

Learning and Development Policy

Policy Details

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1. Introduction

Learning Today Leading Tomorrow is committed to supporting the development of all staff members. The key purpose is to facilitate personal and professional development enabling individuals and groups to achieve their full potential at work.

Our school's operational success is based largely on the contribution, commitment and achievements of individual members of our staff, working individually and in teams or groups. The Trust wants to support staff in the performance of their designated roles and to help them fulfil their potential during the course of their employment.

The policy is written in line with all applicable legislation, such as the Employment Rights Act 1996, the Employment and Training Act 1973 and Section 40 of the Apprenticeships, skills, Children and Learning Act 2009.

2. Scope of Policy

The policy applies to every individual working for the School or Trust irrespective of their status, level or grade. This policy covers Learning and Development which includes any activity, which contributes to the enhancement of their knowledge, skills, competence, and working practices.

3. Responsibilities

The Trust recognises it has a statutory obligation to adopt formal policies and establish workplace procedures for dealing with Learning and Development. The Trust recognises that Learning and Development rules and procedures promote good employment relations and is committed to dealing with matters in a fair and consistent way.

Responsibility for learning and development should be shared between the employee and the Trust. Line Managers have a responsibility to implement, monitor and evaluate the effectiveness of the learning. Employees will be expected to attend training which has been provided and implement the skills gained. All efforts should be made by employees to attend meetings that constitute part of this policy.

The Trust HR team are responsible for providing advice and guidance under this policy and reviewing and updating the policy as required.

The Headteacher has overall responsibility for promoting and maintaining standards of work conduct within each school and the Trust CEO has overall responsibility for promoting this across the Trust.

4. Equal Opportunities

This policy will be applied consistently and fairly to all employees, based on the circumstances of their case. No-one will be treated less favourably on the grounds of their gender, disability, age, race, creed, colour, religion, nationality, ethnic or national origin, trade union membership or activity, sexual orientation, gender reassignment, medical condition or marital status. Involvement in staff learning and development will be determined only by personal merit, performance and by the application of appropriate criteria.

5. New Training Initiatives

The purpose of learning and development within the Trust is to ensure that all our staff have the necessary knowledge, skills and qualifications to deliver outstanding care for all of our students. The Trust believe that effective learning and development plays a vital part in achieving this and in the achievement of our strategic goals.

The Trust is committed to reviewing training initiatives so that learning and development is provided for skills in specific job areas, where work procedures have changed or where new standards are introduced.

Schools should work with the Trust to identify skills needed to deliver important subjects in future curriculums and seek to develop those skills within its existing workforce wherever possible. The Trust encourages schools and employees to propose training or research activities which would bring new knowledge and skills into the Trust for the betterment of our pupils in the short and long term.

6. Training Budget

The Trust aims to allocate the appropriate resources to support learning and development activities identified in annual training plans. All learning and development expenditure should be agreed with the Headteacher at budget review meetings, for approval by CFO.

7. Identification of Staff Development Needs

An assessment of the skills of individuals, when they are appointed to a new role, will lead naturally to the identification of their need for learning and development, related to duties that they are to perform. In addition, staff learning, and development needs may be identified in a variety of ways, e.g. by skills audit, by feedback and by staff performance appraisal. It is our policy that all staff have at least one annual performance review a year with their Line Manager, at which time, learning and development needs will be assessed and ways of meeting these will be identified, and an appropriate timescale agreed.

A range of development methods will be used to meet these needs, this may include (but is not limited to):

- Formal training courses
- External training
- Internal training
- Training for professional qualifications
- Coaching and mentoring
- Background reading and project work
- E-learning or webinar sessions
- Shadowing or on-the-job training

8. Learning and Development Initiatives

The Trust provides a range of training and development opportunities to its employees which include:

- **Internal Development:** these initiatives are implemented as a result of the needs of the Trust and are available to all employees. We provide:

- Technical training relating to the knowledge and skills that you require for your current role and any relevant training which is part of your statutory rights
- Technical or specialist training offered within the Trust relating to the skills that may support your development
- **External Development:** these initiatives are offered by external providers. These initiatives may be funded by the Trust (*see “Financial Support” in this policy for more information*).

Criteria Selection

Decisions on the suitability and applicability of these opportunities should be determined through the performance review process. Any decisions on training will be at the absolute discretion of The Trust and based on the criteria below:

- Personal development plan agreed with the Line Manager which captures learning and development needs (LT2-TE-004-I)
- Relevance to the current role or roles they have agreed with their Line Manager
- Impact on the business’ goals and overall benefit to the company of the employee obtaining this skill or knowledge
- Career progression and succession planning

9. Types of Support

Financial Support

Schools are fully committed to the career development of all employees and are therefore willing to meet the costs associated with necessary and identified personal study and training focused on the school’s requirements. Expenses incurred attending short term training courses, seminars etc during normal working hours, will be dealt with under our normal expense procedures.

Eligibility

The level of financial support available will depend on the course and type of study. If the course is considered to have limited business benefit, you may receive a percentage of the funding required at the discretion of The Trust.

The level of financial support will be based on the following criteria:

- Minimum of one-year service with The Trust (any discretion needs to be authorized by the CEO)
- Demonstration of a consistent satisfactory performance
- Demonstration of commitment to the programme proposed to study
- Relevance to the current role or roles they have agreed with their Line Manager shown on a personal development plan (PDP)
- Impact on the business’ goals and overall benefit to the company from the employee

obtaining this skill or knowledge

- Benefit from sponsorship to the employee compared to other free initiatives (i.e. internal or on-the-job development)
- How appropriate the level of the course is to the employee
- Reputation of the course and college or course provider

Employee's Application Process

If you are planning to request financial support, you should complete an Application for Support Form (LT2-FO-003-I) and submit it to your Line Manager. Once authorised by your Line Manager, they will send it to the Finance Department for approval. All applications will be considered on their individual merit as per the criteria for selection above.

In cases where training ends with examination, you are obligated to submit the results. If you do not pass the exam, you can retake the exam at your own expense.

If an employee decides to drop or cancel a training, they will have to inform the Trust HR Team immediately. They will also have to shoulder any cancellation or other fees.

The Trust's Decision

Those who are granted with a funding will be supplied with a letter confirming the Trusts' sponsorship. Employees should arrange for the provider to invoice the Trust after receiving the letter.

Appeals

Employees have 14 days to appeal against the decision and should send their appeal to the Headteacher. A meeting will be arranged between the Headteacher and the employee to discuss the appeal and the reasons why the employee is dissatisfied with the decision. A decision will be made and notified to the employee within 14 days of the date of the meeting.

Any required extension to the time periods contained within this policy will be agreed between the employee and the HR Department and confirmed in writing.

Study Leave

Most employees have the right to request time off to carry out training and this policy sets out how the Trust approaches these requests.

This policy applies in the following circumstances:

- employees that have worked for the Trust for at least 26 weeks
- the chosen training course must help the employee in their job role
- the chosen training must be one that either leads to a qualification or to develop a skill, where the training is relevant to the job role in the Trust
- only one request may be made in any 12-month period (unless the training previously agreed to was cancelled or could not be started through no fault of the employee).

Employees cannot ask for time off for training or study if they're agency workers.

Time off for study leave is paid.

The Trust will only consider requests for study leave to undertake training that will help employees to be more productive and effective at work and can help The Trust to improve business productivity and performance.

All time taken must be agreed with the appropriate Line Manager in advance. If the course makes demands beyond these guidelines, you may request to take days off as annual leave or unpaid leave at the discretion of your Line Manager and with authorisation from The Trust. You are required to attend all training sessions. Missed training sessions must be reported to both your Line Manager and the training provider within two hours of the start time and an explanation of failure to attend provided.

The Trust reserves the right to ask course organisers for periodic reports on any member of staff's progress.

Line Managers should consider the individual's circumstances and seek the Headteacher's permission before any additional course fees, or payments are made.

Failure to attend training courses, examinations/assessments or other inappropriate behaviour whilst on a training course may be deemed a disciplinary offence and, as such, disciplinary action taken against you.

Right to Request Time Off for Training – Procedure

To make a formal request for time off for training, an application form should be completed. The application forms are available on the Trust Intranet or by contacting the Trust HR team. The application forms comply with the requirements of s63D Employment Rights Act 1996 in relation to the making of a request. The Line Manager will respond in writing to the request within 28 days of receipt. The Line Manager will arrange a meeting with the employee to discuss the application.

The employee is entitled to be accompanied by a colleague or trade union representative and if the person they choose to accompany them is not available, the Trust will rearrange the meeting. The Line Manager may request that the employee consider a different training, consider different times or locations or discuss whether to make an application for some or all training fees to be paid by the Trust.

Employee's Application Process

In order for a request for time to train to be valid, you must submit a Time off for Training Form (LT2-FO-004-I) to your Line Manager.

You can only submit one request in a 12-month period. The request can be withdrawn by you at any point, verbally or in writing, before The Trust has notified you of its decision.

However, it will still count as a request unless you request to ignore it under the following circumstances:

- You notify us of mistakenly submitting an earlier request before 12 months elapsed and you wish to withdraw your application
- You did not undertake training agreed following a request because the training was cancelled (unless this was due to your own conduct in relation to the study or training)

- You failed to start training that was agreed as part of a request because of some unforeseen circumstances beyond your control

The Trust's Decision

The Line Manager will contact you regarding your request within 28 days of receipt of your valid application and either:

- Accept the request and inform you of our decision in writing
- Request additional information
- Propose a meeting with you to discuss the request

The meeting will be at a time and place which is convenient to both you and the school. If you fail to attend the meeting more than once without reasonable cause, we may consider the request withdrawn. You are entitled to be accompanied at the meeting by a fellow employee who is permitted to address the meeting and confer with you during it, but may not answer questions on your behalf. You will be informed of the decision in writing within 14 days of the meeting and you are entitled to appeal against The Trust's decision.

The Trust is not obliged by law to automatically agree to a request or to deal with one that is not in writing or does not contain the required information. Sometimes we may ask for additional information before giving the request proper consideration. Failure to provide this additional information may result in the request being withdrawn by The Trust.

Employees do not have automatically the right to be paid for the time spent in training. Timescales for holding meetings and issuing notices of decisions on applications and appeals can be extended by agreement with the employee. This agreement must be recorded in writing and a copy given to the employee.

Accepting the Request

If the Line Manager is able to support the application, the application will be granted and practical arrangements will be made for the time off for training to be implemented.

The Line Manager will write to the employee confirming the training arrangements, including the time off that has been permitted, whether this is paid or unpaid and the changes to the working patterns (if any). The Line Manager will also confirm whether the Trust has decided to fund all or any of the costs of the training, including details on whether this includes additional training costs such as expenses. The employee should sign and return a copy of the training arrangement to confirm their agreement (LT2-FO-003-I)

Rejecting the Request

The Line Manager may reject the application, either within 28 days of the Application for Support Form – (LT2-FO-003-I) being received or 14 days after a meeting, whichever occurs. The reasons for the refusal will be issued to the employee in writing.

The application to take study leave might be refused:

- It would not improve the employee's effectiveness
- It would not improve the performance

- The burden of the additional costs would be too high
- It will have a detrimental effect on the ability to meet students' needs
- It will have a detrimental impact on quality
- It will have a detrimental impact on performance
- Line Manager will be unable to reorganise work amongst existing staff
- Unable to recruit additional staff
- There will be an insufficient amount of work during the periods the employee proposes to work
- There are planned structural changes during the proposed study or training period

Appeals

Employees have 14 days to appeal against the decision and should send their appeal to the Headteacher. A meeting will be arranged between the Headteacher and the employee to discuss the appeal and the reasons why the employee is dissatisfied with the decision. A decision will be made and notified to the employee within 14 days of the date of the meeting.

Any required extension to the time periods contained within this policy will be agreed between the employee and the HR Department and confirmed in writing.

Withdrawing a Request

An employee may withdraw their request, either orally or in writing, at any time before you have notified them of your decision. If you receive an oral request to withdraw, the Line Manager must confirm it in writing to the employee.

If an employee withdraws their request, it will still count as a request received under the statutory right.

Withdrawing an agreement

When considering an employee's request, the Line Manager should attempt to foresee circumstances in which they may need to later withdraw an agreement if the Line Manager accept the employee's request. This should then be agreed with the employee and also confirmed in writing to them as part of the written acceptance of their request.

10.Recovery of Training and Development Costs

Employees are required to provide evidence of completion each year, where the course lasts for more than one year.

There are some situations where the employee will be liable to reimburse the funding to The Trust. This will be at the head teacher's discretion but as a guideline this should apply for courses with a value of £300 or more.

Where the Trust pays for you to receive training and you fail to complete the course and/or leave the Trust's employment (either through resignation or dismissal) before the end of 2 years from the conclusion of the course you will be liable to repay some or all of the fees, expenses and other costs associated with such training in accordance with the Trust's policy

in force. Unless there is a separate agreement which you will be required to enter in respect of that training.

You agree that the Trust may deduct the costs under this section from your salary or any outstanding payments due to you.

You agree that if the Trust agrees to waive your obligation to repay the costs under this section, you will be solely responsible for any income or other tax payable as a result of the waiver and you shall indemnify the Trust on a continuing basis in relation to any such tax.

You will refund the Trust all, or a proportion of, the costs incurred based on the following scale:

- before commencement of the course but after fees etc have been paid: **100%** of the liability which remains subsequent to attempts to recover any costs from the training provider
- upon failure to complete the course, or failure to pass any required exams: **100%**
- at any point during the course, or within six months after course completion: **100%**
- more than six months but less than 12 months since completion: **75%**.
- more than 12 months since completion but less than 24 months since completion: **50%**

You agree that you must repay 100% of the amount received, if you do not, in the reasonable determination of your Line Manager, make all reasonable efforts to:

- attend for relevant examinations
- make reasonable efforts in my studies
- complete the course.

No repayment will be necessary in the event that employment terminates due to compulsory redundancy or long-term ill health. However, this agreement will apply to voluntary redundancy and regardless of the reasons for dismissal.

The reimbursement clause above does not apply in relation to apprenticeships which were funded through the apprenticeship levy. In all cases relating to apprenticeships whereby an employee subsequently leaves the trust within two years, no cost is required to be reimbursed.

In the event of your failure to pay you agree that the Trust has the right as an express term of your contract of employment to deduct any outstanding amount from your salary or any other payments due to you on the termination of your employment in accordance with the legislation currently in force.

Should your final pay be insufficient to cover the total amount outstanding, you agree to make a separate payment within one month after your employment has ended or to repay in accordance with a repayment schedule which may be agreed with Learning Today Leading Tomorrow. Should you fail to make payment within one month or in accordance with the

agreed repayment schedule, you understand that Learning Today Leading Tomorrow may take legal action to recover the amounts outstanding.

11. Access to information and Trust Equipment / Facilities

Any information that employees obtain in their normal work can be used for study purposes provided that:

- The information is not confidential or sensitive;
- Employees do not remove original documents;
- Employees delete specific elements such as names, places, products, etc;
- The information does not circulate beyond the tutor, assessor or examiner;
- Employees inform their Line Manager in advance of using the information.

Use of The Trust equipment and facilities and exceptional requirements must be agreed with the Line Manager before the commencement of the study. Use for study purposes must not interfere with normal work. The Trust accepts no responsibility for information that employees store using work equipment.

12. Recording of Learning and Development Activities

Following a performance review, a copy of the approved personal development plan is placed in the employee's personnel file. The benefits of training activities undertaken by individuals or staff teams should be reviewed within the relevant department following each activity.

Evaluation and review will also be undertaken centrally by Trust HR Team, particularly where training is offered to a group of staff or where substantial investment is involved.

13. Training Involving Examinations

The Trust is investing in your learning, the employee is expected to apply due diligence in their examinations/assessments in order to perform at the required level.

The employee is required to provide notification to their Line Manager of the date/time of any examinations/assessments. If the date subsequently changes, or the examination/assessment is cancelled for any reason, the employee is required to inform their Line Manager at the earliest opportunity, and in all circumstances, before the examination or assessment is due to take place. If, upon attendance for an examination or assessment, you are informed that it will not take place, the employee must contact their Line Manager immediately and attend work, unless instructed otherwise by your Line Manager.

If an employee fails to keep their Line Manager updated on the above aspects of their training, the employee may be subject to disciplinary proceedings.