Learning and Organisational Development Policy

platform housing group

Scope of Policy

This policy sets out Platform Housing Group's (the Group's) approach to learning, development and maintaining professional competence.

It covers all learning and development activity undertaken within the organisation, including:

- Mandatory and regulatory training.
- Informal and formal learning.
- Apprenticeships and levy-funded programmes.
- Professional funded qualifications (PFQs) and accredited learning.
- Continuous Professional Development (CPD).
- Leadership and organisational development.
- Support organisational development activity including team effectiveness, leadership capability and organisational change.

The policy also defines requirements for recording, evidencing and monitoring learning to support compliance, audit and competence assurance.

Applicability

The policy applies to all members of Platform Housing Group, including Platform Housing Limited and Platform Property Care.

It applies to:

- All colleagues undertaking learning as part of their role.
- Line managers responsible for the development and competence of their teams.
- Leaders responsible for organisational capability.
- The Learning and Organisational Development (L&OD) function.

1. Policy Statement

1.1 Platform Housing Group is committed to ensuring that all colleagues have the skills, knowledge and behaviours required to perform their roles safely, effectively and in line with regulatory expectations.

1.2 This policy supports both individual development and wider organisational development, ensuring the Group has the capability, capacity and behaviours required to deliver its strategic priorities.

1.3 We will provide access to learning and development opportunities that support both individual and organisational capability, while maintaining a strong focus on value for money and measurable outcomes.

1.4 Completion of learning alone does not demonstrate competence. Colleagues are expected to apply learning in their role, and this will be monitored through performance management processes.

1.5 The Group will maintain accurate and auditable records of learning, qualifications and CPD to demonstrate compliance with internal requirements and external standards.

2. Context

2.1 This policy supports the delivery of the Group's Corporate Strategy by ensuring colleagues are equipped with the capability required to meet current and future organisational priorities.

2.2 It operates within the framework of relevant legislation and regulatory requirements, including:

- Apprenticeships, Skills, Children and Learning Act 2009
- Equality Act 2010
- General Data Protection Regulation (GDPR)
- Health and Safety legislation

2.3 The policy also supports compliance with the Competence and Conduct Standard and reflects the organisation's commitment to maintaining a skilled, professional and competent workforce.

3. Aims and Objectives

3.1 The aims of this policy are to:

- Ensure compliance with the Competence and Conduct Standard and provide an auditable approach to maintaining colleague capability.
- Minimise risk to colleagues, customers and the organisation through effective mandatory and regulatory training.
- Ensure learning and development supports current and future strategic priorities.
- Provide a fair and consistent approach to learning for all colleagues.
- Enable colleagues to access development opportunities, including through the Apprenticeship Levy.
- Ensure investment in learning delivers value for money.
- Promote a culture of continuous learning and personal responsibility for development.
- Support colleagues to maintain and demonstrate ongoing professional competence.

3.2 The objectives of this policy are to:

- Ensure completion of mandatory and regulatory training within required timescales.
- Ensure all colleagues maintain up to date and auditable records of learning, qualifications and CPD on the HRIS system.
- Ensure that professional competence is demonstrated through the application of learning in role and monitored through performance management processes.

4. Policy Outline

4.1 Learning Culture

Platform promotes a positive learning culture that encourages colleagues to take ownership of their personal development and actively seek opportunities to learn and grow. Learning may take a variety of forms including formal training, on-the-job learning, coaching, digital learning, professional qualifications and CPD.

4.2 The Group is committed to ensuring that learning and development opportunities are accessible and inclusive for all colleagues. Learning will be designed and delivered to take account of individual needs, including reasonable adjustments where required, to ensure equitable access and participation.

This includes consideration of:

- Different learning needs and preferences.
- Accessibility requirements.
- Flexible delivery methods, including digital and in-person options.

4.3 Organisational Development

Learning and development activity will support organisational development by building capability, enabling change and improving team and organisational effectiveness.

4.4 Roles and Responsibilities

4.4.1 Line Managers

Line managers are responsible for ensuring their teams have the skills, knowledge and behaviours required to deliver Group priorities.

They are expected to:

- Ensure mandatory training compliance and challenge non-compliance.

- Identify development needs and support ongoing learning.
- Create time and space for learning.
- Support apprentices to meet off-the-job learning requirements.
- Review CPD activity and ensure it meets Group expectations.
- Verify that qualification evidence is recorded on HRIS.
- Monitor competence and address capability gaps.
- Assess application of learning through performance management processes.
- Ensure colleagues attend all pre-booked face to face training that has been approved, particularly where this has been agreed as essential to role or business delivery.
- Monitor attendance and address non-attendance promptly, recognising the impact on budgets and business performance where training places are unused or require rebooking

4.4.2 **Learners (Colleagues)**

All colleagues are responsible for their own development and are expected to:

- Complete mandatory training within required timescales.
- Actively seek development opportunities.
- Record CPD activity and maintain accurate records on HRIS.
- Complete a minimum of three CPD cycles per year where no professional body requirement exists.
- Upload evidence of completed qualifications within four weeks.
- Apply learning in their role and demonstrate competence through performance.
- Attend all face-to-face training that has been booked on their behalf, particularly where this has been agreed as essential to their role or development.
- Provide sufficient notice if unable to attend, gaining approval from their line manager, to minimise financial impact and allow places to be reassigned where possible.

4.4.3 **Learning and Organisational Development (L&OD)**

The L&OD team will:

- Identify learning needs and capability gaps.
- Provide accessible and blended learning solutions.
- Maintain accurate learning records for audit purposes.
- Use data to inform decisions and demonstrate value for money.
- Support apprenticeships and professional development pathways.
- Promote a culture of continuous improvement.

4.5 **Learning Provision**

Learning provision includes:

- Mandatory and regulatory training.
- Apprenticeships and levy-funded programmes.
- Professional funded qualifications.
- Informal learning and development opportunities.
- Coaching and mentoring
- Organisation-wide internal training programmes delivered by the L&OD team or approved internal facilitators.
- Training delivered by external providers where specialist expertise or accreditation is required.

Internal learning programmes will be designed to support organisational priorities, build capability and ensure consistency of approach across the Group.

External training will be used where appropriate to provide specialist knowledge, professional accreditation or development that cannot be delivered internally.

All externally delivered training must be approved in advance and demonstrate value for money and alignment to business need.

All learning provision will be subject to:

- Approval processes in line with budget and organisational priorities.
- Monitoring and evaluation to ensure effectiveness.
- Recording requirements for audit and compliance purposes.

4.6 **Accessibility and Reasonable Adjustments**

The Group is committed to providing accessible learning and development opportunities for all colleagues.

Where a colleague has a disability, neurodiverse condition, learning difficulty or other identified need, reasonable adjustments will be considered to support their participation in learning, professional qualifications, assessments and examinations.

Colleagues are encouraged to discuss any required adjustments with their line manager, the Learning and Organisational Development Team, or the Apprenticeship and Qualifications Team as early as possible to allow appropriate arrangements to be explored with learning providers and assessment bodies.

4.7 **Informal Learning**

Informal learning is an important part of ongoing development and is encouraged across the Group.

Colleagues can access informal learning through a range of methods, including:

- Learning through the Academy.
- On-the-job learning and experience.
- Coaching, mentoring and feedback.
- Job shadowing or secondments.
- Online resources, webinars and research.
- Networking and knowledge sharing.

The most appropriate learning approach should be determined in discussion with the line manager, considering:

- Individual learning preferences.
- The urgency of the learning need.
- Cost and availability of options.

Informal learning should form part of ongoing CPD activity and be recorded where relevant.

4.8 **Coaching and Mentoring**

Coaching and mentoring may be used to support individual development, leadership capability, career progression, team effectiveness and organisational change. Support may be provided through internal or external coaches and mentors, depending on the development need, level of expertise required and organisational priorities.

Coaching and mentoring arrangements will be reviewed periodically to ensure they continue to support agreed development objectives and represent value for money.

4.9 **Arranging Learning and Professional Funded Qualifications (PFQs)**

Formal Request for Professional Qualification / Accreditation

Requests for formal learning can be made at any time using the Platform Funded Qualification (PFQ) Learning Form. This may include a professional qualification, accredited course or apprenticeship.

All decisions relating to funded learning will be made on a fair and consistent basis, aligned to role requirements, business need and development priorities.

Colleagues must discuss requests with their line manager and gain approval prior to submission. Colleagues must have successfully completed their probation period, unless the qualification formed part of their recruitment offer.

The Apprenticeship and Qualifications Team will review all requests and consider whether they are suitable for funding via the apprenticeship route to maximise use of the Apprenticeship Levy. Where appropriate, the colleague will become an apprentice for the duration of the programme and all existing terms and conditions will remain unchanged.

4.10 **Apprenticeship 'Off the Job' Learning**

Colleagues undertaking an apprenticeship are required to complete a minimum of six hours per week 'off the job' learning, in line with legal requirements.

This time must:

- Be completed within normal working hours.
- Be planned and agreed with the line manager.
- Be recorded appropriately for compliance purposes.

Off the job learning may include:

- Face to face learning such as lectures or training sessions.
- Role playing or simulation activities.
- Online or distance learning.
- One-to-one coaching, shadowing or mentoring.
- Industry visits or manufacturer-led training.
- Participation in competitions.
- Assignments and project work.

A blended approach to learning is expected. Where colleagues are unsure what constitutes off the job learning, guidance should be sought from the Apprenticeship and Qualifications Team.

4.11 **Professional Funded Qualifications (PFQs) and Sponsorship**

Where an apprenticeship is not appropriate, colleagues may apply for a Professional Funded Qualification.

A sponsorship agreement will be put in place where the Group is making a significant financial investment in a colleague's development.

This applies where:

- A single qualification exceeds £3,500
  or
- The combined value of multiple qualifications within a financial year exceeds £3,500

A sponsorship agreement ensures there is a clear understanding between the colleague and the Group regarding the level of investment and expected commitment.

The agreement will:

- Set out the financial support provided by the Group.
- Define expectations for attendance, engagement and successful completion.
- Confirm the requirement to remain with the organisation following completion.
- Include provisions for reimbursement of costs should the colleague leave the organisation within two years of completing the qualification(s), or fail to complete without agreed mitigating circumstances.

The Group will also subsidise the purchase of relevant course materials, up to a maximum of £150.

All sponsorship arrangements will be discussed and agreed in advance of funding being approved and will form part of the overall development agreement between the colleague and their line manager.

4.12 **Commitment to Learning**

Formal learning represents a significant investment by the Group and the colleague.

There is an expectation that colleagues fully commit to completing their qualification, including undertaking study in their own time where required.

The Group will consider requests for time off to undertake learning in line with the Apprenticeships, Skills, Children and Learning Act 2009.

Where a colleague is unable to continue or complete their qualification, they must inform the Apprenticeship and Qualifications Team at the earliest opportunity to seek support.

4.13 **Study Leave and Exam Arrangements**

Where a course requires examinations during working hours, colleagues will be supported as follows:

- One day of paid study leave per exam.
- One day of paid leave to sit each exam.

Where a colleague fails an exam:

- On first failure, the same entitlement to study leave and exam leave will be provided for resits.
- On second failure, any further study or exam time must be taken as annual leave.

Colleagues will be entitled to take one days leave for their own graduation ceremonies which were paid for and supported by the organisation.

4.14 **Assignments and Coursework**

Colleagues undertaking a professional qualification (excluding apprenticeships) will be entitled to:

- Half a day of paid leave per assignment.

Extensions must be agreed between the colleague, course provider, line manager and the Apprenticeship and Qualifications Team. Where additional support is required, a review meeting will be arranged to agree an appropriate way forward. Failure to complete assignments or coursework which results in non-completion of the qualification may result in costs being recovered in line with the sponsorship agreement.

4.15 **Recording of Qualifications**

All colleagues undertaking professional qualifications or funded learning are required to upload evidence of completion (for example certificates or confirmation of award) onto the HRIS system within four weeks. This supports compliance, audit and the Group's competence assurance requirements. Line managers are responsible for ensuring records are accurate and up to date.

4.16 **Data Protection and Use of Learning Records**

Learning and development records, including CPD activity and qualifications, will be collected and maintained for the purposes of:

- Demonstrating competence and compliance.

- Supporting performance and development discussions.
- Meeting audit and regulatory requirements.

All data will be managed in accordance with the Group's Data Protection Policy and applicable data protection legislation.

The Group will ensure that any personal data collected as part of learning activities is proportionate and limited to what is necessary for the purpose of managing development and compliance.

Where external providers are used, appropriate data protection arrangements will be in place to ensure personal data is handled securely and in line with legislative requirements.

4.17 **Attendance at Learning**

Colleagues are responsible for attending all planned learning activities. Where attendance is not possible, colleagues must inform the L&OD team at the earliest opportunity.

Consideration will be given to individual circumstances where attendance is impacted by factors such as health, disability or caring responsibilities.

Failure to attend without adequate notice may result in costs being recharged to the relevant budget or impact future access to funded learning. The Group monitors non-attendance, particularly in relation to mandatory and health and safety training, to ensure compliance with duty of care obligations.

4.18 **Continuous Professional Development (CPD)**

CPD is required to maintain professional competence and may be subject to internal and external audit. All colleagues must take responsibility for maintaining and evidencing their development.

Colleagues who are members of a professional body must meet that body's CPD requirements. Where no formal requirement exists, Platform requires a minimum of three documented CPD cycles per calendar year.

Each CPD cycle must include:

- A development activity (formal or informal learning).
- Reflection on learning.
- Evidence of application in role.

All CPD activity must be recorded to provide an accurate and auditable record. CPD should be recorded on the Group's HRIS system. Where this is not available, colleagues must record activity within their 1:1 (Bring Your Best) documentation or

other agreed development records. Records must clearly evidence learning, reflection and application.

Line managers are responsible for reviewing CPD records to ensure they are complete, up to date and appropriate to the role.

4.19 **Application of Learning**

Completion of CPD activity alone does not demonstrate competence. Colleagues are expected to apply learning in their role and demonstrate this through their behaviours and performance.

Where learning is not applied, this will be addressed through the Group's performance management processes.

4.20 **Professional Subscriptions**

Following successful completion of probation, colleagues are eligible for one professional subscription to be funded by the Group.
Where a colleague is required to hold a professional or statutory membership for their role, this will be supported in addition to any personal subscription.

Colleagues must let the L&OD Team know when their subscription needs renewing.

4.21 **Team Development and Away Days**

The Group recognises the value of team-based development activities, including away days, in supporting team effectiveness, engagement and performance.

Team development activity is intended to improve team effectiveness, collaboration, and alignment to organisational priorities.

Where funding is requested through the L&OD budget, activities must include a clear development or team effectiveness component aligned to business need.

This may include:

- Team development sessions (e.g. communication, ways of working, team dynamics).
- Facilitated workshops linked to team or organisational priorities.
- Structured reflection or planning sessions.

Activities that are solely social or recreational in nature will not be funded through the L&OD budget.

Where appropriate, a combination of development activity and team building may be supported, provided the primary focus is on improving team effectiveness.

All requests must:

- Be agreed in advance with the relevant senior leader.
- Demonstrate a clear purpose and expected outcome.
- Represent value for money.

4.22 **Travel and Expenses for Learning**

The Group will aim to book training venues in locations that are accessible for colleagues. Where this is not possible, due to home location or external provider requirements, travel and accommodation will be supported in line with the Group Travel and Expenses Policy.

Where appropriate:

- Accommodation may be provided where travel time is excessive or where courses start early.
- Overnight accommodation requires prior agreement from the line manager, as costs will be charged to the relevant budget.
- Travel to training should be undertaken using the most appropriate and cost-effective method, including public transport or car.

All travel and subsistence expenses must be claimed through the HRIS expenses system in accordance with the Travel and Expenses Policy.

5. Equality and Diversity

5.1 We are committed to fairness and equality for all regardless of age, gender reassignment, marriage or civil partnership, pregnancy, disability, race including colour, nationality, ethnic or national origin, religion or belief, sex or sexual orientation, family circumstances or offending history, as referred to in our relevant Group policies. Our aim is to ensure that our policies and procedures do not create an unlawful disadvantage for anyone, either directly or indirectly.

5.2 Our aim is to ensure that our policies and procedures do not create an unfair disadvantage for anyone, either directly or indirectly.

5.3 A Data Protection Impact Assessment (DPIA) and Equality Impact Assessment (EIA) have been undertaken for this policy and no negative impacts on people with protected characteristics were identified.

6. Complaints

6.1 Should the need arise to make a complaint, please email the Head of Learning and Development.

7. Monitoring and Review

7.1 The next policy review is scheduled for 2029 and then every three years thereafter.

7.2 We may update this policy from time to time to reflect changes in the law, regulations, or how we operate.

7.3 Approved documents are valid for use after their approval date and remain in force beyond any expiry of their review date until an updated version is available.

8. Associated Documents

8.1
- Performance Management Policy
- Travel and Expenses Policy

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