PREPARATION OF A PERSONAL TRAINING, DEVELOPMENT AND LEARNING PLAN

GUIDANCE FOR MANAGERS AND STAFF

1 Introduction

1.1 As part of our overall 'People Strategy' the SNBTS is committed to ensuring that every member of staff has an individually tailored training, development and learning plan.

1.2 This guidance note details the proposed approach for staff working within both Processing and Testing Units.

1.3 It should be noted that this is not the full Performance Review and Development system although it is hoped that this documentation will complement that process when it has been finally agreed and introduced.

1.4 The process is based on three types of forms for each group of staff i.e. MLA, BMS1, 2 and 3. Form 1 is a list of the competencies/tasks for each of the different staff groups. Form 2 is a list of possible development opportunities for MLA and BMS staff. Form 3 is to record training and development needs arising from discussion and completion of forms 1 and 2.

The use of these forms is described in greater detail in the following sections.

1.5 It should be noted that this documentation may not cover every task or development need but an area is provided to record additional comments/needs of individual staff.

1.6 All staff are reminded that this is very much a two way process involving discussion and agreement between manager and staff.

1.7 This approach recognises that 'on the job' training is as important to staff and the organisation as is attendance at courses. They both have an important role in the development of staff individually, in improving their performance in their current roles and in preparing to meet their future career aspirations.

2 Documentation

2.1 MLA and BMS1, 2 and 3 Form 1 – General Competencies

2.1.1 These forms list the basic tasks, and therefore competencies, that staff in the various grades could be expected to perform as part of their basic duties.

2.1.2 Completion of these forms will therefore help identify possible training opportunities and improve the skills level of all staff.

2.1.3 Each member of staff should receive a copy of the form relevant to their grade prior to the meeting with their manager. Prior to the meeting they should consider their competence against each of the task areas listed and any areas of improvement. The form can be completed prior to or during the meeting.

2.1.4 Complete the form by assessing your competence/ability/understanding for each of the task areas. Using a scoring system of 0 to 5, record 0 if you have never performed the task, 1 if you have but not in the last 12 months and 2 to 5 depending on your competence i.e. record 5 where you are fully competent and do not need further training.

2.1.5 Staff should not worry if they are not competent in a number of areas as the purpose of this process is to identify this and plan to rectify where possible, necessary or

desirable.

Where staff and managers have major differences in opinion on competence in any area this should be recorded in the 'Comments' section. These will be very few in number and in most cases will be resolved through discussion. If required a more senior line manager will review.

2.1.6   Record, in the comments section of the form, any comments or additional tasks not covered in the list, but considered important to the member of staff or manager.

2.1.7   The lists have been prepared using tasks performed in both P&T sites. It is therefore possible that some are not currently relevant to all staff in both units.

2.1.8   MLA   Form1   commla05.rtf
          BMS1   "General Competencies"   Form1   comml105.rtf
          BMS2   Form1   comml205.rtf
          BMS3   Form1   comml305.rtf

To ensure the correct document versions are in use in all P&T laboratories the file names of all current forms are shown above. Now that these have been finally agreed it is proposed that no alterations will be made for at least one year. 'Comments' section will be used to record suggested changes for the next year.

2.1.9   It is obvious from this form that it would be possible to add up a score and then rate each member of staff. It is very important to realise that there is no intention to do so and it will not happen. This is not the purpose of the process.

However, an over all score will be calculated for all staff. This will be used as a performance indicator from year to year. For example:

150 Staff with 20 tasks each, gives a possible total of 15000 if everyone was fully competent (score 5) in every task. If the total for this year was actually 8000 i.e. 53% and for next year was 10000 (67%) we would have objective evidence that the process was working and staff skill levels were improving. This is obviously only a very broad indicator but useful nonetheless.

2.2   MLA and BMS1, 2 and 3 Form 2 – Development and Learning

2.2.1   These forms list a number of Development and Learning opportunities that may be appropriate for staff to assist in their development.

2.2.2   As above these lists are not exhaustive and any other suggestions/needs should be recorded in the comments section of the form.

2.2.3   There are major differences in what is likely to be available for MLA and BMS staff due to the need for more formal management development of some BMS staff.

2.2.4   One set of development opportunities has been prepared for all BMS staff. However, approval will only be given to those appropriate to the role, position, grade and needs of the individual staff member. For example, BMS2 will require more management development than a BMS1 due the differences in their daily responsibilities.

2.2.5   Each member of staff should receive a copy of the form relevant to their grade prior to the meeting with their manager. Prior to the meeting they should consider their development and learning needs and any areas of improvement. The form can be completed prior to or during the meeting, but it is probably more appropriate to complete in discussion with the manager.

2.2.6   Although a number of areas may be identified as opportunities for improvement it is

important that these are prioritised in relation to the needs of the staff, the organisation and the ability to successfully deliver the required development within the agreed timeframe. It must be remembered that course places are normally limited and this must be taken into consideration when preparing any plans.

2.2.7   It is suggested that in general no more than 2 or 3 development initiatives be agreed within each period. However this will depend on the resources/development required and the urgency with which it is needed. As well as agreeing actual needs managers and staff must remember that they also have a responsibility for ensuring it is successfully delivered.

2.2.8   Please note that the Supply Chain Directorate has already agreed that all staff will participate in the Quality Awareness day and the Induction programme. Remaining staff who have not attended these events will have them included in this years development plan

2.2.9   MLA   Form2   devmla05.rtf
         BMS1   Form2
         BMS2   "Development and Learning"   Form2   devmls05.rtf
         BMS3   Form2   (same form for all BMS)

         To ensure the correct document versions are in use in all P&T laboratories the file names of all current forms are shown above. Now that these have been finally agreed it is proposed that no alterations will be made for at least one year. 'Comments' section will be used to record suggested changes for the next year.

2.2.10 Managers should adopt a helpful, supportive and encouraging approach when assisting staff to complete this documentation. They should listen carefully to staff concerns and record them accurately. They should also ensure discussions include future career development and opportunities.

2.2.11 Please remember we cannot cover all development needs in one year. The purpose of this process is to identify prioritised needs and plan to deliver over the longer term.

2.3   MLA and BMS1, 2 and 3   Form 3 – Personal Training, Development and Learning Plan

2.3.1   This form documents the training, development and learning plan for each member of staff for the coming year. It can only be completed during the actual meeting with staff member.

2.3.2   The same form is used for all P&T staff groups (prdall05.rtf).

2.3.3   Those actions agreed as important on completing Forms 1 & 2 should be transferred onto this form.

2.3.4   The learning approach, resources required and timescales should also be completed

2.3.5   Each should then be given an "Objective Number" based on agreed priority.

3   What Do We Do With This Documentation?

3.1   Initially the documentation will be retained in a secure location by the Line Manager.

3.2   When the majority of staff have completed the process, the Line Manager and Training Co-ordinator will examine each staff members requirements and collate into an overall plan.

3.3   Checks will then be made to ensure that resources, places on courses etc. are available and that it is possible to meet each and every staff members needs.

3.4   For example it may not be possible to send all staff on a particular course due to limited availability. If this is the case the member of staff will be informed and agreement on other needs sought and incorporated into the plan.

3.5   When the overall plan is completed and agreed each member of staff will receive a copy of their own plan for the coming year. Any changes since the initial discussion will be recorded.

3.6   The Training Co-ordinator/Line Manager will store/file original copies of all forms, again in a secure location.

3.7   It is the responsibility of the Line Manager and Training Co-ordinator to ensure agreed actions are carried out as planned. Staff also have a responsibility and commitment to ensuring they make every effort to complete agreed actions.

3.8   Completed training and or development initiatives will be recorded on the individuals Personal Training, Development and Learning Plan (Form 3).

3.9   Staff must inform the Training Co-ordinator and Line Manager if agreed plans have not been achieved, for whatever reason.

3.10   It is hoped that these plans will form a routine part of the Performance Review and Development process when this is finally agreed and implemented.

3.11   Comments made by staff/managers on the process and/or documentation will be compiled into a single report. This will be used in updating the documentation for the next years cycle.

4   Other Useful Documents
- Supply Chain Operational Plan 2005 – 2006
- The Learners Guide to Management Policy Training (June 2002)
- Common Services Agency – Learning Centre Catalogue – Current Version.
- Performance Review Guide – Issue 1 7Th May 2002