



Putting People 1st

## Learning and Development Policy

S.21

Reviewed

18 September 2024

Date next due for review:

September 2027

This policy document can be produced in various formats, for instance, in larger print or audio-format; and it can also be translated into other languages, as appropriate.

Our equality and diversity policy statement describes our key equality commitments that we use to develop all organisational services; this includes employment services and services to tenants and other customers.

Our core values include providing a fair and equal service for all people and this is detailed in our Equality and Diversity Policy. Our approach to implementing this policy will reflect that commitment.

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## Contents

1. Introduction.....	2
2. Policy and Principles .....	2
3. Policy Conditions.....	2
4. Relationship with the Learning and Development Budget .....	3
5. The Role of the Manager in the process.....	3
6. Sharing the knowledge with work colleagues .....	3
7. Recording development activities undertaken and delivered.....	3
8. The link with the appraisal process.....	4
9. Link to coaching .....	4
10. Monitoring and Review .....	4
Appendix 1 Shadowing and Mentoring Strategy.....	5
Appendix 2 Associated Forms .....	8

## 1. Introduction

Pineview 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 as well as work colleagues. 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 learning and development varies between different industries and sectors. Some "professions" require an element of Continuing Professional Development (CPD) and set a requirement in terms of days or hours per year. Often such activity will be process specific and directly required to do the job (for example, a new machine is introduced and staff need to be shown how to work it, health and safety required learning, food hygiene, manual handling and lifting etc). Such activities will not however be labelled as development for the purpose of this policy. Some occupations have semi formal standards for the level of CPD that is to be attained each year. It's worth remembering that CPD is only one aspect of learning and for the purpose of this exercise we are looking at learning in its wider meaning.

## 2. Policy and Principles

Pineview's Learning and Development Policy aims to:

- Ensure fairness, clarity and consistency for all employees.
- Provide a framework for ensuring that the business as well as employees benefit from development activities undertaken.
- Promote a culture of sharing knowledge and skills with colleagues.
- Assist employees with their continuous professional development.
- Assist a development discussion between employees and their line managers during appraisals.
- Promote considering alternative methods of learning, attending courses and conferences.

## 3. Policy Conditions

### 3.1 Learning Parameters

This policy introduces clear parameters for employees and management to follow in terms of the expected and allowable level of personal development. A minimum of four full days and a maximum of twelve full days per annum (pro rata for part time staff) is the norm adopted by Pineview. These levels will not be breached except in specific circumstances, for example, while undertaking formal qualifications on a day release basis, and with the prior agreement of the line manager.

### 3.2 What counts towards learning and self-development

All learning and development activities, including conferences, courses, self-learning, job shadowing, reading and self-guided learning, attending sessions run by Pineview colleagues, etc will count. Employees are encouraged to consider various methods of learning, in light of their suitability for the purpose and to suit individual preferences.

#### **4. Relationship with the Learning and Development Budget**

Requests for learning or conference fees to be subsidised fully or partially by Pineview will be subject to availability of funds in the learning and development budget. In respect of vocational learning and qualifications, Pineview will meet the cost for course and examination fees in line with EVH Terms and Conditions of Employment, the employee will bear the cost of travel, books and any other expenses.

#### **5. The Role of the Manager in the process**

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

#### **6. Sharing the knowledge with work colleagues**

It is acknowledged that there is a lot of specialised knowledge held amongst Pineview's employees that could better benefit colleagues and the business were it to be shared. This policy aims to encourage colleagues to share their knowledge and skills with each other. Each staff member should aim to provide colleagues 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 (for example, not just sending round a paper picked up on travels), structured and prepared.

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

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

#### **7. Recording development activities undertaken and delivered**

Employees should keep their own simple record of Pineview supported learning and 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 learning throughout the course of the year. Pineview 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.

Finance and Corporate Services will maintain an organisational record of all employee learning and development undertaken for HR purposes.

## **8. The link with the appraisal process**

In order to prompt a meaningful discussion between the staff member and their line manager as well as to help achieve the targets set by this policy, the targets for learning and development activities have been incorporated into the Association's standard appraisal form. Appraisers and staff should work together in achieving this level of focussed development – all of which should be driven by the staff appraisal system, which in turn should heavily reflect business priorities.

## **9. Link to coaching**

Coaching is the highest form of internal learning/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).

## **10. Monitoring and Review**

Monitoring and management of staff learning will be delegated to staff.

This policy will be reviewed at least every three years to ensure it continues to meet the requirements of the Association or where EVH issues a revised Training and Development Model Policy, whichever is sooner.

# **Appendix 1 Shadowing and Mentoring Strategy**

## **1. Background and Introduction**

- 1.1. This strategy has been developed based on the recommendations from our 2024 Investors in People (IIP) outcome report.
- 1.2. Pineview recognises the importance of transferring critical knowledge and skills across the organisation. This process is fundamental to maintaining organisational continuity, enhancing employee knowledge and skills and delivering excellent customer service.
- 1.3. This strategy complements our approach to learning and underlines our commitment to provide opportunities for continuing learning and development and succession planning.

## **2. Purpose of Shadowing and Mentoring Strategy**

- Promote shadowing and mentoring as a key activity within Pineview's overall approach to learning and development.
- Enable everyone to understand the different roles within Pineview and how each should be undertaken.
- Enhance customer service by creating an environment where we promote and develop the understanding of roles and responsibilities within Pineview.

## **3. Shadowing**

- 3.1. Shadowing allows an employee interested in a particular task or role to learn about the characteristics of the job as well as about related competencies, skills and behaviours by observing and engaging with another employee carrying out the task or role.
- 3.2. Job role assessments are maintained for all roles within Pineview. The assessments allow employees to consider every role within the organisation and tailor their development towards their individual needs and desired career path.
- 3.3. Shadowing opportunities can be identified through an individual's self-awareness of their own knowledge, skills and desired career path. One-to-one meetings, as well as the formal appraisal process can also assist employees to clarify shadowing goals and set parameters for implementing shadowing experiences.
- 3.4. Most shadowing opportunities will typically last for a few hours at a time or a full workday, some individuals may shadow every day for a week or two. Regardless of the time spent, job shadowing is a chance to ask questions about the job, identify skills gaps and clarify career goals.

## 4. Mentoring

- 4.1. Mentoring is the act of one individual sharing their knowledge, skills and experience with others, to help them develop and grow professionally or personally.
- 4.2. Decisions on the suitability of employees to be mentees will generally be determined through outcomes from the appraisal process, in which individual learning and development needs are identified within a personal development plan.
- 4.3. The suitability of employees as mentors will be assessed by identifying the skills and qualities necessary for the success of the mentee's personal development plan. While experience and expertise in their field are important, mentors must also demonstrate strong communication skills, empathy, and patience. Additionally, a true passion for fostering the growth and development of others is essential for effective mentoring.
- 4.4. A mentoring relationship should be considered in all instances where an employee embarks on a formal qualification or moves from an officer to manager role. There may be occasions where certain employees, such as new employees who are not necessarily seeking or being considered for promotion, may also benefit from a period of sustained support through a mentoring programme.
- 4.5. Mentoring requires to be a two way commitment to be successful, with both the mentor and mentee having responsibilities. If either party fails to meet their responsibilities and commitments then the mentorship will fail.

The mentor will have responsibilities to:

- understand what the mentee wants to achieve from the mentoring process.
- establish and agree a mentoring programme in terms of regular meetings, feedback, timescales, action plan and resources required.
- be open to challenge and new ways of approaching their role.
- encourage regular meetings with the mentee and oversee their progress against the agreed timetable.
- liaise with the line manager over the mentee's personal development plan and find ways of helping to take this forward.
- encourage networking on the part of the mentee to progress their career as appropriate.
- help to evaluate the overall mentoring process and its outcomes.
- take responsibility for the mentor and mentee relationship and its success within the scheme.

The mentee will have responsibilities to:

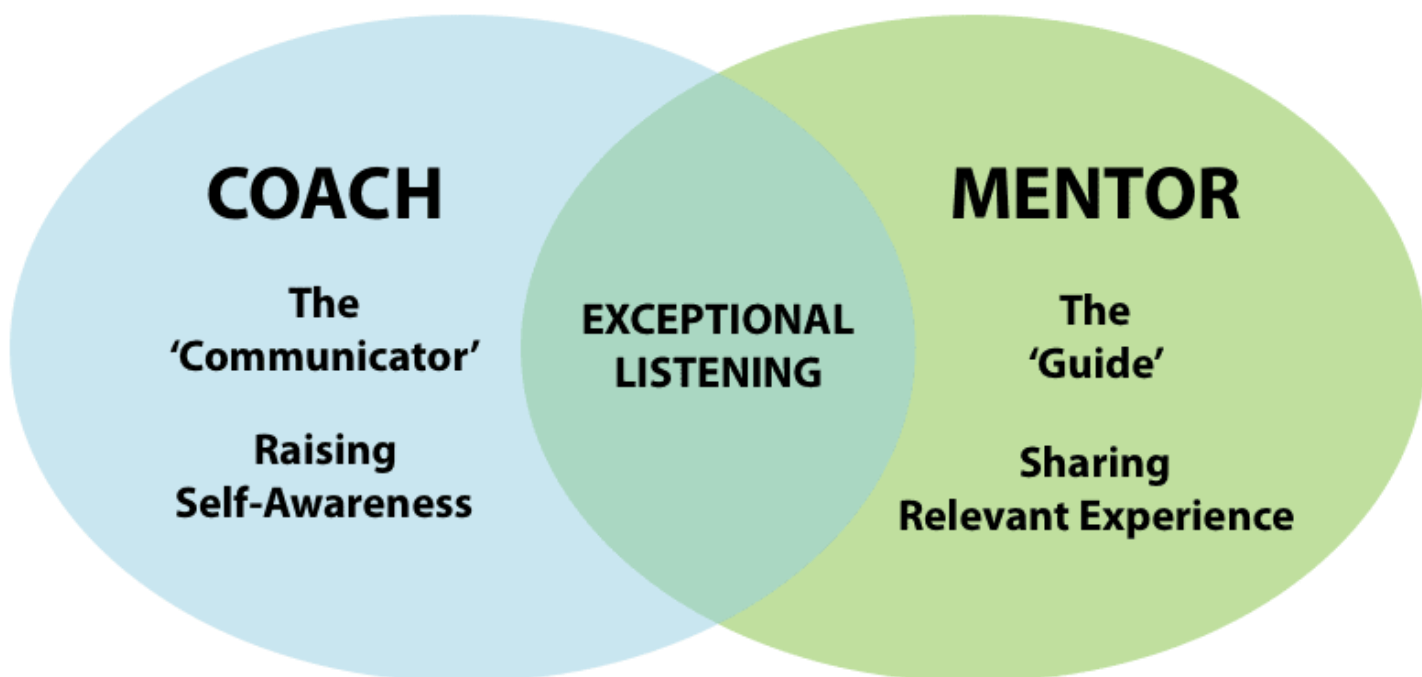
- identify the skills, knowledge, or goals that they want to achieve and communicate them to their mentor.
- initiate regular meetings with the mentor within an agreed time frame.
- ask questions, take notes, give feedback to their mentor.

- evaluate their current and future contribution and agree relevant courses of action to ensure the continuation of progress.
- liaise with the mentor about any alterations required to the personal development plan.
- monitor the progress of their personal development plan and deal with any challenges arising from it.
- take responsibility for the mentor/mentee relationship and its success within the scheme.

4.6. Decisions on the length of the mentoring programme will be determined by individual needs. However, as a guideline, mentoring will normally last for a period of up to one year, and not less than six months.

## 5. Coaching

5.1 Coaching can be another useful tool to support and develop individuals. Coaching and mentoring differ, with the coaching focus being on someone's general and leadership development, with the coach providing assistance for individuals to raise their own self-awareness. Unlike the mentor, the coach does not need to be knowledgeable in the coachee field of work.



5.2 The CIPD produce some good information about coaching and mentoring and the difference between both - <https://www.cipd.org/uk/knowledge/factsheets/coaching-mentoring-factsheet/>



## **Appendix 2 Associated Forms**

The following forms have been prepared to assist the implementation of this policy:

- Record of learning and development undertaken form – Appendix S.21a
- Learning Request Form – Appendix S.21b