

Appendix 2



*Cherwell*  
DISTRICT COUNCIL  
NORTH OXFORDSHIRE

# Learning and Development Policy

## DOCUMENT CONTROL

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## DOCUMENT APPROVALS

This document requires the following committee approvals:

<b>Committee</b>	<b>Date of meeting pending approval</b>
Personnel Committee	7 February 2024

## DOCUMENT DISTRIBUTION

This document will be distributed to all employees of Cherwell District

## DATE FOR REVIEW

No later than 28<sup>th</sup> February 2027 but sooner if impacted by legislative changes.

## REVISION HISTORY

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# Learning and Development Policy

## 1. Purpose

1.1. The purpose of this Learning and Development Policy is to establish guidelines and procedures for providing training and development opportunities to Cherwell District Council employees in a fair and consistent manner. This policy aims to support the professional growth, skill enhancement and career development of the workforce while aligning with organisational values, strategic priorities and objectives.

1.2. All employees are entitled to:

- Equal opportunities in all aspects of their development.
- An induction into their job, their team and the organisation.
- An explanation of the vision and the objectives of the organisation.
- Clear and measurable objectives for their performance at work.
- A twice, yearly review of their performance.
- A manager who is committed to their staff development.
- Coaching and mentoring from their Line Manager to enhance learning, development and career progression.

## 2. Scope

2.1. This policy applies to all employees of Cherwell District Council, including those who are full time, part-time and/or on a fixed contract. It encompasses various forms of training and development, including but not limited to on-the-job training, workshops, seminars, online courses, qualifications and apprenticeships.

2.2. Only essential training necessary for fulfilling an employee's job role will be considered during their six-month probationary period.

2.3. Agency, contractors and casual staff should attend training specifically required for their role as directed by their Line Manager and attend appropriate corporate induction training.

## 3. Roles and responsibilities

### 3.1. General

Employees and Managers will meet on a regular basis through appraisal and 1-2-1 meetings. As part of these meetings, the manager and the employee will identify and review any development that needs to be undertaken to enable them to effectively carry out their role in line with the organisations' values, strategic priorities and objectives. Training needs may also be identified via legislative requirements and changes and government policies, as they arise.

### **3.2. Employee**

- Ensure they take an active part in the planning of their own development and undertaking activities agreed with their manager and in line with their job role.
- Identify development that fulfil the criteria of any CPD obligations for their role and their institutional and legal responsibilities.
- Apply the new knowledge and skills to their work as appropriate and cascade to other members of staff with their team as required.
- Maintain any CPD record that is required for their institution or that is required legally for their role.
- Attend any corporate training identified for their role.

### **3.3. Line Manager**

- Organise and support local induction for new staff.
- Support their employees to help them to identify their individual development training needs.
- Signpost employees to relevant training and qualifications required due to a change in role, new to a role, legislative and government policy updates or CPD requirements.
- Meet regularly with the employee to review and identify any training and development needs, CPD or qualifications required for them to carry out their role effectively.
- Signpost employees to in-house training and development opportunities.
- Authorise any training requirements based on individual, team and directorate requirements.
- Evaluate the effectiveness of the development that has been undertaken by the employee.

### **3.4. Executive and Senior Management Team**

- Actively encourage Learning and Development across their Directorate in line with organisational values, strategic priorities and objectives and individual training needs.
- Assistant Directors or Heads of Service will review and authorise Learning and Development Applications for their Directorate.

### **3.5. HR and Organisational Development Team**

- Manage the central learning and development budget for the organisation.
- Provide an administrative service for booking external training requiring funding from the learning and development budget and apprenticeship levy.
- Develop and review the Corporate Induction Programme for new staff.
- Source, develop and review the Corporate Training Programme/Offer as required.

- Provide support and guidance to employees and managers to identify and address training and development requirements.
- Work with internal and external providers to identify and commission training as required.
- Communicate any corporate training and development opportunities to the organisation and organise as required.
- Record training activities, qualifications and apprenticeships booked through the HR and Organisational Development Team on iTrent.

#### 4. What do we mean by learning and development?

##### 4.1. Corporate and Local Induction

All staff including agency, contractors and casual staff (as appropriate) will be booked on to the corporate induction by the HR Team and will be set up with access to iHASCO to complete mandatory corporate e-learning modules.

Local inductions will be set up by the line manager to introduce the new employee to their team, directorate and the organisation.

##### 4.2. Formal training / conferences / seminars (individual or team)

We encourage staff to attend training sessions relevant to their role to keep their skills and knowledge up to date. These can be funded or unfunded but if funding is required by the Learning and Development budget, the process for [booking on to learning and development](#) needs to be followed. All training sessions need to be discussed with the Line Manager, and budget availability must be confirmed by the Learning and Development Manager, before any booking is made.

##### 4.3. Organisational learning resources

We have a number of organisational learning resources available for staff to use. These resources are accessed via the intranet under Quick Links or via the Human Resources Intranet pages and include:

4.3.1. **Bookboon** - free audio and e-books covering topics including personal development, leadership, IT, management skills and much more?

4.3.2. **Quarterdeck** - our soft skills, on-line learning platform, which will give you access to on-demand training library of bitesize videos, 1:1 private coaching and live monthly training (dates are made available once you sign up to Quarterdeck learning)

4.3.3. **West Midlands Coaching and Mentoring** - we have access to the West Midland Employers' coaching and mentoring framework, which gives staff access to over 100 professionally qualified coaches from a broad range of backgrounds, all of whom are or have been serving public sector officers.

4.3.4. **iHASCO** – our Corporate e-learning package. This provides all the mandatory training required for all staff to complete and includes Safeguarding, Prevent, GDPR, EDI and Health and Safety modules. Employees will be reminded by iHASCO to re-do and refresh their knowledge on the modules on a one-, two- or three-year period, dependant on the module. New employees will be allocated all mandatory modules when they start and asked to complete within one month of their joining date.

#### 4.4. **Post Entry Training/Qualification (PET) and Apprenticeships**

Post Entry Training/Qualifications and Apprenticeships is training that is essential or mandatory to fulfil the requirements of the specific role and results in a recognisable qualification.

This is also learning that is detailed on a person specification for the employees' job, training relating to a career graded post or training that has become essential due to changes in the employees' job and has been confirmed via a written appraisal form (with an amendment to the person specification).

As a general rule, if an apprenticeship is identified for the Post Entry Training/Qualification, then the employee will need to complete the training or qualification via this route. There may be mitigating circumstances when this will not be viable but these will need to be discussed between the employee, Line Manager and HR Business Partner/Learning and Development Manager at the time of the application. It is not a viable reason for the employee to express that they do not wish to follow the apprenticeship route and consideration will be given as to whether the employee will need to contribute towards the course fees in this instance.

Apprenticeships are excluded from the Repayment of Fees detailed below.

##### 4.4.1 **Repayment of course fees (PET courses/qualifications only)**

Any employee who is given approval for Post Entry Training must give an undertaking to remain in the employment of the Council, for at least two years from the date the course is completed. The Learning and Development Agreement Letter will be issued to the employee and must be returned to the HR Team prior to course fees being paid and attendance starting on the qualification.

Repayment of the financial assistance received will be required from an employee who either:

- Fails, without good reason, to complete the course whether by choice or direction (for example being expelled from the course) and includes leaving employment with the Council during the period of a course. This does not include deferring completion, providing the course is completed within two years. In this case repayment would be 100%.
- Fails, without good reason, to sit expected examinations or other course completion requirements such as dissertations or project work. In this case repayment would be 100%.
- Leaves the Council's employment within two years of the date the qualification was obtained. This includes moving to another local government post. In this case recovery will be based on one twenty-fourth of the total cost of the course and books, where the overall amount owed reduces by one twenty fourth for

each month of completed service (up to twenty-four months) after the employee receives notification that they have completed the qualification.

4.4.2 When seeking to recover costs under this policy, the Council will include any costs of books, materials or mileage claims but not salary for study time or absence, such costs will be deducted from your final salary. Funding will not be reclaimed if:

- An employee dies in service or leaves on ill health grounds
- an employee is the subject of redundancy

#### 4.4.3 **Reimbursement of Expenses to Employees**

- Reimbursement for the cost of books and for equipment incurred up to a maximum as agreed in the Learning and Development application form will be subject to prior approval by the appropriate Head of Service and the Learning and Development Manager, with the production of relevant receipts. If approved, claims should be made via iTrent ESS.
- Should the cost exceed that requested in the original Learning and Development application form, the extra money should be found from departmental budgets, unless there are exceptional circumstances.
- Reimbursement for the cost of accommodation will be subject to prior approval from the appropriate Assistant Director or Head of Service. Claims must be paid from the employee's department budget. The production of receipts is required. Accommodation costs must always be avoided where possible. Accommodation should not be used if the cost of travel is less. If accommodation is booked when travel costs would be less a valid reason must be given.
- Travel expenses must be agreed with the Line Manager and, once agreed, will be paid from the employee's department budget. Claims will be submitted via iTrent ESS Expenses.

#### 4.4.4 **Leave Arrangements**

**4.4.4.1 Time off to attend Training (Day Release)** - Where support for day release has been approved, paid time off will be given to attend college or on-line/virtual study. However, where college tuition is for half a day (virtual or classroom based), employees must attend work for the other half of the day. Any paid time off must be detailed on the training application form and discussed with the Line Manager. Flexi records will be refunded at 7 hours 24 minutes for a full day and 3 hours 42 minutes for a half day (or pro rata for part time staff based on the hours worked on that day).

Guidance is set out below for Study Leave, Exam Leave and Field Trips. If additional time off to attend training is required in addition to these, it is at the Line Manager's discretion.

**4.4.4.2 Annual Leave/Flexi Leave** - Employees will not normally be given approval to take annual leave/flexi leave at times when they are committed to attend college. Line Managers may approve leave in exceptional circumstances.



**4.4.4.3 Study Leave** - If study leave is required for course attendance, for field trips or exams, this should be discussed with the Manager at the outset as part of the application process, so full consideration can be given to staff cover and other organisational obligations.

Additional days will be approved in exceptional circumstances in line with the organisations and team priorities. The applicant should speak with their Line managers who will need to give consideration to:

- The length of the course.
- If study leave has already been provided and if so when and for how long.
- Time off will be provided pro-rata to the hours the employee is contracted to work.

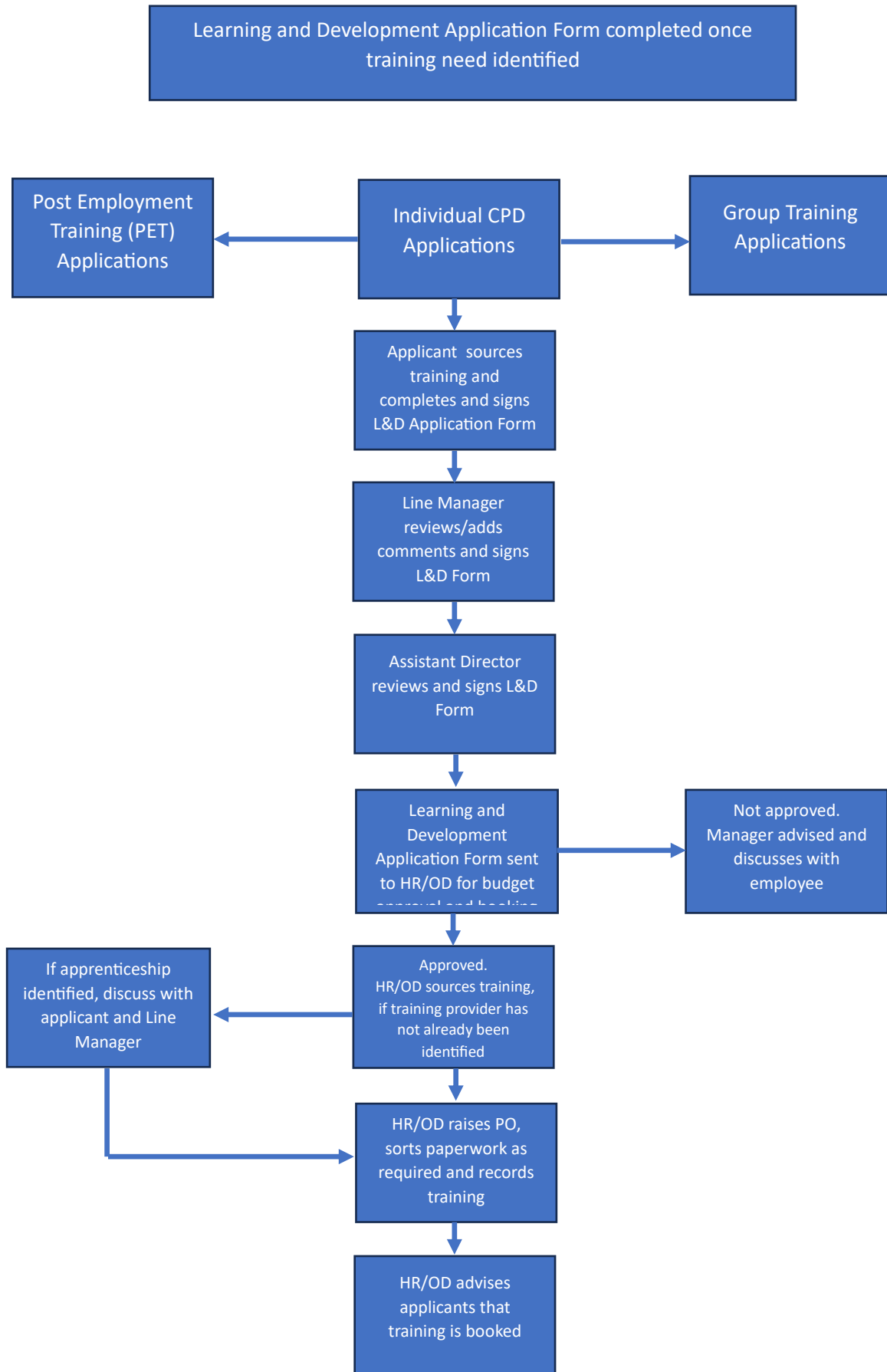
**4.4.4.4 Exam Leave** - the employee can take one day's study leave for each exam. No extra time will be given for re-sits, although the employee can take annual leave or flexi.

**4.4.4.5 Field Trips** – the employee can take time off for field trips, as long as these are discussed fully with the Line Manager before course commencement. It would be expected that equal study leave to equal annual leave or flexi would be taken eg a one week field trip would be 2 ½ days study leave and 2 ½ days employee annual leave or flexi.

## **5. Applying for funding from the Corporate/Central Learning and Development Budget**

- 5.1 The Learning and Development budget is held centrally by the HR and OD Team and employees can apply for funding for qualifications, seminars, CPD training etc. All applications must be approved by the employee's Line Manager and Assistant Director. The Learning and Development Manager must confirm budget availability for any training. Managers should discuss training needs as part of the annual appraisal process and this information should be provided to the Learning and Development Manager at the earliest opportunity to assist with budget planning.
- 5.2 The Learning and Development Application Form is accessed via the Staff Intranet, select Human Resources, Learning and Development, Book external training, Learning and Development training application form.
- 5.3 Complete the form, including course details, cost and requirements and benefits to the organisation.
- 5.4 The form will need to be signed by the employee, Line Manager and Assistant Director and forwarded to [Learningdevelopment@cherwell-dc.gov.uk](mailto:Learningdevelopment@cherwell-dc.gov.uk) for processing and booking.
- 5.5 The employee must not book the training as this will be booked by the HR and OD Team. The employee will be notified when the booking has been made.
- 5.6 The training will be recorded on iTrent by the HR and OD Team.

**Appendix 1 – Learning and Development process workflow**



## Learning and Development Training Application Form

This form can be used to apply for Apprenticeship qualifications, Post Entry Training (PET), individual and group external training, courses or conferences. Once completed and signed by yourself, your manager and AD, please send this form to Learning & Development, Human Resources or email to [LearningDevelopment@cherwell-dc.gov.uk](mailto:LearningDevelopment@cherwell-dc.gov.uk). All training will be booked by the Learning and Development team.

Individual Training	<input type="checkbox"/>	Group Training (complete Group Applicant Names below)						<input type="checkbox"/>	
Is this training/course essential/relevant to your role:	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Indicate if PET (Post Entry Training – refer to declaration at bottom of form):	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Briefly outline why you require this training/qualification/apprenticeship and what would be the impact and benefits to the Organisation and to yourself:									

### Applicant Details:

Name of Applicant / group training organiser:		Job Title:	
Department:		Contact number:	
Base Location:		E-mail address:	
<b>Additional Support Required</b> – please indicate if you require any adjustments or have any access requirements for attending the event/course/qualification:			
Do you require additional support?:	Yes:	<input type="checkbox"/>	No: <input type="checkbox"/>
If so, please specify:			

### Training Activity Booking Details:

Training Event/ Qualification Title:	
--------------------------------------	--

<b>Training Provider:</b>		<b>Tel No of Provider:</b>	
<b>Training Venue:</b>		<b>Website of Provider:</b>	
<b>Date of Training Activity:</b>	<b>Start Date</b>	<b>End Date</b>	<b>Email address of Provider:</b>
<b>Total CPD Hours to be recorded:</b>		<b>Any dietary requirements:</b>	

Please give further details that maybe required to book your activity eg workshops you wish to attend?

### Training Activity Costs:

(travel expenses and accommodation costs are met by the Manager's budget)

<b>Course Fee:</b>	
<b>Exam/Registration fee:</b>	
<b>Total cost:</b>	

### Group Applicant Details:

(If this application is for a group activity, insert all applicants below, continue on a separate sheet, if required:

<b>Name of applicants:</b>	<b>Department:</b>	<b>Job Title:</b>	<b>Location:</b>	<b>Contact number:</b>	<b>E-mail address:</b>


**Applicant Declaration for payback of fees for Post Entry Training (PET):**

**If your application is successful and the Council agrees to fund your PET course, any course fees owed (including any costs for books and materials relating to the course) will be deducted from your final salary or any other outstanding payments due to you as detailed below:**

- If you cease employment before you attend the PET training course but the Council has already incurred liability for the costs, 100% of the costs or such proportion of the costs that the Council cannot recover from the course provider shall be repaid;
- If you cease employment during the PET training course, 100% of the costs shall be repaid;
- If you cease employment within two years of the date the qualification was obtained, this also includes moving to another local government post, you will pay back one twenty-fourth for each month of service after the qualification was obtained.
- Payback only applies to PET courses not CPD courses, training or conferences.

By Signing this application form you are accepting the terms set out above for PET applications.

<b>Signature of Applicant:</b>	<b>Date:</b>
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**Application Authorisation:**

<b>Manager:</b>	<b>Signature</b>	<b>Date:</b>
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**Manager’s comments and rationale to support this application:**

<b>Assistant Director:</b>	<b>Signature</b>	<b>Date:</b>
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**Appendix 3 – Learning and Development Post Employment Training (PET) Agreement Letter**

**Gordon Stewart – Chief Executive**



**Private and Confidential**

*Bodicote House*

*Bodicote*

*Banbury*

*Oxfordshire*

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*Please ask for **Teresa Reed***

*Direct dial **01295 221590***

*Email **Teresa.reed@cherwell-dc.gov.uk***

*Our ref*

---

<<date>>

<<preferred\_name>> <<surname>>

<<formatted\_address>>

Dear <<preferred\_name>>

**Course Name:**

You have submitted an application form for a contribution from the Council to your PET fees for the above course/training/qualification and I am pleased to inform you that the Council will be paying the full cost of the fees which, will be paid direct to the course provider.

You must notify Learning and Development to any changes of circumstances that could affect your ability to complete the course/training/qualification.

**Payback of course fees**

Support has been given on understanding that you are committing to the 2 year payback agreement as detailed below:

- If you cease employment before you attend the course/training/qualification but the Council has already incurred liability for the costs, 100% of the costs or such proportion of the costs that the Council cannot recover from the course provider shall be repaid;
- If you cease employment during the course/training/qualification, 100% of the costs shall be repaid;
- If you cease employment within two years of the completion of the course/training/qualification, this also includes moving to another local government post, you will pay back one twenty-fourth for each month of service after the course/training/qualification was completed.
- If you are on a fixed term contract and you leave employment before the agreed Fixed Term Contract end date, the Council will look to recoup under the 2 year payback above. If your Fixed Term Contract date is extended or your position becomes permanent, your employment will be seen as continuous for the purposes of the two year payback

### **Non-payment of course fees**

You shall not be required to repay any of the costs, as detailed above, in the following circumstances:

- The Council terminates your employment except where:
  - It was entitled to and did terminate your employment summarily; or
  - It terminated your employment pursuant to an application by you for voluntary redundancy.
- You terminate your employment in response to a fundamental breach by the Company

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

### **Deduction from Salary**

You agree to the Council deducting the sum owed under this agreement letter from your final salary or any outstanding payments due to you, in accordance with Section 13 Employment Rights Act 1996.

### **Signing this Agreement**

Please sign and return a copy of this agreement to me as soon as possible. Course fees will not be paid until a copy of this letter has been signed and returned, although attendance on the course will be classed as agreeing to the terms as set out in this letter.

Where an increment is due upon completion of your course/qualification, you will need to forward a copy of your Qualification Certificate(s) to HR before the increment can be processed.

Yours sincerely

**Learning and Development Manager**

**By signing this letter, you agree to the above terms and conditions.**

**Signed:** ..... **Date:** .....

**Name of Employee (block capitals)** .....



## Appendix 4 – Apprenticeship Agreement

### Apprenticeship Agreement for Cherwell District Council Staff

The Education and Skills Funding Agency requires anyone undertaking Apprenticeship based training to have an Apprenticeship Agreement which contains a number of mandatory details.

This document outlines these details and contains the general conditions that cover the period of your Apprenticeship based training. The document should be signed by the member of staff undertaking the Apprenticeship, their line manager and the Learning and Development team.

#### Apprenticeship Particulars:

Apprentice name			
Skill, trade or occupation for which the apprentice is being trained:			
Relevant Apprenticeship standard/framework and level:			
Place of work (Service/Team & Location):			
Start date of Apprenticeship		End date of Apprenticeship	

#### Signatories:

Apprentice:		Date:	
Line Manager:		Date:	
Learning and Development:		Date:	

## **General Information for staff undertaking an apprenticeship**

This learning agreement is valid for the duration of the apprenticeship from any point after the initial contract start date for new employees or after initial acceptance of the staff member's application.

The contract of work and terms and conditions of the staff member's post remain the same throughout the apprenticeship training.

Any training and additional work associated with the training programme will cover at least 20% of the staff member's contracted hours for the duration of the apprenticeship.

Typically, an apprenticeship programme might consist of employer-led training, attending training sessions, completing assignments, taking exams and receiving visits at work from external trainers to monitor progress and set new targets.

The training will be paid for via the Apprenticeship Levy and there are no direct costs to the individual involved before, during or after completion of the apprenticeship.

The staff member will be awarded an apprenticeship certification and often a professional qualification as well upon successful completion of the apprenticeship.

Whether you are a new apprentice recruit or an existing staff member completing an apprenticeship as part of CPD you must commit to and dedicate work time for the duration of the apprenticeship in order to complete it.

Activities associated with the apprenticeship training should be completed during your contracted hours.

You must attend all sessions outlined by the learning provider in the training plan and endeavour to make up for any sessions that may be missed due to ill-health or other unforeseeable circumstances.

You must submit any work-based assignments in a timely manner and make sure you attend sessions or any visits from external trainers to monitor progress on time.

If you are encountering problems with completing tasks or attending sessions such as long-term sickness or other unforeseen circumstances that will have a major impact on completing the training you must report this to your line manager in the first instance.

If you are unable to complete the apprenticeship training programme, for example due to long-term health issues, training can be paused until you are ready to resume the apprenticeship.

If you leave the Council before the end of your apprenticeship training, funding will be withdrawn.

### **Line Manager**

You must support the staff member to dedicate at least 20% of their contracted hours to attend training sessions, carry out work-based assignments or learn new skills. We suggest you allow them regular protected time to do this. You will be expected to work with the training provider to support the design and implementation of a training plan for the apprenticeship, to be reviewed and amended throughout, as required. [More information and an explanation of what sort of activities count towards off-the-job training is available from the ESFA.](#)

Day or block release (during normal working hours) to attend the course of study associated with the Apprenticeship will be agreed and granted in advance. This forms part of the apprentice's working time and is included in their paid working hours. If any apprenticeship training takes place outside of

normal working hours (e.g. Open University workshops at the weekend), time should be given off during the working week to allow for this.

You cannot ask the staff member to complete activities associated with the apprenticeship training outside of work time, although they may opt to voluntarily do this.

You must check-in on your staff member undertaking apprenticeship training to ensure things are progressing smoothly, and in the early stages of their apprenticeship you are advised to support them to log their off-the-job learning accurately. The training provider will provide opportunities to formally discuss progress.

If there are problems with attending sessions or completing tasks, for example due to long-term sickness or other unforeseen circumstances, that are having an impact on completing the training, then seek the advice of the Training Provider and the Learning and Development Team.

### **Learning and Development Team**

The Learning and Development team will keep an overview of apprenticeships within the Council and keep appropriate records about who is currently undertaking apprenticeship training.

They may check on progress of individual staff members at any given time, including the start and end of the training to ensure the process is running smoothly.

The team is available to apprentices and line managers should they wish to discuss any aspects of the process or wish to explore problems that may have arisen.

The Learning and Development team will manage the contractual relationship between the Council and the training provider. They will manage payments through our Digital Apprenticeships Service account and should be notified of any problems in Apprenticeship delivery that may arise.

### **Fees and Expenses**

Apprentices are not required to contribute financially towards any part of their training or assessment.

The cost of the Apprenticeship-based training and assessment will be met centrally by the Apprenticeship Levy and paid directly to the training provider, unless additional training costs (e.g. for supplementary professional qualifications) have been agreed with the apprentice's manager prior to the start date.

The Learning and Development Team may agree to fund the cost of re-sitting any mandatory exams for End Point Assessments at their own discretion.