



Southside Housing Association Training & Development Policy

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Contents

1. Introduction	Page 03
2. Objectives	Page 03
3. Policy Conditions	Page 03
4. Priorities	Page 04
5. Resources	Page 04
6. Responsibilities	Page 04
7. Access to Training	Page 05
8. Conditions for Vocational Courses	Page 05
9. Evaluation of Training	Page 06

Appendix 1: Training & Development Payment Template Letter

Appendix 2: Employee Annual Appraisal Template Form

1.0 INTRODUCTION

- 1.1 Southside Housing Association strives to support its employees' development, while at the same time ensuring that such development is relevant and supports the business.
- 1.2 The Association will ensure that all staff are treated fairly when considering training opportunities.
- 1.3 The Association considers that training and development of staff contributes to the aims and objectives put in place by the Association.
- 1.4 The Association would like to provide staff with the opportunity to have funded training specific to their role in order to improve their job performance and help develop their skills, experience and knowledge.

2.0 OBJECTIVES

- 2.1 Southside Housing Association's Training and Development Policy aims to:
 - Ensure staff are sufficiently trained, experienced and qualified to deliver a quality service
 - Assist the Association's staff members with their continuous professional development.
 - Promote consideration of alternative methods of training to attending courses and conferences.
 - Provide training which will help achieve the Association's objectives
 - Promote a culture of sharing knowledge and skills with colleagues

3.0 POLICY CONDITIONS

What counts towards training and self-development

- 3.2 The term 'training' includes the following:
 - On the job training
 - Induction
 - External courses including online courses and webinars
 - Further Education
 - Professional courses
 - Conferences, Seminars and Forums
- 3.3 The term 'development' covers
 - Internal placements
 - Secondments
 - Continuous Professional Development
 - Inclusion in working groups
 - Projects

- Covering for colleagues
- Shadowing colleagues
- Mentoring

4.0 PRIORITIES

4.1 The Association has a limited budget for training and therefore needs to prioritise when demand exceeds our ability to provide training.

4.2 The priorities listed below give a range of areas where priority would be given over an individual request.

- Our customer service standards
- Health & Safety
- Any legal obligation for the Association
- Business objectives as noted within the Business Plan
- Ensuring employees have the necessary skills to carry out their role effectively.

5.0 RESOURCES

5.1 Resources that the Association can offer staff to help with training and development opportunities are:

- Ensure budgets capture the training needs for each department
- Provide an allowance for manuals or books
- Give time off during working hours to carry out training courses
- Give time off for exams as per our terms and conditions
- Provide support from other staff including mentoring and shadowing
- Provide in-house training

6.0 RESPONSIBILITIES

Staff Member

6.1 Staff can discuss training requirements with their line manager at their regular one to one meetings or at their annual appraisal. However, training and conferences may be discussed as and when they arise throughout the year.

Line Managers

6.2 Each line manager is responsible for ensuring their staff are trained to carry out their day-to-day role and are able to access training and development opportunities if required. Line manager's responsibilities include:

- Identify training needs
- Monitor the value and success of training sessions
- Promote training and development to all team members

7.0 ACCESS TO TRAINING

- 7.1 It is important that all staff have equal access to request training and have all requests considered in line with priorities of the Association
- 7.2 Conferences and Seminars will be considered for staff where this will benefit both the individual and the Association
- 7.3 Staff will be given paid leave for attendance to external workshops in relation to professional and vocational qualifications.
- 7.4 The Association will consider giving assistance to employees to pursue part-time vocational courses directly relevant to their career in line with EVH Terms and Conditions.
- 7.5 The courses may lead to a professional qualification and may be day release or online. Approval will be subject to organisation and budget constraints and must be approved by the Leadership Team.
- 7.6 An allowance will be made available at the discretion of the line manager in relation to books and materials.
- 7.7 Expenses for travel to and from an external course will be paid as per the Association's Expenses Policy.

8.0 CONDITIONS FOR VOCATIONAL COURSES

Repayment for Vocational / Professional Qualifications

- 8.1 In the event of a staff member leaving during a further education course, they will be liable to repay the current years' fees paid by the Association to the date of leaving, plus a proportion of the previous year's fees as per the guidance below.
- 8.2 In the event of the staff member leaving the Association's employment within 12 months of completing an applicable further education course, the Association will reclaim a proportion of the fees payable the previous year as follows:
- Within one month – full years payment
 - Within 2 months – 11/12^{ths} of payment etc. down to
 - Within 11 months – 1/12th of payment
- 8.3 The date from which the 12 months will start will be the end of term for the course.
- 8.4 The above repayment criteria will also apply where the staff member withdraws from a Course unless:
- The staff member, on presentation of written justification, has obtained the Leadership Team or Finance & Corporate Services Sub-Committee's agreement to withdrawal

- The staff member has had to withdraw due to long term sickness, maternity leave or redundancy

8.5 Where a staff member leaves the Association due to redundancy they will not be expected to repay any fees for further education courses.

8.6 Where a staff member is on a fixed term contract, they can be considered for further education courses with the approval of the Finance & Corporate Services Sub Committee provided that the completion of the course will be at least three months before their contract ends.

8.7 Where a staff member on a fixed term contract leaves prior to the end of their contract, they will repay fees at 1/12th of the cost.

8.8 Any staff member attending further education, will be required to sign the repayment of fees form (Appendix 1).

Payment of Professional Fees

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

- Membership must be directly relevant to the work of the Association
- Only one set of fees will be reimbursed where the staff member is a member of more than one institution

9.0 EVALUATION OF TRAINING

9.1 It is important that both the Association and the staff member know that the course / training / development have been value for money and the employee has gained knowledge they would not otherwise have gained. The staff member should report back to their line manager and also complete the on-line Training Evaluation Form.

APPENDIX 1

Date:

Chief Executive
Southside Housing Association
Southside House
135 Fifty Pitches Road
GLASGOW
G51 4EB

Dear

AGREEMENT TO REPAY PROFESSIONAL / VOCATIONAL TRAINING FEES

I,, in consideration of having been granted facilities in terms of the Training Policy of the Association, to undertake an approved course of studies namely the with, hereby agree to comply with the terms of the repayment schedule (which I acknowledge forms part of this agreement) regarding repayment of fees in the event of me leaving the Association's employment.

I confirm that the Course starts in and the end date for this year will be, and that I will advise you of the exact date of the end of term for the course.

I accept that, until the expiry of the timescale for leaving with no repayment due, any monies paid by the Association on my behalf for the course will be regarded as a loan.

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.

Yours sincerely

Signed: Date:

Witnessed by: Date:

Designation:

Staff Appraisal 2024

Name:		Name of appraiser:	
Date Received	Date given to appraiser	Date of Appraisal	

We are asking you to rate yourself in a few key areas; give examples of what you have achieved since your last appraisal and tell us what you would like to develop in 2023/24. When setting goals, try and make them SMART - SPECIFIC, MEASURABLE, ACHIEVABLE, RELEVANT, TIME BOUND. When setting training, ensure you tell us why you need/want the training. The information will only be shared with the person doing your appraisal, the Corporate Services Manager and the Director.

- On a scale of one to 10, how do you think you performed this year with 1 being very poorly to 10 being outstanding and over and above what could be expected. (Mark with an X or shade)

Your Score

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

What reasons do you give for this score?

Appraiser Score

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

What reasons do you give for this score?

During the appraisal, please discuss the two scores and comment below as to whether there has been any change to either parties' outcome. It is ok to disagree or change, but either way please state if there has been a change or difference in score.

--

2. On a scale of one to 10 (same scale as above) how do you think your team performed this year?

Your Score

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

What reasons do you give for this score?

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Appraiser Score

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

What reasons do you give for this score?

--

During the appraisal, please discuss the two scores and comment below as to whether there has been any change to either parties' outcome. It is ok to disagree or change, but either way please state if there has been a change or difference in score.

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3. Give two examples of work you are proud of from the last year and what skills you used and the outcome of the work.

Example 1:

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Example 2:

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Appraiser Comments. Does the appraiser have any other example they want to share?

4. Give an example of where something has gone less well and what you did to rectify any problems and what you learnt from the experience.

Appraiser Comments. Does the appraiser have any other example they want to share?

5. In our Job Descriptions, we all have core competencies for our roles. Read the following core competencies and tick whether you excel at this competency, could improve or if you think it doesn't apply to you. Please comment on your choice. Please note, in question 6 you can identify areas where you can improve and ways to do that.

Competencies	Excel	Improve	Doesn't apply	Comments
Communication with Customers – either public or Board Members				
Communication with staff				
Completing tasks and achieving results				
Self-confidence and self-motivation				
Motivating and inspiring others				
You can make things happen in your team.				
Appraiser Comments:				

6. Included below are the competencies from Question 5 plus a few skills. Tell us if there are any you would like help to develop and why. At the Training and Development section below, you can add the suggested training to your training plan for this year.

Competency/skill	Complete any boxes below where you think you can improve on your competency and how you would want to do that – e.g. training, shadowing, researching
Communication with Tenants	
Communication with staff	
Completing tasks and achieving results	
Self Confidence and self-motivation	
Motivating and inspiring others	
Make things happen in your team.	
Lead or be part of a project over and above your normal job.	
You are open to learning and developing yourself to gain new skills.	
IT and mobile working (if it is relevant to you)	
Supervising others (if it is relevant to you)	
Appraiser Comments:	

7. Is there anything else you want to talk about from the last year or going forward into the next 12 months – achievements, worries, ambitions for the future?

Goals – 2023/24

Consider each of the goals you set out last year and identify whether you achieved them or experienced any difficulties in doing so. Discuss.

Outline Goal	Achievement/Outcome
1.	
2.	
3.	
4.	

Goals – 2024/25

When setting your goals for this year, think about our values and about what you hope to achieve in the coming year. Think about the work you do, teamwork or a new skill. This should not just be elements of your job description, more about things you would like to improve on or achieve.

Set 3 to 5 goals that will stretch you and which will allow you to move forward in your job. Try to make them SMART, SPECIFIC, MEASURABLE, ACHIEVABLE, RELEVANT, TIME BOUND

Outline Goal	How and when will you do this?
Goal 1	
Goal 2	
Goal 3	
Goal 4	
Goal 5	

Training and Development

Training is not just about being on a course. It can be working with a colleague to learn and develop a skill; it can be self-learning as you learn a new piece of software, or it can be gaining skills by shadowing in another team. And of course, it can be a course, or online session that helps with understanding a topic.

1. Thinking about the training you wanted to do last year and what training you did last year, tell us about:

Training that was successful and I use in my job
Training that was not successful and I do not use in my job
Training I asked to go on but did not do. Tell us why this is and if you still want to do it.
Anything else about training from last year?

2. Tell us about training you would like or feel you need to do in the next 12 months, or is there a professional course that will take a few years to complete? We have put 6 key elements for you to answer and consider before filling in your training preferences:
1. Tell us about training you would like to do and why.
 2. Tell us what timeframe you would like it to happen.
 3. Is there a provider that you would like to use?
 4. Is the training personal development or would it be corporate, such as equalities training?
 5. Is the training best done online, face to face or as a group session at Southside?
 6. Do you think shadowing would help or a mentor? Click [here](#) to see information on Mentoring.

FOR EACH TRAINING AREA IDENTIFIED FOR NEXT YEAR PLEASE ANSWER 1-6 ABOVE

Training 1	
Training 2	
Training 3	
Training 4	

Please add more if needed.



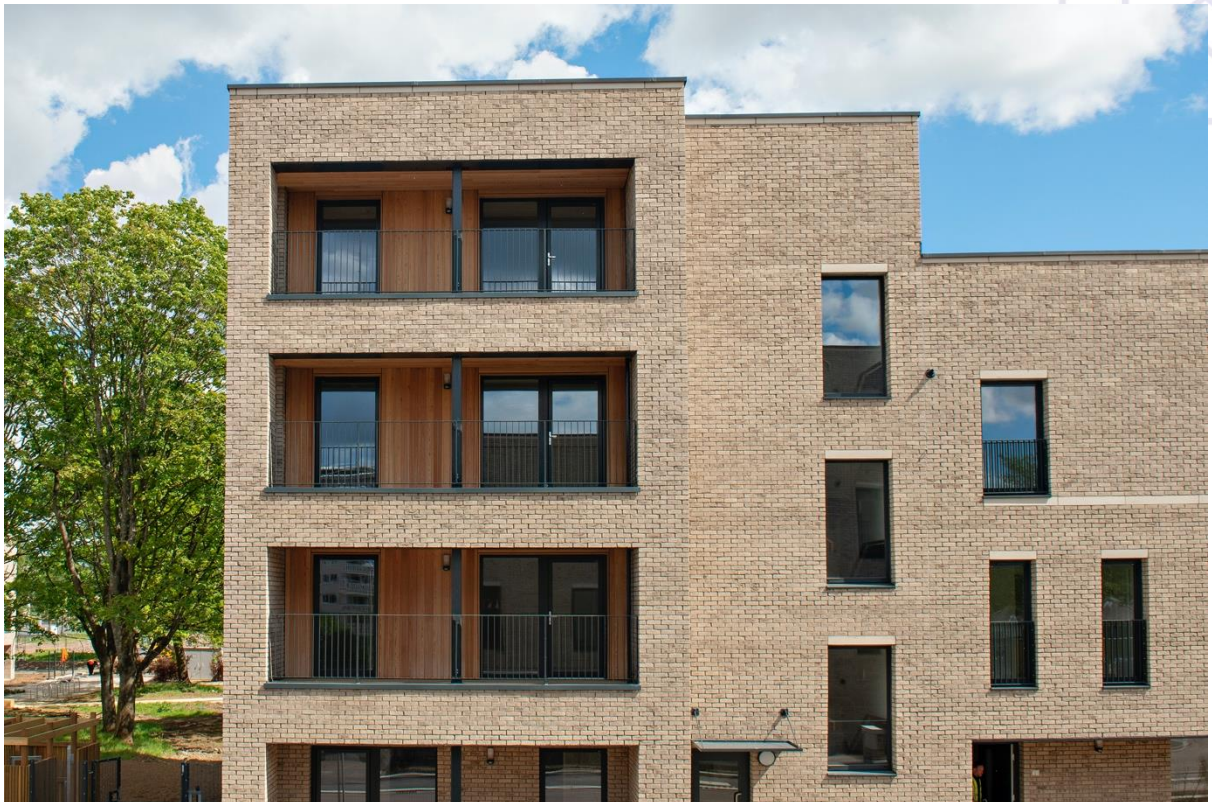
This form will be agreed between yourself and the appraiser:

Signed:

Date:

Signed

Date:



Southside Housing Association

T: 0141 422 1112

E: CSD@southside-ha.co.uk

A: Southside House, 135 Fifty Pitches Road, G51 4EB