual is of a consistently high standard. For example they achieve their objectives consistently and their record of attendance record is exemplary.

- Their attitude and approach is consistent with the Association's values.

4.5 Funding for Vocational Courses

This will be a matter for CMT ultimately and at the discretion of the Departmental Director in conjunction with the HR team, and for appropriate courses (such as those leading to technical or professional qualifications), up to 100% financial assistance may be awarded for approved costs and fees. Fees will be paid directly to the educational body/institution.

Rules applicable to the above funding are as follows:

- The fees paid are to be regarded as a loan. The loan will be written off 12 months following completion of the relevant course / final examination. The Association retains the right to require the employee to refund either full or a proportion of the cost of fees where the individual voluntarily leaves their employment within those 12 months, or where the individual or the training institution prematurely terminates their course or where the individual is dismissed summarily from employment. Individuals whose fees are paid will be required to sign an undertaking to repay their fees in the event that they leave their employment within 12 months of the end of the course.

- Withdrawal from a course will result in repayment of the fees paid on the basis of the above, unless the individual, on presentation of written justification, has obtained the agreement of their Director to withdrawal, or the employee has had to withdraw due to long term sickness, maternity leave or redundancy.

- Day release courses may be authorised where the course is directly applicable to the employee's role. This is subject to staffing levels and the endorsement of the employee's line manager.

- Up to 100% funding may be given for courses outwith office hours e.g. evening courses/classes, distance learning, where the course is directly applicable to the employee's role. However, in recognition of the commitment to the course of study the individual will not be credited with time past 5pm.

4.6 Study Leave

Leave of absence with pay will be granted to individuals to enable them to sit examinations for courses approved by Departmental Directors. Such leave with pay will include the previous half day (where the examination itself lasts half a day) or the previous day (where the examination is over a full day). Individuals who are on continuous assessment courses will be given up to 2 day's leave with pay each course year to complete necessary course-works, assignments, etc.

Requests by employees to take leave around the time of examinations will be considered sympathetically.

Leave of absence with pay will be granted to individuals for attendance at any subsequent Graduation ceremony.

5. Professional Membership Fees

The Association will reimburse annual fees paid by employees for membership of professional institutions subject to the following criteria:

- Membership must be directly relevant to the requirements of the post and the work of the Association.

- Only one set of fees will be reimbursed where the employee is a member of more than one body.

- Receipts for claims are submitted to and endorsed by the HR team.

- Payment will be made in full and then included on a P11D annually.

6. Learning & Development Evaluation

The Association recognises the importance of effective evaluation. It is expected that all individuals who have been supported in their L&D will assist in the process of evaluation. The Director of Corporate Services will produce and deliver an annual report to the CMT and the Staffing Sub Committee on the effectiveness of all L&D activity.

Evaluation will take place at three intervals:

- prior to the L&D activity
- immediately following the L&D activity
- six months to one year after the L&D activity

This will be done in a number of ways:

- Pre evaluation - this includes discussion and agreement of learning at induction, probation, monthly one to one meetings, interim and annual performance reviews or ad hoc discussions. This will also take place when the L&D request form is completed.
- Post evaluation – on completion of the L&D the individual will be be issued with a survey monkey questionnaire to complete evaluating the training coursethe staff intranet under the Training tab.
- Evaluative discussion at one to one, 6 monthly and annual appraisal reviews.

From the above information, the HR Team will look at individual, team and organisational levels to ensure that the L&D is:

- meeting individual, team and organisational L&D objectives
- being used in the workplace

- beneficial in terms of business outcomes effective in terms of content and method of delivery, and where it is not, will review that particular approach.

Appendix 1 – Succession Planning Approach

1.1 Building a Talent Pool

It is important that our leadership champion and are actively involved in facilitating and supporting opportunities for career progression and that these are across the association and not just within their own area. It is noted that our leadership are best placed to determine what future skills and abilities will be required by the Association and how key roles may change due to internal and external demands.

1.2 IDENTIFICATION OF CRITICAL POSTS

One of the starting points for an approach to succession planning is to identify critical posts; these are posts whereby if the staff member currently carrying out the role was to leave the organisation, it would cause significant issues for the Association due to specific skill set or experience that person has. Once these posts have been identified, the priority will be to develop a plan in respect of succession planning to ensure we have others in the Association with the potential and opportunity, to develop the same and further skill set and knowledge.

1.3 RECORD OF SKILLS AND TALENTS

The next step in the process will be to create a record of skills and talents for all staff. This will assist us with workforce development and allow us to identify gaps in relation to skills and talents which will assist us in relation to future recruitment. Once this database has been completed and following the appraisal process this year, we will be able to identify individuals or groups who have the potential to progress to ensure they access learning and development opportunities to meet their full potential. We recognise individuals may have transferable skills, knowledge and experience obtained outside of their work role. Opportunities to develop will continued to be offered to all staff to ensure WSHA is an adaptable and high performing organisation, with a more focused approach to develop those identified with key skills. We will offer opportunities to develop potential for more senior positions using a fair, consistent and non discriminatory process.

1.4 ANNUAL REVIEW PROCESS

The key tool in respect of succession planning is our annual review process, this process enables managers to identify what learning and development is required in respect of the progression of individuals. When looking at progression development, the senior position person specification will highlight the key skills and knowledge that need to be obtained, along with expected changes that may affect the role . The one to one and annual review process should also be a way of managing performance and having honest conversations with staff about what they need to achieve before they can consider applying for a promoted post, including skill gaps and behavioural competences and if there are issues in relation to them achieving this. Staff Personal Development Plans from the appraisal process should be used to record and monitor outcomes from any learning and development and as a way of discussing progress in relation to progression in one to ones.

It is also essential that performance and progression discussions at appraisal are not just based on skills and abilities, they should also be based on the values competency framework and behaviours in line with our values.

1.5 RECRUITMENT

As detailed above, the development of a record of skills and talents will assist us with recruitment strategy regarding any gaps in relation to skills and expertise and planning for future leaders and managers. This strategy would also be in line with the workforce development plan which is based on our values and Corporate Business Plan.

1.6 RETENTION

It is also important that we try and retain talent where possible and staff retention is a key strand of our People & CultureStrategy. We are in a fortunate position in relation to the offer we have in respect of staff retention therefore it is important that we ensure staff are aware of this and improve any area where possible:

- **Salaries –** as we are members of EVH and our WSHA posts are based on EVH salary scales we are able to offer good salaries which are competitive in our sector. There is a bit more of an issue in relation to Willowacre Trust as those staff are on different salaries but we ensure that these salaries benchmark well against third sector salaries.
- **Work-life balance.** Promoting a balance between work and personal life can ensure that an employee remains happy in the workplace. We have a flexible working policy, hybrid working policy and flexi time in place.
- **Benefits –** we have other benefits in place in addition to salaries and terms and conditions. These includehealth & wellbeing activities, Employee Support and Wellbeing Service, Employee Recognition Scheme, health care plan, Cycle to Work and Tech Scheme

Ethical policy. An organisation’s ethical beliefs and practices can have a profound effect on employees. Organisations with rigorous ethical standards can benefit from an increased ability to recruit and retain the best people. We have clear values in place

- **Learning and development opportunities.** Talented employees will want to continue to learn in the workplace. If they are not sufficiently stimulated and challenged by the opportunities in your organisation then they may go elsewhere. We have a Learning and Development Policy in place and a key focus of the appraisal process is learning and development which is something we actively encourage.

1.7 MANAGING EXPECTATIONS

It is important that we manage staff expectations. We have a relatively small number of staff (118) and there is not significant turnover in relation to permanent staff and less in relation to managerial/more senior positions. We need to be clear that there are no guarantees when developing a particular staff member for a more senior role and honest in discussions that are held in one to ones and appraisals regarding individual’s ability to meet the role criteria. Also, our Recruitment Policy is clear in relation to the recruitment of permanent positions and these would be advertised externally. Any internal candidate would need to be the best candidate following a recruitment process in order to be successful in obtaining a new role. These messages need to be clear when communicating to staff in relation to succession planning either collectively or on an individual basis.

1.8 CAREER PROGRESSION

Senior positions may not arise when an individual is ready for that next step up and in the past we have lost good members of staff as result of this. We recognise that career progression is not just about promotion to a more senior position; it can be in relation to learning new skills or improving knowledge in other fields. This can be done through training, working on an organisational project, job shadowing and internal secondments. The focus of career progression is about acquiring new skills and knowledge rather than a step up in relation to post. Again it is important that this is a clear message in relation to communication to staff.

1.9 MEASURING SUCCESS

Following implementation of all of the above, it is important that we ensure that we evaluate and measure the success of our approach to succession planning and talent management. We can do this by consideringe questions below:

- Do management and leadership vacancies get filled by potential successors?
- Do vacancies get filled quickly?
- Is the data gathered useful, i.e. is it used when a vacancy arises?
- Is planned individual development actually taking place?
- What happens to potential successors as they progress through the pipeline?
- Have retention and motivation improved?