

**SCRUTINY AND AUDIT COMMITTEE - – EVIDENCE GATHERING SESSION
CROSS SERVICE LEARNING AND DEVELOPMENT BUDGET
COMMISSIONING AND DELIVERY**

**9 SEPTEMBER, 2013
LEAD SERVICE BRIEFING**

Present: Councillors Gillian Owen (Chair), Richard Thomson (Vice Chair), D Aitchison, K Farquhar, J Ingram, J Latham and I Tait.

Apologies: N Cullinane, S Duncan, and C Shand.

In attendance: Laura Simpson, Head of Service (Human Resources and Organisational Development) and Paul Henderson, Learning and Development Manager.

PH It's ironic that when I was here last week, I was talking about power point and the "stand and deliver", classroom approach as being a thing of the past, and now here I am about to do just that. It does have a place, occasionally. So, what I want to do with you this afternoon is to give you an overview, to hear about the employee journey, what it's like from beginning to end the Council. We'll talk a little bit about learning and development budgets, although in reality most of the information given about that will be provided by the service witnesses, and about evaluation, which will be a bit more of a conversation than anything else. Links to the website pages will be shown as we go through this afternoon.

In terms of the employee journey, what we're going to look at is this idea of Entry and Exit, when someone joins the organisation, through until when someone leaves. What do they get, and the points in between.

We will consider how learning is identified, planned and delivered, and paid for, and if there are any improvements which can be made. In terms of Learning and Development Budgets, what you want to do, I understand, is to look at how these are managed at Corporate, Service, and at local level, internally and externally, and see if there are ways to make better provision; understand how learning and development money is invested.

The third issue of this investigation is to understand how Learning and Development is currently evaluated, and whether there are better ways of assessing the "So what" factor. We invest a lot of money in these things, and the question is what "What benefit do we get?"

THE EMPLOYEE JOURNEY

The Recruitment Process

I would argue that it starts with the recruitment process, maybe even before, so what kind of impressions do people have of Aberdeenshire as a Council? Before I came to work here four years ago, I had a pretty positive impression of Aberdeenshire Council, that couldn't be replicated with other Councils, that I was aware of. I think

that's quite important, because if you are a prospective employee, you want to work for a good employer. Terms and conditions are important but people also wonder, "What are they like to work for?"; "What kind of regime operates within the Council?"; "How will I be treated as an individual?" We need to consider how the Council represents itself in the recruitment information. These things I think are all pretty critical.

When people are appointed and come in, they are started on the Induction Process. People will get information in advance; an employment pack. This will give them all kinds of information on their job, their job description, information on how to get paid, and standard forms to fill in. How that is presented is really important, in terms of someone's initial employment experience. My impression is that those early days are really important for someone coming to work in a particular location and job. They decide if they'll come back the second day; sometimes people decide quickly whether it's a good place to be and this assessment stays with them.

Corporate Induction

You may be already aware of this course, which previously was a one day programme, then curtailed to a half day programme, which required people to turn up at Woodhill House to get the corporate messages and intended to instil a sense of belonging to the Council. This face to face delivery caused a number of difficulties for some services, in particular schools and care settings, and we have now set up an online corporate induction, which covers similar ground to the course that you might attend in one of the Council Chambers. It is proving pretty popular; we have had in excess of 600 going through the online programme. One of our team leaders, Richard Tucker, is going to take you through ALDO and how that operates. It will give you a flavour of that kind of things that are available on ALDO. It's easy to log in, use your payroll number, and you will be prompted to create your own password. So, typically the induction starts with the Chief Executive introducing himself; a Director will come and also similarly explain the structures of the Council and how it works. There are videos embedded in the system, such as Colin welcoming people to Aberdeenshire Council. The induction also includes information on Customer Service, on procurement, HR and Organisational Development, for example, with lots of supporting information. Right at the end, there is a "Key Messages" quiz, so people fill that out. This enables us to track who has completed the online course and gives us data about what people have been covering.

IT – Is the course self-contained within ALDO, or is a member of staff on the phone, or video conferencing to deal with queries as they arrive?

PH No, it is self-contained on ALDO. We insist on that team leader or above in the organisation, have to come to a face to face event. The logistics, of trying to bring to a central point literally thousands of people over the year when recruited, are unsustainable. We encourage staff, having completed the training, to discuss the induction to their line manager. If there are any questions arising from the e-course, they would speak to their line manager about that.

IT – With how many people, team leader level and above, would you be dealing, on a face to face basis?

PH About 60. But the reality is, because we have now got the online programme, there's a lot less coming to the corporate face to face induction; the number at team leaders and above cannot be compared with the whole workforce.

GO – Looking at attendance reports, people attending the induction courses was very low. By having it now on ALDO, has that improved the amount of people actually viewing it or pitching up?

PH No, numbers have not increased to the levels we would have expected. The most recent reports and statistics that we've pulled together isn't showing that, so far. We have a very complicated database system of three different databases reports that to pull together to produce these reports. When the new HR I-Trent (Payroll and HR) system is up and running next year, it will be much easier to produce more reliable reports. Management Team regularly looks at Induction participation. Part of this is that people need to be more aware that the online programme is available, so I think there is potential for greater uptake. There seems to be a high level of commitment at Director and Head of Service level, but somehow this does not always translate attendance to where it should be.

GO – We can feed that back; I have already written to all heads of service to highlight that we have concerns about the low attendance, and asked why, even accepting the difficult logistics for staff such as home carers and supply teachers in some areas.

JI – Could it be that people are not coming to this face-to-face, because they have come to a similar induction for a previous post, with the authority?

PH The statistics that we collect are in relation to new starts. Actually, what you're suggesting might be happening, where you've got someone who's been around and shifted jobs, coming to corporate induction, but that should improve the figures, rather than reduce them.

This is the page on arcadia that people go to if they are new starts, that give lots of information about the Council. For example, this one talks about the vision statement. We have prepared guidance on induction packs for managers, one for service based induction that they can use to customise induction at a local level, and one for those in managerial positions.

IT – Will you be showing us that in the ALDO demonstration?

PH Not necessarily, we can leave it to the ALDO demonstration, or we could give you links, and you can have a look for yourself? I will show you one in that case. So, this is the guidance and support pack for service induction. It's basically helping services to think about how they go about the induction process for new people arriving, taking into account how people might be feeling on their first day etc. There are checklists to help them plan what they are going to do. From the basics of where the employment is, to how the terms and conditions work, to what the duties of the job are, to what the service does, to what their team does and so on. The guidance covers quite a wide range of things. As well as the corporate induction, we just want

to reiterate what we are here to do, and how we want employees to behave. It should be tailored to meet the needs of the individual.

IT – How do you tailor it to the individual at this stage?

PH You would know what the individual's job specification and job description is, particularly what are you here to do? For example, they might work with the waste services, picking up bins, so you may want to talk to them about customer services, for example, what that means in their context.

IT – What you're doing with this, is giving managers guidance on how to compile their own induction programme, part of which would be common to all employees, and part of which would be service specific. Who moderates the programme, is that left to the manager?

LS – We have just developed a service induction programme with Corporate Services. Alison Mackenzie, from ICT, could let you see what it looks like, if that would be helpful? That would bring a flavour for each service and what they are planning to do, if that would be useful?

Employee Annual Review EAR

PH In terms of the EAR, once people are inducted, know what they are supposed to be doing, with the relevant information they need to do their job, but quite early in the induction process, you would have an initial Employee Annual Review. Sometimes known as appraisal, the EAR looks at where you've been; if you've been around for a while in your job, but also looks at development needs for new starts. What have you been doing? How have you got on with the targets and objectives set last year? What kind of training have you done, and what did you learn from that? Where are you now in your career; are there things in your career that you would want to develop further? Some officers get these annually; others, (such as part time cleaners) might only get one every 2-3 years; the process needs to be applied as appropriate.

We're now helping the services to tailor the annual review process to the specific roles that people are undertaking. We have to be realistic about what process that fits for a particular person in a particular job. As well as planning ahead, this would be part of the process to identify learning needs for the coming year; might be particular courses and qualification. That's not the only time you would do identification of learning; that would be done on an ongoing basis.

There is a separate process for chief officers; their "EARs" are actually called an appraisal. The leader of the Council, the Provost and the other chief leaders are responsible for the Chief Executive's appraisal.

KF – You mentioned cleaners, carers and road workers etc. What sort of reviews would they get, because how do you identify, for someone who's doing roughly the same sort of job year in, year out, positive things can you do for them, so that they enjoy their role?

PH I see it as an opportunity to have the kind of conversation that you might not normally have with the person who line manages you. While there are very formalised processes, it's often just about sitting down with the person and saying "how do you feel you're getting on with your job, what are the things that you appreciate about your job, are there ways in which we can make your job better, within reasonable limits, is there anything you want to do to make your job different?" I think you have to moderate the conversation you have depending on, not so much the level that someone is at, but the job that someone is doing. That is partly why we are reviewing the standard forms and format that we have been using for the EAR process, because, for some people, it doesn't really work. If you start using fancy language, people get lost and don't really engage with the process at all.

KF – What about conflict resolution? Saying to a line manager, that they would like new equipment or something, but the line manager says “no”, and that’s end of discussion.

PH That would apply beyond EARs, it could apply at any point, where someone needs something to the job, so you could be in to the kind of management system that operates locally, and it's open to individual, not satisfied with the line manager, to go above them. I appreciate it's not always easy for people. That's what I would advise people, that if they're not happy with something, they should reason with line managers.

KF – Part of the induction should be to say if they're not happy in the process, then just to go further up.

PH Colin says at corporate induction; "if you're not getting results, come and see me". So I think the message is there already through the organisation. Whether everyone here is clear and understands what it means, I couldn't really say.

LS – There are also routes through employee representatives, through trade unions – coming up through our joint consultative committees at service level, and trade unions. If needed, there are grievance procedures as well.

Compliance Regulation

PH There are Health and Safety issues that have to be complied with. Depending on the particular job, there might be a fairly light touch, or need for a heavy input. For example, if you work in the care setting, you would need first aid, manual handling training, training in how to manage difficult clients, to understand medication and how to dispense it appropriately, to understand assessing risk, and so on. Legislation is another compliance issue, for example, for data protection, equalities and so on; people need to know the rights and wrongs of how they deal with IT, and with colleagues and customers. There are also internal compliance issues, such as financial regulations, including procurement rules, these will be relevant to anyone managing any kind of money.

The other compliance issues might relate to the requirement of a particular government body for someone to have a minimum level of qualification. For example, that applies to carers. The Scottish Social Services Council requires them to have certain levels of SVQ's. This qualification bar applies also to teachers and

other professionals, such as engineers and lawyers. In Learning and Development, we need to support services with this. Not everyone comes ready-made, as a full package, with all the qualifications in their rucksack; you do have to help people fill up their rucksack and help them carry it.

Specific Job Related

We touched on that a bit with induction, but inevitably, if someone is on a career path, or developing within a service, there may be particular job related qualifications needs. One example might be drivers of lorries and other council vehicles need to have going continuing professional development over a five year period, so we have to ensure they get continual input to build up those hours over that time frame. In other sectors there could be things like working at height, customer services.

Career Development / Progression

We have several career development schemes within the Council, and we need to make sure there are opportunities for people to develop their career pathway. Also, internally, you need to be thinking about succession planning, how the current leaders will be replaced. We need to know if we have successors coming through the system. We seek to give the people in the Council the right skills and abilities to be able to apply for the top jobs, as they come up, rather than just rely on recruitment from the outside. So, we have programmes to help that. We have a new programme for leaders, called Future Leaders, and we have previously run programmes, for people aspiring to be service managers, which was called ACE. (Aberdeenshire Career Exploration).

Corporate Requirements/Initiatives

It may be that we're developing our own initiatives; I mentioned equalities, financial procedures, but there might be specific management or leadership programmes that we want to run, and we are quite active in developing our own leadership development programmes internally.

Lifelong Learning

Something that we aspire to; in our staff we have a lot of community assets working for Aberdeenshire Council. The more we are able to develop our employees, and develop the capabilities, the more they might use those capabilities in their own communities. So there is a kind of win-win there. Sometimes I think it's not recognised very clearly that there is that potential in what we do.

IT – New teachers are appointed, they have to go through a probationary period. It was in relation to the compliance and regulation, because there are more and more new regulations. Do our staff have a formal probationary period like that, or are they just flung in, and told, “When you're in, you're in”?

L.S – We are fairly robust on the teaching side, for the probationary year. Later in your evidence sessions you will meet colleagues from Education side; they can talk you through that. We have traineeships, where we have posts in place for a specific period of time, but we don't automatically have a probationary period for everyone who starts with the Council. We are recognised as one of the best in Scotland for our probationary mentoring schemes in Education. It's a fairly compressive programme.

IT – No, it wouldn't be necessary for all, but do you have it for some employees, apart from teachers?

L.S – It tends to be more of career grade schemes, and the traineeships, over a fixed term period. I think Philip McKay is trialling one, it may be worth asking more about that support.

IT – So, is the proper term is mentoring, rather than progression?

L.S – We have a lot of mentoring programmes across the board, buddy schemes.

On the matter of being assured officers are equipped to cope with all the demands made of them in as short a time as possible, we are also looking at a way of checking that managers have completed certain programmes, so that we are confident that they have had the right grounding, in management knowledge and skills, rather than assuming that just because we've hired someone, that they are ready to do it?

IT – Have you ever found that the system exposes the Council to risk, of any deficiency in the system of the non-recording of necessary compliance standards, or failure to provide courses for staff?

L.S – Norrie Crichton is our Risk Manager, and we do work very closely with him in all elements of risk associated with that. We undertake a lot of internal assessments in addition to health and safety audits. We seek to establish if training is up to standard, if there are any elements of risk. We have outside issues as well, so we have HMIE coming in looking at schools, and they can identify areas for skills and training and development. The Care Commission similarly assessed Social Work establishments. In the ten years I've been here, I'm not aware of any gaps at all, in any way shape or form. If any were identified, they would be addressed.

I think it's fair to say that we are improving how we record and keep databases up to date.

Leaving

PH When people leave, we have a corporate pre-retirement course that can be undertaken up to five years prior to retirement, to help them plan financially for what they're going to do when they retire. Also practically, what are you going to replace not having a job with? We run along with Aberdeen City, we host it, and organise it, but we also get people from Aberdeen City, and from other external agencies, and partner agencies to attend.

LEARNING AND DEVELOPMENT POLICY

PH I'm not going to spend a lot of time on the detail of this. It highlights the Council's commitment to employee development; what we will do, and what our policy is in relation to learning and development, set out in a number of different areas e.g.:

Equity of resource allocation; so you don't just spend your money on senior managers.

Funding arrangements for “Approved Training”; Approved training would get paid for. With “supported training”, you might get a proportion of it paid. There are also detailed arrangements for clawing back money if people leave, taking all their learning and qualifications with them, and we don’t get any benefits.

Need for Learning and Development Strategy

This explores the idea of lifelong learning, and outlines the responsibilities of various parties, management teams, and myself, as Learning and Development Manager, and other managers that are in charge of individuals.

IT – I find what you’re saying very interesting and very informative. There has been some history of employees leaving from this Council, and going to higher paid jobs. What kind of claw back procedures do you have?

PH If someone has to be approved, or even supported, to attend a course that is expensive. For example it might be an HNC at university which may cost £3,500. If it’s a key part of their job that they have that qualification, then the Council may pay for it. But if it’s not, and is something that helps the person in their own personal career development, then the Council would look, subject to resources, at paying a proportion of the cost. In either case we would ask them to sign a pre-training agreement that sets out how much support they’ll get, what they’ll put into it, and what proportion we would reclaim back, if they left early. That would be a formal document. We have a ceiling of £500, below which we don’t chase repayments, because the cost to process that is more. There has to be some sort of ceiling. I do occasionally get queries from services about “this person has left, and we had this agreement, but they’re not willing to pay up”. Our response is to ask “how tight was your agreement with them”; from the outset the contract is really important.

JI – Do you have a time element put into place, for certain courses, you might be there for five years, after you’re completed the course. Others, you may only need a couple of years?

PH Yes, there is a time limit. I think it sits at no more than about two years. So, if you completed the course two years ago, and you’re leaving right now, we think “well, we’ve had two years’ of benefit out of your training”. I think that’s pretty fair.

KF – What about apprenticeships, do they have to stay on after they have finished their actual apprenticeships?

PH I’m not an expert on apprentices, but I understand that would not be the case. They come and complete the apprenticeship, but there is no guarantee of a job at the end of an apprenticeship.

LS We have tried to do quite a lot to develop this area. We guaranteed 15 apprentices this year. The Council has publicly stated its commitment to the employment of young people, including different arrangements for “modern apprenticeships”, in non-traditional areas. Some of this is part funded by the government.

GO – So that’s Philip McKay, whose evidence session is coming up. We can ask him.

PH The last part to mention here is the Council’s partnership agreement with the trade unions, about the support they provide to employees. The agreement also establishes various employee learning records that we will hear about throughout this investigation, which we use for learning.

LEARNING AND DEVELOPMENT STRATEGY

PH This strategy, running from 2011-13, is currently due for review. We will report to the September P&R committee, setting out the progress that has been made on implementation – we update progress on an annual basis. This is just to highlight to members all thinking on learning and development, what the critical things are, in relation to employee development. You will see in the document that it sets it out under three main headings.

Employee Development

PH Relates to a comprehensive and consistent corporate induction process, and the continuing development of employees. There are lots more detail about how to do that in the strategy.

Leadership and Management Development

PH Focuses on developing leadership management behaviours; not just theory, which often is what managers and leaders tend to get. They go on a course and learn a bit about theory, but we’d also expect that they may also learn about themselves. We are interested how people reacted on a day to day basis, how they interact with their direct reports, their line managers, and so on.

Elected Member Development

PH What we want to do is ensure that all elected members comply with the on-going Continuous Professional Development (CPD) requirements. There is a requirement to have a minimum of 36 ¼ hours of CPD every year. I am sure most people are doing well in excess of that, because you can count lots of different things. We have linked into area committees, so we can get data from area support people, back into the systems so CPD records can be updated, but it is primarily the responsibility of each councillor to ensure the records are correct.

THE CHANGING WORLD OF LEARNING

PH The learning world is changing. In particular, it has been changing within Aberdeenshire Council, not necessarily everywhere else. I think that the enlightened corporate sector has been changing for quite some time, but in the public sector, we’ve been a bit slow in reconsidering how we embed learning within the organisation. We still use the old methods because we think they work, but actually, if we really reflect on it, they don’t always work very well. Taking traditional classroom learning and people sitting being “talked at” – this is not always successful. The overlap between what people hear on the day, and what they can recall a week later, is not very great; it is often quite small.

Old Ways

- “Listen and learn” was previously thought to be the way to do it. This was how we learnt at school, you listen and recall – to give the idea that telling is enough.
- “Teacher knows best”. You have the expert trainer, standing up front with all the knowledge, imparting that knowledge onto participants.
- Classroom based.
- PowerPoint driven.
- Training in “silos”. By this I mean that training people in their own teams, in their own services, within their own professional domains, was the sole focus of the listen and learning.
- Poor evaluation of impact.

New Ways

- On the job, learning and coaching; so up close and personal between the manager and the employee. More talking to individual about the job, more exploring how the employee can do the job more effectively, helping them to think about how they can manage themselves.
- More social and collaborative forms of learning; we have done a lot in the Council with Action Learning Sets, involving small groups of managers coming together, looking at an issue that managers have in common, and helping each-other to figure out what to do. These focus on issues that are perhaps intractable, that are difficult to solve, and are not straight forward to deal with.
- More online collaboration; with people talking with each other about issues they have at work.

IT – Are you keeping a record? In the old days of classroom based training, it was easier to keep a record of how much time was being spent on training, or development. How do you record on-the-job learning? How do you keep a record of how much time is actually being devoted out of an employee’s working week to train?

PH With great difficulty, if I’m absolutely honest. One of the issues with continuing professional development is that, because so much qualifies, people are able to use more informal methods as justification for completing their professional requirements. In my experience, the amount of time that managers are able to commit personally, and on behalf of their staff, to any kind of training, or learning and development, has decreased significantly in the past few years. One of the issues that we face is helping managers to clear the time to attend development programmes. We have often shortened programmes, and concentrate them in shorter bursts. Trying to get managers to come along to a two or a three day leadership course, where they are out of the office, does not work. It’s virtually impossible. We have to be smart in what we think they would be able to do. That’s why we put more learning materials online, for them to consider before we invite them to attend a session. So when they come to the programme, it’s heavy-duty, experiential learning. This is about using a more adult education model.

There’s a greater business focus; we’re clearer that the learning has to relate to what the Council is about. It used to be you could do just about anything, and whilst there is a place for some of that, in terms of people’s personal development, and

development in the job, we have to be sure we're covering the business end of things from a learning and development perspective.

It's increasingly technology driven; as you're all well aware. So, you're looking at online, computers, use of video and so on. It follows lifelong and adult learning approaches; focusing on experiential learning. We've also linked learning more to thinking about how the Council is developing, what the future needs are going to be, what we need to prepare ourselves for in terms of the future. Richard Tucker, when he comes to talk to you about ALDO, will touch on some of these things, and how we are trying to incorporate the use of technology appropriately into the overall learning experience. But you can't put everything online. When additional technology became available, some people were like "oh great, we don't have to do class-room training anymore, it will all be online," but people don't use it unless there is a context and a need, and a need that is fairly immediate. So, personally, I use the online material specifically when there is an issue that needs to be addressed. That's the most appropriate time I think.

HOW IS LEARNING IDENTIFIED

Corporate Learning

PH Firstly, the corporate approach. The Chief Executive's management team quite often identify areas for development from their discussions, regarding the operations of the Council. Council priorities also dictate, to some degree, what the learning will be. There will be particular business needs, or initiatives that the Council want to undertake which will require people to learn and develop competences. The development of a culture, within Aberdeenshire, of enabling staff is quite important. I don't know if you've heard Colin talk about "just do it"? He wants people not to prevaricate and push problems up the managerial chain all the time, but to take more responsibility, feel more empowered, take decisions and live with their decisions. That is quite a difficult thing to change, and it takes quite a long time, but we are certainly trying to work to develop that kind of supportive operational culture. This approach needs people to think about particular leadership behaviours that we want to support, and in any organisational development we may want to undertake. This is at corporate level, and will also apply at service level.

IT – Are you not exposing the employees to a risk by asking them to make a decision that they may wish to refer to their line manager?

PH It's not about saying to employees that you have to take these decisions without conferring with a manager; it's within the domain of your job, are you able to make decisions without reference upwards for every single decision you need to make. What managers talk about is the challenge of employees, and sometimes even very competent middle managers, coming to them, looking for a decision to be made on something, when, in fact, the direction of the service and the Council is clear and the officer could make their own decision. If they're not sure, that's a different matter. Part of it is about helping staff develop their own confidence to make decisions.

IT - Why were they appointed in the first place, if they can't make decisions?

PH Well, that's a good question, but you can't always tell from the outset if someone is going to be good at decision making.

RT –In a previous employment, a matrix system, which was called “GO”, operated. “Go and do it, do it and let your line management know you’ve done it”. There were other areas of the job, where you had to get approval first – “above your pay grade.” Does Aberdeenshire Council they have anything similar?

PH No. We clarify in the job description, or the job profile, what the parameters are. It is really important that the recruitment and induction process emphasise and discuss this.

Service Learning Development.

PH When you meet with the Services representatives, they can tell you how they identify the learning needs, based on what they have to deliver. Some comes from the outside, like Scottish Government, into services; for example, schools have quite a bit of those initiatives. Teams, obviously, at a more local level, would be looking at team working practices, and maybe common needs arising across a team, especially when teams are focusing on particular activities, some may decide they need a particular kind of intervention or training. The same applies for teams as the same as the services, to some degree, in terms of what they're look at, and what the organisation and the service is trying to achieve.

Individual learning and development

PH Clearly induction is part of this, as is the EAR process, looking at the job requirements, any short falls, and required competencies. Am I fully able to keep my role? Is there anything to do with “Career” regulatory requirements?

THE IMPACT AND USE OF TECHNOLOGY

PH Again, Richard Tucker will go over this in more detail at a later session, but the establishment of ALDO (Aberdeenshire Learning and Development Online) has been quite critical for us. It allows for blended learning; where people do some homework via an online course, before workshop sessions. We strongly believe in this new learning model, especially if you need to learn how to carry out a courageous or difficult conversation, negotiate or develop coaching skills. There's no point in just reading about it; that won't take you anywhere, you need to practice the skills, get feedback, and then go out and do it. All of these areas are really important in today's working world, because we've moved away from a structure of only command and control. This approach has its place, telling people what to do and what the boundaries are, but the modern employee has a mind of their own. We have to engage with that mind, if we want to get the work done.

There are drawbacks to using technology, it's not the be-all, it's not the answer for everything, and you must also consider that all areas do not have the same access to the technology. Where it can be used, however, we are increasing holding electronic meetings. You have heard the term “webinar” - for example, we could be doing this presentation in this room, and we could have other colleagues at home on their laptops, or other geographically remote locations, logging into this meeting. The process is related to video conferencing, but it is more stable and reliable.

ELECTED MEMBER DEVELOPMENT

Induction

PH One of the challenges for the councillors' induction in 2012 was that for elected members, there is an awful lot of information to know right at the very beginning. We recognise this, but it's almost impossible to pick it all up right at the start, so there was a focus on the various things that you need to be told immediately, at least from a risk perspective, for the Council's point of view. We also need to be capturing the different requirements of newly elected Councillors, if there are any new Councillors, compared to returning members.

IT – I think there was too much induction at the most recent elections because, people were turning off, they had had enough.

GO – I think it was better compared to how things were when I got elected, I wish I'd had that. I remember my first constituent visit when I was unsure how best to proceed. The induction pack that new Councillors now get when they are first elected, that has all the names of contacts was the one, useful thing we didn't get. When I was elected in 2007, we got nothing. The induction days were about two weeks in, and I'd been to an area committee before I'd actually had an induction.

IT – I would have been backing experiential learning and development by going to the Director, and saying "could you tell me how to respond to this please? Not all information will be in the pack, because the policies could change, and you don't know why the reasons why the policy was put together.

GO – I think the folder of information we got in 2012, with contacts, notes and details, was very good.

IT – Were there negative comments from members about the induction this time?

PH There were comments about the quantity, that it was an awful lot of stuff to take in. So, we will take that on board for next time. I think there are all kinds of different things we could do. One of the things we did look at was whether we could somehow arrange a group of people who had experience of being a Councillor to "buddy up" with new members, to help them with any questions that they' have. Next time we will to try and cover that whole range of different things that people need to know in a different way, to prioritise learning.

JL –I found it quite overwhelming, but I probably only took in about 23%. I still have the stuff, but it was actually, on the job that I learned most. Most elected members have a modicum for self-reliance, and will try to find something out. Whenever I was confronted with things I didn't know enough about, I just asked whichever councillor I saw first for help, even if I didn't know them. They were always happy to help and give their opinion on things. I found that quite positive.

LS On Elected Member Development, there is a session on 25 September, 2013, and I will be back with Ann Williamson, who is our lead officer, for elected member

development. In summary there is; (a) Continuing professional development; and (b) a 360 feedback process that we have bought into with the Improvement Service, which enables Councillors to get feedback from a range of different people about their performance against national standards for elected members. It is not available yet, but it will be quite soon. We are just testing the system at the moment. We're looking at Chairing Skills; and considering, with senior leaders, how that might be best delivered. Another area of elected member training relates to the duty to participate in Chief Officer Appraisals, where committee chairs are involved.

KF – Do elected members get appraisals?

GO I think the answer is “yes, once every five years”.

LS The 360 feedback exercise; to some degree, would form part of what an appraisal might include – so if it's asking constituents, or committee officers, or other people that you've worked with in an area, how they see you performing in terms of various categories and standards. Depending on how you would want to use that information, we can see it as part of an appraisal process.

BUDGETS

PH The total revenue spend, corporately, on the courses budget line, is slightly in excess of £2million. I'm sure the accountants can provide you with the detail when they come and talk to you.

With the Corporate Learning and Development Budget I manage, there's an allocation of £47,000 which we use to help corporate programmes, where we require resources externally, and external facilities for trainers, where we don't have the expertise in-house. We don't outsource externally to any great extent these days, although we are open to bringing external people in. We recognise the skills we have in our own teams and services that we can use. ALDO for example costs approximately £7,000 and is funded out of that £47,000, which is actually very cheap.

The other area of expenditure is for the two Corporate Learning & Development Teams. Also, within services there are personnel who have, as a significant part of their job, responsibility for learning and development within that service. For example, there's a Quality Improvement Officer, Sheila Marr, in Education, Learning and Leisure, and Fiona Robertson undertakes that role for Housing and Social Work. Other personnel in Infrastructure Services I think have part of their time at least, allocated to in a learning and development function.

I think it is important to recognise that there is also a cost in manager and supervisor training time with employees. All these conversations we're talking about might be about the job, people sometimes coaching within their own work setting, so that takes time, and that costs money. It's very difficult to quantify this cost. Plus, there's the cost of employee training time. This is the time you take people out of their active job pursuit, into the training context, whether you're allowing them time off to study, allowing them to come to a formal training course, or complete a vocational qualification. Again, there are quite hefty additional costs involved.

IT – I note that there are formal budgets, which can be quantified, but that doesn't describe really the real situation of the cost of supporting training within Aberdeenshire Council. If, for example, Audit Scotland were to ask you how much are you actually spending on training, are we not in a position to tell them?

PH The sole areas of absolute clarity and definition are the figures of £2m, and £47k, so we can give them those figures, but once you get into other areas it becomes pretty difficult. For some particular kinds of training, it might be possible to quantify costs, so for example, someone doing a VQ in Care at Level 3, you might notionally allocate is an allowance of two hours a week to complete a portfolio. From this basis, you could take their hourly rate and multiply that up.

IT – Would employee training time be on a service budget, or do you keep track of it in HR? Is it a formal budget line, or just part of the overall service spend? How we are able to track how much is being spent by each service?

PH It would be one of those discretionary things on which people spend varying amounts of time. If you were going to try to calculate and track the real cost, you could estimate a notional percentage of people, in terms of their time on training and do a desk top exercise, using case studies, and take examples from that. I think it would be very difficult, it would take so much work, and so it wouldn't be worth it.

IT – Surely all a manager needs to do is record when a member of staff is allowed to go on a course.

PH Sounds like a good theory, but the practical issue would be about getting them to do it on a consistent basis, so you get an accurate picture. It's not being done consistently at the moment. Some people, teams and functions already have pretty good records locally. As it's currently discretionary, not something you absolutely have to do, and with managers often focused on delivery and getting the job done, it often takes second place.

THE CORPORATE LEARNING AND DEVELOPMENT TEAMS

Employee Development Team

PH We have 14.8 full time members of staff, and they focus on SVQs, relating to care management, roads and highways, landscape and quarries. These are banner headlines, and they don't give a broad enough picture of the work that these teams do in terms of the scale of the assessment, and the number of people who are actually in the systems. Quite high levels of, in particular, Care VQs go through the system in any one year. We manage our own in-house SVQ centre, which means we were able to verify qualifications through our own auspices. This team also contributes to mandatory driver training, and areas such as manual handling and first aid, which is now being more formally assessed. The team inputs into other areas such as modern apprentices, which are becoming more common within the Council. They also support learning and development around subjects such as business administration for those in administrative posts etc. There is on-going work with Housing and Social Work, designing and delivering training that is relevant to the broad range of staff employed, particularly in the care sector and in social work. In relation to ICT training, the requirements have shifted a fair bit in recent years. It

used to be we provided basic training for people using computers, but this is less and less the case, as people come with these basic skills already. So more and more, we need to be moving to the on-line availability of resources. We have also developed particular programmes for new ways of working. The European Computer Driving Licence, (ECDL), which we have been supporting over a number of years, ensures people are up to certain standard of proficiency. We develop programmes to support Customer Services, our online learning and deliver of many other forms of training.

Leadership and Management Team

PH This is a much smaller team, their focus is on helping leaders and managers develop. There are 4.6 full time employees there, and they cover induction, management development, leadership development, people management skills, internal consultancy, team development, facilitation of meetings, coaching and mentoring development, joint working with Community Planning Partners, and advising services about commissioning options. It's planned to send a full copy of the people management guide to Councillors in due course. Services would look at the model of a handbook, the "how to" guide in advance, and then they come and do a work shop. The headings or content have been developed as a consequence of managers saying "we need help too". This might focus on areas such as communication skills, having a courageous or difficult conversation.

IT – What is a courageous conversation?

PH It's one where someone is a bit anxious about saying to someone else, for example, "You have body odour". It may be something that you have been putting it off for months, relating to an on-going issue. It takes courage for the manager to sit down with a colleague and broach a difficult matter. These things are best developed in behavioural workshops; it's about helping people overcome short comings in their skills, and raising their courage. Mike Healey, the Leadership and Management Team Leader, will come and talk to you about this, and what his team is doing, if you like.

JOINT WORKING WITH PARTNER AGENCIES

PH This is an important part of the bigger picture that is evolving of learning and development within Aberdeenshire Council. It has grown quite a lot in the last few years. Partner agencies include Aberdeen City Council, NHS Grampian, Police Scotland, Fire and Rescue, and the third sector. So there is a small co-ordinating group to consider the benefits and strengths of shared learning and development.

Senior Leader Programme: Here the approach is on "Collaborating for Outcomes". This is focused on government strategic outcomes, and looking at how best to work across the public sector to help apply those.

Middle Managers Programme: Has just been launched, aimed at people at team leader level to help with their development, which could lead towards qualification in due course.

Supervisor Development: This is very much, first line management level, developing knowledge and skills as a supervisor.

Mentoring scheme: People apply and we find mentors for them across the sector.

Critical Skills for Critical Times: the idea that there are a lot of issues around in the public sector at the moment, and some new skills, such as coaching for example, are required to meet the challenges.

Job Shadowing Scheme: An agreement to go and shadow someone from another agency.

Facilitation Bank: is an area under current development, e.g. in relation to health and social care integration.

EVALUATION

Traditional Methods of Evaluation – these were things like “happy sheets”; follow up; section evaluations. It’s generally acknowledged as difficult to find the impact the learning and development, but there are a number of options, which would include the individual self-assessing themselves and having a conversation with their manager. It’s critical, in an ideal world, that a manager discusses with a person on their return from a learning experience what the impact is likely to be. This should then be recorded and revisited over time to check application of the learning. There might also be formal assessment methods in some programmes such as VQ programme, where staff are formally assessed against all the standards. In a lot of cases, there are challenges in evidencing the impact of learning and development.

We want to find out if our programmes are working? Are employees getting something from them they can demonstrably apply in the work place? Or should we be doing something different?

What we tend to do is follow up any programme with questions around what was the most significant part of the learning programme for the member of staff e.g. “What could you do now, that you couldn’t do before? Behaviourally, what can you do now, so that you can have a conversation, about whatever? What have you done with techniques received, or learned, during the course workshops, since attending? So, what has been the follow up? “It’s not just enough to go to a learning event, you have to follow up. We use those questions for feedback on the effectiveness of attending. Lots of services will have different ways to check the impact on learning and development.

IT – When it comes to evaluation, is there a corporately set minimum level of management which is empowered to approve training, or is that impossible, based on cost?

PH I don’t know about this in detail to be honest, but I think the services self-set their approvals for levels of costs or availability. It could be based on budget availability. If I’m the first line manager, for example, in a care home, I can authorise the training I think my team needs, but if there is a budget that I need, I might have to be in a pool to bid for that money with local managers.

Services themselves are best to go to for training budgets. Infrastructure Services have a panel that they use to make decisions, particularly the larger amounts of expenditure. But, in general terms, if someone wanted to apply for a corporate programme, they would just apply through the on-line training booking system. We used to ask line managers to approve people for courses in advance, and then the person could go in and book themselves on a course. But that was ridiculous,

putting an extra step in the system, so now anyone can book a course directly. An email of the request will automatically go through to the Line Manger, as well as the individual, so that there if there were an issue, if someone were doing a course that was not relevant to their grade, or the level of expertise that they require, then the manager can talk to them about that. We wanted to make it as simple as possible for people.

IT – Do you find people put in for courses that might not be appropriate to their jobs?

PH No, that's why we removed the approval system. That was precisely my argument; people generally do not apply for things that are not relevant to them. It is good for the manager to know that someone has applied for a programme, so that they can support them, as well as maybe vet whether it's appropriate or not.

JL –How does that fit in with you said earlier looking to support future development, where staff may wish to go up the ladder, improve their skills to future employability at a higher level? That, presumably, would have to be subject to prior negotiation with line managers?

PH With some things, you would need to apply to the management development scheme, or, at the very least, have a discussion with your line manager about starting on a particular programme. In my earlier reference, I was thinking more about the "one off" skills based course, such as negotiation. If you're a first line manager, and you apply for that, it would be considered appropriate for your grade, experience. So, your line manager will get the email and think "that's great, you've applied for that", and you should have a chat about some of the things that you might want to learn from that course. However, if it's something like the "Future Leaders" programme that we're developing at the moment, entry will be by application. There will be a process of vetting who applies, and selection criteria established to inform decisions about who's going to get into the programme. What will happen is that a line manager will make statement in support of an applicant, or otherwise, but it will still go into the application process. The line manager will not be the barrier or decision-maker, it will be further up than that. We want the right people on the programme, and the line manager will have a view about that.

IT – Are you speaking about internally advertised courses? Suppose someone wanted to apply for a course, that's not been organised or offered by the Council, is this person, or their manager allowed to apply directly, and how does the line manager become aware of that?

PH I'm talking about internally, in-house provided courses. If someone wanted to go on something external, it would be reasonable to expect that they would talk to their line manager about that. It's unlikely to be free anyway. You would have to think about where the cost has come from, unless the officer wanted to pay for it themselves.

GO – It does seem quite bizarre that we spent £2million, and your department has no control on how that money is spent. For all we know, we could be wasting £2million on courses that are irrelevant to us. There doesn't appear to

be any direction, just a case of “that just happens”. I think your £47K allocation (with £7K of that going to ALDO), is probably money well-spent, but how do we guarantee that the rest of the money is allocated for training which is being done in the correct manner?

PH From my perspective, I don't want control over all the money. I think it's important that the services have control over their own training budget. They know best what they need. While you're carrying out this investigation, you want to look at how effectively that is happening. That will be interesting for us in terms of “What can we do as learning and development service to help services a bit more, with how they're making decisions about spending corporate money?”

IT –Should the Infrastructure Services way of doing things, where everything goes to a training panel, allowing it to be tracked and quantified, be rolled out to those departments which are not using that system?

PH It may be that other services have similar processes, using different training panels. I know that Housing and Social Work are pretty aware of what their budgets are, and they have a group of people scanning their budget, so that's part of the investigation. In principal, a training panel would be feasible for each service.

JL –How involved does Learning and Development become in allocating, or deciding priorities, of these training needs? I would have thought that Learning and Development would have an input, some element of control at least.

LS – I suppose it's more of an element of support than control. There are a couple of examples, when SCCC registration came out, we were heavily involved with colleagues in Housing and Social Work and Education to make sure that we had systems and processes in place to make sure the workforce met the requirements for registration. As Paul said, at the moment, we do have budgets in different services; in some areas, such as Education, there is a significant amount of money, because they have more than half of the employees of the Council, but they also have school specific budgets. While we're not really policemen on training and development budgets, we do want to make sure they get value for money. If we find out, for example, some services were going out and purchasing external health and safety training, where we have a health and safety training team, that sit in the Council that can deliver training, we'd recommend to the service that the Health and Safety manager come in, and discuss future needs and assured options. It's been known for us to go back, in particular cases, to say, don't do that, that shouldn't be happening. Sometimes, on the value for money side, with that training line for conferences as well as well as courses and you can see fliers coming in across the council promoting a specific provider, event or course, it is appropriate to intervene. If there is something on, say performance management in Edinburgh, you don't want 50 people from various parts of Aberdeenshire Council going, it would be cheaper to bring one person up here. And that's where I think there's scope there for more co-ordination, and we're trying to do that when we can.

IT – I can see why you want the budgets delegated to service departments on the basis that they know their requirements best of all, but would it be possible

for Learning and Development to have an oversight of every training course attended or proposed to be attended? Is it too onerous to ask services to alert you to the range of courses, providers and costs for externally sourced learning and development? Do you have the capacity to undertake that co-ordinating role?

PH At the moment, we're not staffed up enough to do that.

LS There are complications in even tracking the expenditure, with different recording and reporting processes, some of which sits with the accountants involved in checking budget coding for each of the budget lines. I think there could be improvements to making sure we get value for money, and that is good practice is shared across the Council and even its community partners. There should be further development of shared commissioning to make sure.

IT –If it were a management course, where the elements covered were more or less the same across several services, and the need for such a course were reported to you, would you be able to organise a Council-wide provision?

PH You could well argue for a referral to Learning and Development for programmes that are all of a particular nature, or of a particular cost. For example, recently, a head of service wanted to undertake a particular programme, and it was approaching the procurement levels, where they would need, in terms of Financial Regulations, to go externally for quotes. We were involved in helping them to think about how that might be done in other ways. For example, we could advise services to return to the company to renegotiate costs, or ask for tailored components only, or direct them to alternative providers. We're more aware of the training market, so there could be some future potential for us to provide a more active support to services in sourcing external provision.

It is hard to tell if we would require a lot more resources to accomplish this; there are lots of entries under the budget lines. Services don't ask for our support in this type of thing as a matter of course at the moment, because they don't have to. If the Council were to take a different view, and decide to they wanted us to become more actively involved, we would find a process to enable that to happen. We would, however, have to look at what resources implications would be; potentially we could be looking at saving money anyway, so it could be a "spent to save" decision.

RT – Presumably, employees of Aberdeenshire Council have records of their continuous professional development. How is this stored?

PH At the moment, some of this is in EMIS (Employee Management Information System), but this is a pretty basic system, but other than that we can't produce that information across all staff. I would say there are gaps in that at the moment, but we do know that people have to keep their own CPD record for professional purposes.

RT –If there is this electronic record, which has a fair whack of the courses, diligent resources, and has been kept up to date, is there any means of interrogation to make a sense of the scope of training and development? For example, could we find out how many people did courses in negotiation skills?

PH Yes, in terms of the scope and volume, and subject area. I'm not sure how much information can be pulled off the system as it stands. We can have a look at that, certainly, and try to get as much information as we possibly could for you.

RT – It is just to get an idea from that, how many suppliers we use for outside training in particular areas of opportunity for consolidation.

PH For our training records, we have those we can pull off the up to date data from EMIS. It might be more difficult to access the same information consistently across the services, but I don't know.

LS I know Committee is minded to hear from Alex Stephen, Corporate Finance Manager. He should be able to provide information directly from the ledger of the £2M on external provision. EMIS, as you recall, is in the process of being replaced. The new system will have a lot more functionality, which will improve the recording of training information and its interrogation. It doesn't have a name yet, but will be introduced next year. The actual supplier is called ITrent, and we are looking for a more user friendly term so we haven't got that yet.

We have already committed to come back to this committee to give more information about the new system, but as they're still building parts of it, we have no timescale for when it might be possible to have a look at it. It's intended that there be a lot of employee self-service, so if someone changes their address, they can do it themselves. They won't, however, be able to change salary allocations! In addition, more management reports will be possible, so again, that will alert managers to issues such as if there is a new employee who hasn't been on induction. The system is a lot more user friendly from that side, and we will get a lot more management information on travel and subsistence, mileage claims, as well as leave, sickness and timekeeping. We're also looking at the potential generation of electronic payslips. A lot of the payroll systems are manual at the moment, without the controls of the electronic one. It's not going to solve everything, but it will help with a lot more details, and I'm happy to come back to you once we have more information.

P&R approved the purchase of the system, and I think was over £1m, but I can get you the report, because it was approved about a year ago. It was a spend to save project because of projected benefit realisation over the five years of the project.

There being no further questions, the Chair thanked Laura and Paul and the meeting closed.

11 SEPTEMBER, 2013
ALDO (ABERDEENSHIRE LEARNING AND DEVELOPMENT ONLINE)
PRESENTATION

Present: Councillors G Owen (Chair), R Thomson, (Vice Chair), S Duncan, J Ingram, C Shand and I Tait.

Apologies: Cllrs D Aitchison, N Cullinane, K Farquhar J Latham, A Ross and M Watt.

Officers: Richard Tucker, (Dr T) (Team Leader, Employee Development) and Sharon Armet, (Employee Development Officer).

(Please note that for the purposes of identifying speakers, Cllr Thomson is RT as standard and Richard Tucker is Dr T)

GO Welcome to the meeting, Dr Tucker and Ms Armet. The purpose this afternoon is to see in action the new ALDO system and learn about its creation.

Dr T I'd like to explain to you the principles behind ALDO, and the approach taken by Learning and Development as a whole. Reflects changed approach – well researched and infrequently implemented – A'shire ahead of the game, compared to other public sector and private sector comparators.

Traditional approach = face to face – had to be as predated technology (exceptions – Open University approach – send out packs for self-study.) Still appropriate in some cases, so still used.

Face to face = determined by teacher/ tutor – who decided what you need to learn – you have little say. Fine for compliance training, or when related to qualification but not appropriate to all activities.

Traditional workshop session – i.e. a course – you might attend a course to learn about Word – you learn (a) (b) (c) – problem – you have to wait for others if their learning is slower than yours- or get left behind if you're slower – leads to disengagement.

Also hard to schedule class time – needs to be done on a date/ time. Issue – learn/ know on the day – but not apply for months – forget. This is just in case training.

ALDO lets us address these issues – learner can choose what to get – we provide accessible resources, not a “course”, from which you can pick the bits relevant to yourself – what you want/ need at that particular time. Internet based – can access any time/ any machine (not just Council) – suits shift workers etc. This is just in time training.

Reiterate- do have still traditional courses =learning from “a-z” – e.g. in compliance – but ALDO offers a different approach in the design and delivery of learning.

System in place since June 2012- has over 90 courses available at present – more under development. Courses are created to be learner or team led – we offer the creators support – the content expertise comes from the specialists – we put into online format –collaborative process.

All staff (and Cllrs) have an account – based on payroll number – with own password to be set after first access.

Search facility – or view the range of courses available – list of topics – initially those people have said they wanted. Can be added to at any time when service need/ learning gap identified.

Resources – variety – can be written instructions; links to online information / external resources? Can include video/ audio clips.

IT are staff likely to go via ALDO e.g. for Word help – when can Google directly?

Dr T we've often done that to source links/ resources – but sometimes people can't use Google effectively enough, or want the filtered/ Aberdeenshire specific guidance. The Help system in word itself is very complicated too – I was previously a further education teacher – and students found it “too geeky”. If there's a resource out there which can be lifted (i.e. no copyright issues), we lift; if there's nothing close to what we need, we make it. Lifts may not be perfect, but we will use if good enough/ close enough. In the same way we look for internal resources/ knowledge for customised fit.

Jl Do you filter out inappropriate? Shortens time to find info too? Agree re Help – not very helpful on occasions!

Dr T Yes- agree. Help doesn't always help. Filtering directs more closely/ reduces volume of info to wade through – for example, Google “Word” – leads to Microsoft and hundreds of things – we only need the basic “how to”s. It's often helpful to be “talked through” a how to – or shown in video link/ screen captures what buttons to press. In ALDO, there's always the option to address detailed questions on – there are contact details for each course.

SA As content for the courses is drawn from people's experience of what they want to learn/ know – have developed FAQs (Frequently Asked Questions) from previous – or offer email contact for support. We've reused short snippets from real emails to populate FAQs. Also added in experts on topics where common fields linked.

Dr T Word is a very expansive package – but most users only ever use between 2-5% of its functionality. This is another reason to go for a “pick and choose” approach.

Course on Minute taking – what is a Minute – allow interaction with a tutor – set task “what do you think a Minute is” – send answer to Tutor in email – not necessarily immediate reply – but opens an interaction.

Introduces a blended learning approach – face 2 face and on-line- may culminate in a practice workshop – i.e. experiential learning – putting into practice what's already learnt- more valuable use of people's time. Always a comment box for evaluation and feedback - open to all course users to see and tutor can respond if required. Allows on-going reassessment of course content too.

IT If accessed via the internet, does system record who's on, when and how often?

Dr T It can do – but except for compliance/ data protection etc. courses – we don't collect at present. I can look at usage – and could ID who as linked to council payroll number. Also, currently partner agencies may use it – NHS Grampian and Abdn City – there are about 150/170 non- Council users.

RT Commercial arrangement – or is it open source?

Dr T Open source at present – if scale increased, might have to consider. If provision cost was £000s, would charge – but can absorb in current licence.

IT Template based system or developed elsewhere?

Dr T 3rd party – hosted on their server – we pay license fee for use. Stays at about £1 per user per year. Approx. 4,700 active users at present (i.e. have used in last year)

IT If not use, does user ID become disabled or auto renew?

RT The cost is based on active accounts – redundant/ inactive accounts don't cost us – we remove them.

Active use patterns (average) to the end of August 2013 – 120 per day Monday – Friday, 20 on Saturdays; 27 Sundays. Implies access by shift pattern workers/ flexible workers.

IT Does the system show completed courses or just visits?

Dr T That's not an easy question to answer because so many of our courses don't get "completed". If a user visits a course and gets what they need from just a part of it then they have indeed completed what they need to do, but it is hard to track that reliably. Courses which do get completed as a whole often have a design flaw in that they force the user to do A then B then C- exactly what we don't want when it's not appropriate. That approach makes it easy to chart progress but can be horrible for users to access – a "death by clicking" approach to learning. We are trying to establish a forum for discussion/ community accessible feedback, or use survey monkey technology – i.e. something deliberately different to evaluate learning.

IT Evaluation does take place?

Dr T Not in all courses – for example, the "Business Documents" – it's a go do / go away – hard to get evaluation. We do email people on courses to get feedback- but it's difficult to engage after the event – especially if people have found out what needed and no further interest.

CS Is there a general comments column?

Dr T Yes- and comments left by users will get a response – again, visible to all – may help to inform other people beyond the original poster.

CS Looking at a course, telling me I'm a guest – and "enrol for full access?" How?

Dr T based on Moodle, an education based system for enrolment. If you enrol in the course, it will track you. If you don't enrol, you can see and take part in about 95% of the material – without needing to complete/ evaluate.

PSAs course – supporting learning in Aberdeenshire- content developed by Educational Psychologist – with substantial chunks of training. Video/ topics – also “chat room” feature (NB Not moderated), as well as a discussion forum where questions or comments might be left.

GO Who replies to any messages left? Is there someone always present?

Dr T Depends on who’s online at the same time –there aren’t always service representatives present.

GO So someone not in the Education Service could be online and answer – and get it wrong? Or what if key issues are raised, and no-one is there to answer?

Dr T There might be someone from ELL there – but if there’s no one on-line, there’s not a failsafe method to ensure all matters are addressed. Learners would have to contact the service support- or leave a comment in general comments. But, the service designers may determine to have online support at particular times – for example on an in-service training day, where there would be an expectation of lots of people accessing the course.

GO Can people who created the courses dip in and out of the chat?

Dr T That would be up to them to decide.

IT What are the differences between the chat room and a discussion forum?

SA Every Wednesday the Chat Room will be populated for a course. Discussion forum is better for a specific course – i.e. you can set up email contact with a named person who will respond to any queries and can be alerted to specific issues. Any comments/ exchanges remain on the forum even when you have left it, so that it is visible to any subsequent visitors. The Chat Room, like Instant Messaging (IM), all discussion disappears when the window is closed.

IT Is access to the chat room open?

Dr T If you’re not enrolled on the course, no. But only two courses are password protected to restrict access. There’s no intention to restrict people from interest in any of the learning. If I look at who’s accessing which resources, there’s a great variety – people looking at courses which will develop them and widen future career opportunities, so you might get a waste operative learning about powerpoint.

RT Is there any restriction to the numbers that can use ALDO at any one time?

Dr T The only restriction is bandwidth to the server.

IT So, if I feel that there’s a gap in my knowledge and go looking for a course, are there any areas where I’d not be able to learn via ALDO, but be delivered face to face with a tutor?

Dr T That would apply to most of the practical areas – e.g. grave digging, or manual handling – although there would still be some preparatory work to be completed in advance.

IT Do you have figures on which of the 90 courses are accessed and the number of times they are accessed?

Dr T In ball-park figures, of the approximate 90 courses, there have been 12,000 visits to courses – note that this is not number of visitors – some people may make repeated visits to complete their learning.

IT How does the cost compare with traditional learning methods?

Dr T We've not done that calculation, but if you were to calculate the number of courses, at a capacity of 20 per event, that would be needed to meet some of the 12,000 visits, you can see at once that there will have been substantial savings in that alone – without thinking about reduced travel to time. But cost was not a driver for the creation of ALDO – this is a better way of learning.

RT In my previous employment working with a MP all training was outsourced and we travelled to London – it wasn't very time effective. I can see that online training is very supporting of time resources and reduces the need to gather in one location to be taught. There are obviously potential savings to the Council on this side also?

Dr T It's not been formally assessed, but I think it would be a huge amount. Savings would also be found in the reduced hours which reduce, in turn, the need to backfill specific posts to allow attendance.

IT You've given us the annual cost of £1 per user – what are the overall costs of ALDO?

Dr T The cost is £7000 per annum for the system, for use by up to 10,000 active accounts. If we were to need more accounts, it would rise to £10,000. There are the only concrete costs. There is staffing support centrally through learning and development, and by specific staff in services – but these are already established posts, so there are no additional costs.

RT It is £1 per user no matter how often it's used by them?

Dr T Yes.

IT And the more people who use it, up to the licence level, the more cost effective it will be?

Dr T Yes.

RT How is it decided what material to put onto ALDO, which courses?

Dr T It's based on need, our experience of high demand areas, requests from learners, and in response to specific service or legislative requirements. Sometimes we go to the services to see if we can assist them, sometimes they come to us with a specific need. In that way we're sure we are providing what they need and not second guessing what they might need.

RT Is there more information, rather than practical stuff, online?

SA There are practical elements – for example, there may be a DVD/video clip to watch on which questions were subsequently asked and submitted. In some cases, the editing trainers have uploaded mock papers into ALDO, but for matters such as lifting and handling, although you can watch some aspects, you'd still need to be able to do it –so practice is essential.

Dr T There are also practical elements in some of the information “heavy” courses- such as the Equalities and Diversity – which are used to demonstrate the application of the learning. In this case, teams are encouraged to discuss the protected characteristics and apply this to their local context.

RT If several managers came with different course needs, but with a core of commonality, could you develop a shared resource to cover the common ground?

Dr T At present, if that happened, it would be accidental. We don't necessarily get an overview across all course content as we rely on the service specialists to determine what is specifically needed for their service.

RT If you are concerned, would you overrule content decisions?

Dr T It's never happened – but there's no systemic way to do it this.

CS How do you monitor if people are applying for inappropriate courses?

Dr T We don't – but people tend not to go and browse, unless there's a specific wish or reason to learn. Sometimes visits are straight in and straight out.

SA You can un-enrol people from courses. The view doesn't have a “guest “bar – some enrol to browse. If it was inappropriate, remedial action could be taken.

RT It's surely good to see people “rummaging about” looking at the information available?

IT And it costs nothing extra for them to do so.

Jl How can this be used as a tool for forward planning- for example to respond to changes in processes and legislation? If these are specialist areas, how would you resource them?

Dr T Yes, we use it for future planning for these situations, but I should stress this is not the only way to do everything. For specialist areas, with the services coming to us for assistance, we'd discuss how best to progress. On occasion, that might

mean “train a trainer” for direct learning. If it’s too specialist, ALDO might not be the approach of choice.

IT Did you look at alternatives to ALDO before it was purchased?

Dr T Yes- there was consideration of how best to go ahead, acknowledging that there were so many resources and expertise already within the council which could be used. Why outsource training if often we can do it ourselves, better, more appropriately, and cheaper?

GO Would it be helpful if services had to come to you before sourcing training?

Dr T Not necessarily, although it could be better co-ordinated. Some services already have their own, in-service, “clearing house” for such approvals.

GO Is there a role for your team to give advice on which choice of external provider? Or to advise that learning could be accessed from in-house resources before going externally?

Dr T That might be possible – we already have some discussions about “do we have” versus “could we go to...?”

IT Would such a role as a “gate keeper” also allow you to create a register of emergent learning need patterns?

Dr T The role of gate keeper in absolute would be very difficult to undertake with any validity. There’s such a wide range of needs that the choice of exactly which and how and who is far better devolved to the specific services.

RT Would the role be useful to allow you to determine whether there are gaps in ALDO?

Dr T We already have regular discussions with services about what’s on there, especially in those services which have training panels – I can’t see that a gate keep role would add to this.

IT Who sends training information to staff/ emails interested parties?

Dr T it comes in at all levels, depending on the course/ learning. For Leadership and Management, Mike Healy would issue the information, but we’re not trying to sell ourselves overmuch. There are enough calls on our time to support at present, we have a very full order book. There is no formal system of prioritisation, but we are aware of deadlines/ requirements. Courses don’t necessarily take a long time to produce. Any delay may come from the subject experts themselves – the package itself can be quick.

IT If training requests come directly from services, how can you determine priorities across conflicting needs – could it be better coordinated?

Dr T There could be improvements in coordination – it's not well coordinated across all services/ systems.

GO Does information on course completion for the PSA group come back to the service?

Dr T Yes- the editing trainer gets that information.

CS Do any other local authorities have a similar system?

Dr T Some may have similar – not many have the same. I'm not aware of any one else adopting this approach – it tends more to be a "tick box" approach to watching a video clip, for example.

CS Could the scheme be extended to provide councillor specific training? For example, the Licensing Board needs members to have completed training before they can determine applications?

Dr T We could do – if asked.

CS Licensing training costs about £180 per candidate – for 24 Councillors every five years, more with changes of personnel – others (police, licence holders etc.) need this training too – we could provide it for them at a cost?

IT Licensing training needs to be accredited.

SA That shouldn't be a barrier in itself – we're accredited for several other pieces of training already.

GO This is a point which could be made to services- if courses cost about £180 per head – and could be provided via ALDO, this would surely reduce demand on the £2M service budget?

IT Would it be possible to extend the "selling" of courses to other local authorities? If so, what level of income could be possible?

Dr T It's impossible to answer. There would be a cost to us in doing this, if it needed to current support arrangements to expand. At present, all you see in ALDO is supported by 2 people, four days a week.

RT What steps are taken to ensure there are no breaches of copyright?

Dr T We're about to attend a course on that very matter! Copyright is taken very seriously – it's a big deal and has a lot of grey areas. Where we have "lifted" material from elsewhere, we acknowledge this – and we try to ensure that there are no copying and pasting of text/ images from the content editors.

RT How do you ensure the quality of information provided in ALDO learning?

Dr T Information is checked initially by Sharon and Graham then comes to me to look over for a further standards check. If I find suspect images or other areas of concern, I would flag it up to the service.

RT We've heard already about the difficulty in getting feedback from course participants. If it's not the traditional "happy sheet" used in face to face delivery, how can we improve evaluation of the training that's taking place?

Dr T The traditional method of assessment is not appropriate for the new delivery method. No-one has really solved how to evaluate training properly. At present, all we can say is that people are going back; this implies some value is being perceived/ derived?

RT Are you aware of examples of good practice in evaluation techniques?

Dr T I'm not aware of any. There may be a trend to use the survey monkey approach. It's hard to do a qualitative assessment – we email the users of a course, ask them what the impact of the course has been, what have you learnt, how have you applied that learning – but there are very few replies (less than 10% of participants).

RT Would the feedback be better captured through the EAR process?

Dr T The line manager should definitely be in the best position to know about the training and assess its impact. It's very beneficial if the supervisors get involved- through informal conversations as well as EARs. It should be part of the performance/ efficiency / improvement on-going assessment of staff.

RT How do you determine the "so what" impact of training – is it by seeing how the employee subsequently performs?

Dr T We'd rather flip that on its head – what would have happened without it? There haven't been a lot of complaints- and people tend to complain more than they do compliment.

Jl Does recording training in ALDO on Health and Safety training, for example, mean that the Council is more vulnerable at tribunals?

Dr T We could record what was done under ALDO – that would be sufficient evidence if challenged about lack of training. In other area, not involving practical application, and with no need for face to face training, the move should be to do it online.

IT Would it not be anomalous if the council were to provide people with the evidence to challenge the council in tribunal?

Dr T That would happen irrespective of the method of delivery.

CS How do you draw staff attention to the resources on ALDO?

Dr T We highlight the availability of new course on Arcadia as a news item and in addition we post service newsletters and links to the training programme. We go out and meet service teams on a regular basis. We acknowledge that promotion is key to increase awareness.

IT Do you have devolved responsibility for what's promoted – or do you have to check with Laura and Paul?

Dr T It's up to me to query and refer upwards if I have concerns – it's common sense.

At this point, the members were given their own ALDO log ins and passwords and explored the system for themselves. The web address is: aldo@aberdeenshire.gov.uk and it can be accessed from any computer. The language was considered, with short sentences, active rather than passive to be as open to all as possible. The tool was intended from be used by all sorts of people from every function of the Council. There had been no adverse comments.

IT Could evaluation be as simple as a “did you find this useful”, as Google and other search engines often asked?

Dr T We haven't done that – but it could be simple.

There being no further questions, the Chair thanked Dr Tucker and Miss Armet for the session and demonstration, commenting that ALDO looked to be an excellent system, simple to use, and increasing value to the council.

MONDAY, 23 SEPTEMBER, 2013

MEETING WITH MIKE HEALY, LEADERSHIP AND DEVELOPMENT

Present: Councillors Gillian Owen (Chair), Richard Thomson (Vice Chair), David Aitchison, Nan Cullinane, Jim Ingram, John Latham, Cryle Shand and Ian Tait.

In attendance: Mike Healy (MH), Team Leader, Leadership and Management

MH took on this role with Aberdeenshire Council two years ago, having moved from the private sector. From discussions with Directors and Heads of Service, it was determined what form Leadership and Development in Aberdeenshire Council should take, and booklets and a competence plan were produced.

MH advised that Management Development was the effective use of time, resources, etc. and this had three aspects. On-boarding covered subjects such as Corporate and Service Induction. The first gave an overview of the Council and how it operated, with the latter providing more detail on Service functions. Manager induction would give a framework for the role, responsibilities and behaviours expected from an Aberdeenshire Council manager. Standard operating procedures would be covered. This would include corporate instruction on policies, processes and procedures. Practice workshops would be offered, as well as elective training on various subjects, to give the manager a sound basis from which to develop their skills.

Leadership Development was about supporting employees and the main concept here was that people worked together to solve problems. This was facilitated via three different areas. The idea of 'Concepts' included sharing ideas and best practice through external agencies, such as SOLACE, and this information was disseminated via Arcadia. Leadership master classes were available, as well as a Leadership Forum through which ideas, concepts and theories could be tested for practical application. Peer support developed the idea that internal staff could share their skills and talents through schemes such as coaching and mentoring, and this had proved extremely useful. Managers could attend conferences, from which new ideas could be brought back and developed for implementation. Workshops on various subjects (such as 'Courageous Conversations') were perhaps a better option, as these simulated real situations a manager might encounter, and gave practical advice on dealing with these.

There was no budget as such for Leadership and Management Development but if a course was to be delivered, approval would be sought from an Area Manager, or other manager at that level. Training would most likely be internal as there was now virtually no external training undertaken.

MH advised that from a personal viewpoint, when he took up his post with Aberdeenshire Council, he had seen no collaborative sense of direction. Each Head of Service had their own idea of where their Service should be heading. An external consultant was employed to work with the Senior Management Team in bringing all the businesses and functions together to produce a collective strategy and so provide the direction that was lacking. The plan was to chart the strategic intent of

the organisation five or ten years into the future. Costs for this were to come from the Chief Executive's Service. There was no drive to become cost conscious at the expense of the social conscience inherent in local government. However, becoming more aware of the external market place would be useful to Council managers.

Aberdeenshire Council was open to new ideas and innovations but sometimes found it difficult to adapt these to the practical application of what was required for a local authority. Councils were constrained by legislation from various bodies and had to adapt to meet these changes. When budgets were cut, the Council could not keep doing the same things the same way with less money. The organisation had to reshape and reorganise.

Succession planning was a major consideration, as was staff retention. Learning development would assist retention but only along with other elements, such as pay and the culture of the organisation (whether it is supportive or challenging). Being given the chance to learn new skills and the opportunity to use these, both on a personal and professional level, would help employees to feel valued.

Induction sessions for new employees gave an introduction to working for the Council. These were structured to include a talk from the Chief Executive and a Director. Information on topics such as Health and Safety would then be covered. Service inductions were more detailed. These covered more information on the specific Service, the managers and their responsibilities. Concerns were raised on an internal audit report which stated that many new starts were not attending Corporate Induction courses. These were compulsory and could also be taken on-line. This enabled those working on front-line jobs to access training without having to travel to Woodhill House. It was the responsibility of the employee's line manager to ensure that they had carried out had a Corporate Induction.

Those employees at Team Leader level and above were considered to be managers, although the concept of leadership was not exclusively allied to the pay structure hierarchy. The philosophy was that anyone could be a leader, whether they were classed as a manager or not. Leadership could be practised in your job, with the people around you.

Employees should have an Employee Annual Review (EAR) with their line manager. This was the mechanism through which training and development needs were identified. Succession planning was important but trying to identify future training needs for this was not always easy. If an employee wished to undertake training to equip them for future promotion, they would discuss this with their line manager. MH advised that he felt training courses offered were not always aligned with the knowledge and behaviours expected for performing well in a post. He felt there were also gaps in succession planning. The EAR looked at the current job and how the person was performing. It did not place enough importance on their next step. If more emphasis was given to this, more future development could be identified in good time and this would enhance succession planning.

In response to a question on monitoring evidence of success for those already in post and carrying out training, MH replied that there had been much discussion on this topic but the conclusion was that the cost and effort involved was often greater

than the delivery of the course itself. It could be done but would cost a lot of money. Simple evaluations, like 'happy sheets' were not very informative. Evaluation of what you did with this training once you got back to the workplace would be much more useful.

Training for changes in legislation was very important, particularly in Housing and Social Work but there were two people dedicated to keeping track of this. There was no benchmarking per se in Leadership and Management Development and much of what was gathered was from the private sector.

It was felt that most requests for development came from the system rather than from the person. This was fine in terms of what was required to carry out the job but not in terms of personal growth. We could encourage people to apply for more training but it was not affordable. The system stated what was expected of the employee and from the EAR, development should be recorded. A budget was available for this and the process was well outlined. There was nothing in place to assess if employees were not achieving the standard of the courses attended but if that was the case, then help and guidance would be offered. There was compliance expected on attendance at courses, not on knowledge acquired.

MH came in from the private sector to bring a different perspective to leadership and management. He was looking at other organisations for ideas, thoughts and ways of doing things differently. Training budgets in the private sector were much higher than at Aberdeenshire Council. Training here was more 'cheap and cheerful', loose and cosy than the more structured and expensive training in the private sector.

£2 million of learning and development was provided externally across the organisation, through about 900 different providers. More could be done to encourage employees to look to develop themselves and this should be done through the EAR. This should be an honest and forthright discussion between the manager and employee, focussing on the conversation and the challenge, and less on the paperwork.

Recognition of high potential was not encouraged. It seemed that part of the problem in doing this was there was the perception that there might be a lack of transparency in the process. MH believed that there was merit in recognising the principle but that it would need to be encouraged/sponsored at the highest levels of management.

MEETING WITH FIONA ROBERTSON AND SOPHIE MCKEN, SOCIAL WORK AND HOUSING, 25 SEPTEMBER, 2013

Present: Councillors Gillian Owen (Chair), Richard Thomson (Vice Chair), Nan Cullinane, Sandy Duncan, Katrina Farquhar, Jim Ingram, Cryle Shand and Ian Tait.

In attendance: Fiona Robertson (FR), Staff Development and Training Co-ordinator (Housing and Social Work) and Sophie McKen (SM), Employee Development Officer (Corporate Services).

Ms Robertson reported that she co-ordinated training requirements for the Housing and Social Work Service. She had returned from a three year secondment in February, 2013, and Sophie had covered the role during this time.

The budget for this was £268,000 and this came from the Scottish Government. Originally ring-fenced, it was now part of the general GAE allocation. The budget was multi-faceted, given the range of disciplines within the service. The budget was much reduced, having peaked at £700,000 at the time of the introduction of Registration for Social Workers. This led to a requirement for a significant number of staff to receive specialist qualifications. Much of Social Work training was specialist (such as mental health and child protection). The Housing training budget was £90,000 (with £64k coming directly from the Housing Revenue Account), with £28,000 of that allocated directly to training for housing repairs staff. This was directed mainly to meeting Health & Safety requirements such as working at heights, scaffolding and asbestos removal. The Criminal Justice budget was not the responsibility of Aberdeenshire Council. This, coming directly from the Scottish Government, was managed directly by the Northern Criminal Justice Authority.

Each November, a Training Needs Analysis form was circulated to senior managers asking them to identify specific training requirements for the Service for the coming year. This should encompass individual staff needs, as well as what was required for the Service as a whole. Changes in legislation (such as Welfare Reform) would affect this. This was fed back to Ms Robertson and she compiled a development training plan, along with associated costs. She then met with Corporate Learning and Development to ascertain how many courses they could provide. They were able to provide an increasing range (although there was still a large proportion supplied by external providers), as the necessary expertise required in-house was not available. Once this was fully costed, the Training Plan was passed to senior management for approval. The plan was flexible so that if priorities changed (for the Service or the Council), then so would the Training Plan. Once authorised, the Plan would go to the Social Work Employee Development Officer, who would then contact the best companies to deliver the required training. The first question was always to contact the learning and development team, asking "what can you do for us?" Mrs Robertson advised that this process had been held up as good practice and had originated in the need to report back to Government on the proper application of the funding.

GO What is the split between internal and external provision and delivery?

FR There are a lot of external providers, used where specialist skills aren't available in-house, for example, in alcohol/ abuse related trauma and housing issues for housing staff. Some training previously outsourced was now delivered in-house, such as Risk Management and SVQ 4 in Health and Social Care, required for Day Care/ Care Home managers. This had previously been provided at a cost of £2500 per candidate, with Moray and Dundee Colleges. (I can't remember the exact cost, but think it was nearer £2,500.)

There's also training delivered between in-house and external providers. For example, CALM training, required by the Care Inspectorate from 2005, related to de-escalating aggressive behaviour in adults with learning disabilities and older people with dementia. Previously delivered by an external provider based in Fife, in-house staff had been trained to deliver part of the training, with CALM's input reduced to the theory assessment. The same had happened for Manual Handling and Dementia training where we trained our own staff to deliver in-house training.

SM There's also a great use of in-house skills and experience to assist other staff. For example, when the Children & Families team was looking for help and advice about mental health issues, Senior Practitioners in Mental Health were used as subject matter experts to deliver some of the training.

Training needs were identified from EAR forms (Employee Annual Review), as well as at Service level. All requests for training were incorporated into the Training Plan but Service Managers were able to alter this to what they felt was appropriate. Priorities were discussed on what was required in that area, as well as how any new legislation (and the training required to provide it) would impact on service delivery. The EARS system application scoped room for improvement which were recorded in the EMIS, from which management reports could be extracted which could, for example, identify a queue of 60 people wanting first aid training. However, mainly the need for training would be top down, for example in response to new reforms.

SM There are always pressures on courses such as first aid, with demand far exceeding, so a priority list of applicants would be created.

The Housing Service used skills matrices, which identified the required skills and training for specific posts, although this required to be revisited. This was not widely used in the Social Work Service, however training matrices had been introduced for care homes and sheltered housing staff. The Health and Safety Unit were providing support for a skills matrix to be compiled for all Council employees, specifically tailored to Health and Safety.

SM spoke of the development of the social work training matrix, which sought to identify what was required for the differing roles (Manager, Assistant Manager, Team Leader, Carer etc.) at specific times and for specific levels. The new Health and Social Integration initiative had not yet had an impact on the delivery of training but was only recently introduced. As a result, there was little information on this.

CS Has the recent integration of Social Work and Health Care been a challenge for training?

FR No – it's all been developing at a very high level and a joint approach to training had been in place for a number of years and this was through the Joint Futures Initiative. Jacqui Mackintosh was the NHS Joint Futures Training Co-ordinator. From 2001 Aberdeenshire Council, Aberdeen City Council and NHS Grampian each paid £16,000 per annum to help fund this post and Ms Mackintosh arranged joint training for the three organisations in areas including adult support and protection, ASSIST (suicide prevention), and Mental Health First Aid. It was felt that joint training would increase as the way forward. Aberdeenshire Council felt that the value of the initiative justified the continued funding.

KF How can you ensure that all staff go through the formal induction training?

FR The responsibility for ensuring new employees undertook an induction course lies with managers. There are service inductions as well as corporate induction for new starts and the requirements for supporting new staff are detailed in a pack for line managers which indicated

what was needed Day 1, Week 1 and Month 1 etc. Records on those who had attended, undertaken Corporate Induction via ALDO were kept on EMIS (Employee Management Information System), so a record could be printed off of any individual's attendance of training courses, as well as how frequently EARs were undertaken. These were to be undertaken yearly but in the Social Work Service, less than 50% of employees had a yearly EAR. The number of home carers meant it was not possible to have do EARs more frequently than every 2-3 years. Social Work staff met with their line manager every four weeks for supervision, which would include discussion of any training or developmental needs, so EARs were not seen as a high priority. Staff often saw EARs as unnecessary duplication and a tick box exercise. The highest priority was seen to be looking after the people who needed social work care.

SM referred to the change from ad hoc booking for courses which required line manager approval, to the greater access to courses in ALDO, where the supervisor was merely notified of any enrolments. If need be, any inappropriate choices could be discussed.

SD Is training only allowed for qualification purposes or can it be for the personal development of staff?

FR Training was to progress the individual professional knowledge of each employee and did not necessarily result in a recognised qualification. The Care Training Programme was developed for Care Assistants and Home Carers and this helped them towards gaining their SVQ Level 2. This was a pre-requisite for registration with the Scottish Social Services Council, which was mandatory for all those employed in Social Care and Social Work. By 2020/21 all home carers would require to be qualified to SVQ level – which will include first aid, manual handling and food handling.

RT How is succession planning supported?

FR At present, this is an area for development, currently under consideration, due to both budget pressures and the requirements of the Scottish Social Services Council New Care Home Managers needed SVQ 4 in Health & Social Care & SVQ4 in Management, so succession planning was a high priority, as it had to be acknowledged that the workforce was ageing. A scheme was being developed (for care homes initially) to enable Assistant Managers to carry out the necessary training to qualify as Managers. This would apply to 30% of Assistant Managers. An application form was being developed, as well as selection procedures which would require the applicant to evidence their commitment and enthusiasm. Managers were being encouraged to build capacity into their teams, especially through Assistant Managers.

RT Is this approach in Housing & Social Work any different to that of Corporate Services' Learning and Development Team?

SM No – over and above professional level qualifications, we are trying to encourage managers to build up capacity in their teams. Starting in 2012, opportunities on leadership and management were to be offered and gaps in skills management were to be identified. This was to be linked to a competency framework which would identify gaps in the skills matrix.

RT How closely linked would a competency framework be to the training opportunities offered?

SM This is a work in progress. The Employee Development Team had visited all managers across the services to discuss how this might be achieved. In some areas there were bigger gaps than others and different approaches were required. For example, online training doesn't always suit every need.

RT I assume that when a manager views existing knowledge and behaviours exhibited by staff, these are also matters for development, if required, as well as the provision of technical understanding?

SM It's more difficult to consider this for future development outwith the current role, considering what competencies may be required for any future job. Succession planning is a very new concept for some managers too, so we're at the very beginning of the process for developing future planning.

RT Is there any mechanism to identify and support staff with "high levels of potential"? How well do we identify and nurture talent?

FR Support schemes to help unqualified staff with the potential to progress within the Service were in operation. There was previously a programme to help unqualified family support workers to become Social Workers. This was initiated in response to a national shortage of Social Workers. There was a Housing Support Scheme still in operation. But there were other support schemes – we've paid Robert Gordon University to provide professional qualifications for social work officers and Stirling for Housing officers, specifically to support the move from unqualified with potential, to professionally qualified. We're currently looking to develop a new scheme in Social Work, budget dependent. There was a danger that few management post level openings would materialise and staff would move outwith the Council to progress their careers.

RT Are there opportunities for secondments across services, possibly in terms of core work and not specialisms?

FR There were few opportunities for secondment between Services, although Social Work and Education, Learning and Leisure had some cross-over.

SM It was difficult to identify transferable skills and make the links which would be useful in these cases.

RT Are behaviours and competencies part of the EAR process?

SM There are varying degrees of understanding the EAR process. The EAR was a three part form. It looked at what the employee had done in the previous year, what they wanted to achieve in the next year, and what development was needed to progress their future aims. Where managers had not always understood the links between part two and three, it meant that the future plan was not always clear. Some managers were more adept at completing the process than others.

RT Are competencies and behaviours assessed in some way?

SM EARs is a review, so assessment of competencies and behaviours is not directly included. The competency framework had recently been revitalised and showed specific expected levels for each job, on areas such as customer focus and managing your team, amongst others. It was hoped to raise awareness of this.

CS Are there any additional challenges with a workforce with many for whom English was not their first language?

FR There were a number of staff from Eastern European countries who were working in care homes and as home carers but this presented no significant difficulties, either in terms of language or qualifications held. Front line staff would undergo specific Aberdeenshire Council

training, whatever their current qualifications. Some overseas qualifications might be referred to the SSSC for approval of compliance with their set standards. It was up to them, and not the Council, to determine if this were appropriate.

IT In terms of succession planning and “growing our own”, do you wait till there’s a prospect of a post before offering training?

FR The service would consider any request for funded training in the context of future job availability – to assess the benefit to the Council and Service, as well as to the individual.

RT How do you measure the effectiveness of training?

FR My role is to coordinate training and not deliver it. I’d expect the corporate Learning and Development to deliver and evaluate for in-house provision. Any external providers contracted by the Council would also have their own evaluation processes.

RT How do we assess the difference, the “so what” factor – can we chart differences before and after training?

FR This is an area on which we need to improve. 1 to 1s should be taking place and, after training, should discuss and record the improvement or changes. What did you learn, can we see you behaving/ operating differently because of it. It’s hard to think of how this might be formally evidenced, besides, perhaps, the EARS or 1 to 1 notes. This was more an ad hoc process rather than being common practice amongst managers.

SM The process of evaluation has moved on from “Happy sheets” (Evaluation forms) handed out at the end of a session to assess how effective the training was. Now Corporate Services, six weeks after training, they e-mailed the employee and asked a series of feedback questions (such as ‘Do you feel more confident?’, ‘What have you taken away from it?’, ‘What can you do now that you couldn’t do before?’, etc.). This was augmented by e-mailing the line manager to record their opinion on how the training had helped the employee improve on carrying out their duties. Although this remained anecdotal, it was an improved way to consider and record evaluation.

RT what happens if a line manager vetoes an employee’s training or development request?

FR If the need is identified as part of an EAR, the line manager’s line manager is required to sign off the process. But 1 to 1s augment this process – it should be an on-going discussion, perhaps prompted by awareness of a course being held, or through professional networks.

RT What if there’s a difference of opinion between the employee and their line manager about what is necessary or appropriate?

SM The learning and development policy makes it clear that whilst line managers had the final say on what training was considered appropriate but if there was a difference of opinion, the employee could refer this to the next level of management. I’m not sure that this happens often.

FR It would depend on what the request was for. It should be made clear by managers what was considered approved (i.e. essential), what was ‘nice to have’ (supported) and the reasons informing their decision.

There being no further questions, the Chair, on behalf of the Committee, thanked Mrs Robertson and Mrs McKen for their evidence.

WEDNESDAY, 25 SEPTEMBER, 2013

MEETING WITH PHILIP McKAY, INFRASTRUCTURE SERVICES

Present: Councillors Gillian Owen (Chair), Richard Thomson (Vice Chair), Nan Cullinane, Sandy Duncan, Katrina Farquhar, Jim Ingram, Cryle Shand and Ian Tait.

In attendance: Philip McKay, Head of Service (Roads and Landscape) (PM)

PM advised that Corporate Induction was the start of the employee journey. The on-line option was now used in R&L (Roads & Landscape) but more so for temporary or part-time staff. It was difficult to achieve 100% attendance for this course.

The majority of training was given on the job by experienced, skilled staff. PM advised that there had been a return to using the Construction Skills Certification Scheme (CSCS). Front line road staff were involved with the CSCS card scheme and this highlighted their competencies. An SVQ in certain parts of road work would count towards the CSCS, as would experience from qualifications gained elsewhere. A compulsory health and safety test was carried out every five years through the CSCS. It was hoped to put all roads staff through this scheme in the next 18-24 months. The SVQ programme for frontline staff was supported by four colleagues in HR & OD, who were qualified assessors. Their salaries were covered by R&L. There were almost 100 road staff with an SVQ2, and another ten or twelve who had started on the programme. There were around 100 drivers on the rota for winter services and 91 of those had either an SVQ or a City and Guilds qualification in winter driving. Training on this was necessarily seasonal.

Ten out of twenty quarry staff had an SVQ2. There were three quarries, each having a manager with an SVQ4. This qualification was equivalent to degree level and required a great deal of time and dedication to achieve. The sign shops had four staff, each with an SVQ.

Landscape had 34 staff with an SVQ2, with another 32 working towards it and another 16 ready to start. This had been a slower start but assessments had to cover working throughout the seasons.

R&L were looking to offer more modules for supervisors, to SVQ Level 3. For technical staff (particularly engineers and technicians), our internal Civil Engineers Training Scheme (CETS) is used. The scheme is approved by the Institution of Civil Engineers and the Chartered Institution of Highways and Transportation. This provided a framework for post academic training, helping them to their first professional qualification, becoming an Engineering Technician, Incorporated or Chartered Engineer. Few organisations provided such a structure and R&L were very proud of this. SCOTS (Society of Chief Officers for Transportation in Scotland) may make this a model for a formal Scottish-wide scheme. The softer skills required for effective management were very important, such as being able to present information to Committees.

EARs were used as a means of identifying required training and these were generally carried out annually for office based staff, and every two years for Operatives. A skills matrix was being developed for frontline staff, identifying training which was deemed essential, or additional, for that post. Most of this training was delivered in-house. A skills matrix was to be developed for technical staff and this would be used as the starting point for the EAR interview. The majority of training beyond this point was on management skills and this was provided by HR&OD. It was hoped to look at the potential movement of staff up the career ladder and plan training to prepare them for this. Two staff had been involved in the Public Sector Leadership Programme, which was run jointly by the Improvement Service and Napier

University. This led to an MA type qualification over three years.

Action learning sets provided useful training. Utilising these could help to produce better managers through enhancement of their skills and giving a different perspective on various aspects of the job. The leadership web pages had improved considerably and PM felt they gave useful information to new managers.

PM advised that he did not feel budget limitations were a major issue and that the budget for external training was around £90,000 to £100,000. R&L used professional Institutions and Societies to deliver training and were often given discounted rates. For example SCOTS provides a structured 15 day course for young engineers, delivered in 3 annual blocks of 5 days.

When appropriate a trainer is brought to the area to train a group of staff. This is done when a new piece of legislation is released or if a new piece of software or equipment is bought if appropriate this training opportunity would also be shared with neighbouring Authorities.

There was a training panel which looked after front-line staff and one for professional and technical staff. At the moment, the same people were on both panels to give consistency but this may be reviewed in the future. There were six members on the panel. The intention was to review all EARs by the end of the calendar year and from that starting point, review the training that was considered necessary. From there, it would be the intention for the panel to meet as and when required.

The usual notion of training was that it was delivered in a classroom situation. This meant that sometimes staff did not realise they were being trained if it was being done on the job. Sometimes staff were reluctant to go on courses because they felt that they would fall behind with their work. The EAR process was often a one-way process, particularly with our front-line staff, and it is hoped that using a skills matrix will help by initiating discussion on training as a starting point. For development purposes, the EAR could show where extra training might be useful to cover a shortfall in skills (for example, another trained gritter driver at a location would be useful in the event of illness at crucial times). Local knowledge was very useful but it was important to get that into a form where it could be shared. Experience was important in various posts and a way to pass some of this on to newer employees was through 'cheat sheets'. Further development of the Asset Management System (CONFIRM) will assist by formalising local information, reducing the reliance on individual's knowledge and memory.

The EMIS system was a way of tracking more informal training. On the Landscape side, paper based tick sheets were used to record when training had been delivered. This then had to be input to the computer so that PM could use that information. Once an employee had gained an SVQ, it was not necessary to keep these individual assessments, as the SVQ superseded these.

SVQs were assessed by one member of staff and another carried out the verification on the award. This ensured independence in the process. Consideration was being given to how practical testing might become part of the interview process (for example, a landscape operative may be asked to show how to use a strimmer), where candidates had experience by no verifiable training.

An SVQ qualification did not train the employee, it only assessed their skills. Having trained SVQ staff developing courses meant that they knew how best to deliver training to front-line staff. Training was very much allied to the requirements of the job and not just delivered to 'tick a box'. The training required for a local authority Civil Engineer was different to that required in other areas of industry, so the professional institutions' training courses had not necessarily delivered the best training for local authorities. PM advised that there was now a

local authority training scheme which met the requirements of the professional bodies. It was advantageous for the Council to be able to offer staff training for recognised qualifications.

There were few non-UK workers in R&L but there was recognition of qualifications already held by those now working in Aberdeenshire. There was often no necessity to start again from the beginning. If there was any query on the validity of previous training, the Council would defer to the judgement of the Engineering Council.

Analysing whether training opportunities had a positive impact on staff retention was difficult to gauge. The costs for some forms of training had to be paid back by the employee if they left the Council within two years but this was not a disincentive to moving to another post if the salary was much higher. In terms of technical training, Aberdeenshire compared very well to other authorities. The bridge between technical and management was possibly weaker but was getting better. There was the danger that because something could not be analysed or measured it was not considered worthwhile, when in fact it could be underpinning many areas of operations.

WEDNESDAY, 25 SEPTEMBER, 2013

**MEETING WITH LAURA SIMPSON AND ANN WILLIAMSON, COUNCILLORS'
LEARNING AND DEVELOPMENT**

Present: Councillors Gillian Owen (Chair), Richard Thomson (Vice Chair), Nan Cullinane, Sandy Duncan, Katrina Farquhar, Jim Ingram and Cryle Shand.

In attendance: Laura Simpson, Head of Service (HR & OD) and Ann Williamson, Senior Practitioner, Leadership and Management.

LS advised that full Council had agreed in 2007 that elected members should undertake 36.25 hours of CPD per year and a database was developed to record this. This was accessed through Arcadia, via My Ward Page. The home page gave suggestions for CPD but each Councillor had different requirements and these were linked to the role and duties of an Aberdeenshire Councillor. Councillors were asked to record their own CPD but if any information had been input on their behalf, they were asked to check that this had been done and was up to date. There was no obligation for Councils to publish Councillors' CPD on their website but External Audit asked for information on this annually. This was solely the number of hours recorded and no details were requested on how this was broken down.

The Improvement Service (IS) had published useful information on Councillors' CPD and ten notebooks from the Service were available on Arcadia. The notebook on the Learning and Development Framework was particularly relevant and LS advised that it was hoped to give Aberdeenshire Councillors the opportunity to undertake a 360 degree review against a range of agreed political skills and behaviours. The Improvement Service regularly produced briefing notes and these were circulated to Councillors as an e-mail bulletin. When induction training for the 2012 elections was being planned, HR & OD used the Procedures Committee as a sounding board to ascertain which aspects of the training would be considered useful and which would not.

LS advised that if Councillors were reluctant to carry out CPD, then they could be referred to the political group leader. If training was mandatory, such as for the Appointments or Appeals Committees or Licensing Boards, then the Councillor would be excluded from taking part in that Committee. She said that in trying to address some of these issues, she would visit the Area Committees, rather than expecting Councillors always to have to travel to Woodhill House. Notification of what training was required would come through various channels, such as HR & OD, Legal & Governance and Area Committees. Circulation lists for Committees such as Appeals and Licensing would be checked and Councillors involved would be contacted to take part in the relevant training. It was important for HR to try to capture most of the training Members were participating in but it was inevitable that there would be smaller events HR would not be aware of. This meant that it was important that Councillors filled in their own records. Filling in the information was quite straightforward, in that once the date the CPD had taken place was selected, there was a drop-down list of durations. The time taken to complete the training could be chosen from this list. The database totalled up the relevant hours on an ongoing basis.

Surgeries would not be recognised as CPD, as these sessions would be considered part of a Councillor's day to day duties. However if something arose in a surgery which a Member had not had to deal with before, or necessitated some research work to solve the constituent's query, then that could be categorised as CPD. Members enquired whether attending other policy committees could be classed as CPD. AW advised that if Members attended another policy committee for a specific purpose, and in doing so gained knowledge that would be of use to them in their role, then that attendance could count as CPD and should be recorded...

Committee training sessions could be classified as CPD but evidence gathering sessions for Scrutiny and Audit investigations would not. These activities would be assumed to be part of a Councillor's normal duties. LS advised that having a Councillor CPD group, to look at ways and means of facilitating the delivery of essential knowledge, would be a useful development.

It was noted that Councillors were often expected to be experts on various subjects within a few weeks of being elected. Planning applications were a regular part of Area Committee agendas and new Councillors were 'thrown in at the deep end', in terms of planning, very soon after being elected. It was a concern on the part of HR that new Councillors might be bombarded with too much new information in a very short space of time. It was difficult to consolidate this all at once.

The question was asked if sanctions would be imposed on a Councillor who did not fulfil their quota, given that the 36.25 hours of CPD per year was compulsory. LS advised that as full Council had agreed on this figure, it would be for Council to decide if it should be enforced. She advised that 36.25 hours over a year was not onerous and that more often than not, it was a lack of recording CPD hours undertaken, rather than not carrying them out, that was the problem. The session had highlighted that some Councillors were not aware of how to access the CPD database and consequently, had not been recording their hours. It was proposed to put out guidance on what CPD may be available to Councillors on a regular basis, if Members felt that would be useful. AW advised that the Home page of the CPD recording database could be updated and Councillors would be reminded of this, rather than wait until March, which was the end of the recording period.

Budgets for training were not large and if certain training was not considered a role requirement, it was unlikely that funding would be made available. Money for attendance at conferences and seminars was generally channelled through the Service budgets. If a particular need was identified, it was possible that allocation of funding could be investigated.

There were concerns that members of the public might feel that too much training was going on and not enough 'getting on with the job'. In answer to a question on how Aberdeenshire compared with other Councils on CPD, LS answered that there was sometimes a poor turnout for training but she wondered if the geography of the area was a significant factor in this. It was simpler for Councils in the central belt or Aberdeen City, to gather Councillors together than it was for Aberdeenshire Council, as the distances involved were not so great. LS noted that it was disappointing when external speakers were booked to come along to deliver training and very few people turned up for the event. It was also a clear waste of money, which was a concern for the Council when budgets were continually being reduced.

MONDAY, 30 SEPTEMBER, 2013

MEETING WITH ANNE STEVENSON, CIPD AND RGU

Present: Councillors Gillian Owen (Chair), Richard Thomson (Vice Chair), David Aitchison, Nan Cullinane, Sandy Duncan, Katrina Farquhar, Jim Ingram, and Cryle Shand.

Apologies: Cllr John Latham and Michael Watt.

In attendance: Anne Stevenson, Former Chair, Chartered Institute of Personnel and Development (North East) and Teaching Fellow and Human Resources Management Group Lead, The Robert Gordon University.

GO Good afternoon and welcome to this evidence gathering session for our investigation 24. I'm delighted to welcome Anne Stevenson, formerly the chairman of the Chartered Institute of Personnel and Development and teaching fellow at Robert Gordon University.

As I said, we are taping this session, basically to help the note takers. Once the notes are ready, they will give you a set, and if you want to check them through. If you have forgotten something and you want to add it please feel free to. Equally, if there is something you don't want, please feel free to take it. Generally, we give you set of questions, but on this occasion we have decided not to, so it's a case of if you'd like to give us a presentation, I'm sure questions will flow from that.

AS I am here, not just as a former chair of the local branch of the CIPD, but also in my capacity in my full time day job, as the course developer for the MSc at Robert Gordon University. I have done a lot of course design around learning and development, and when asked to come speak with you, I looked up the CIPD's latest research for you. My handwritten notes summary goes on for seven pages, so please feel free to stop me at any time. Bear in mind that for me a normal lecture session is three hours, I promise I won't take that long!

The first objective of the investigation terms of reference is to understand the employee journey from entry to exit, to consider how training needs might be identified, delivered and paid for, with other improvements that can be made. I thought I would share some of the best practice. I've also brought some papers that you can have a look at afterwards, which goes into some of this in more depth.

First of all, the main thing is how learning is identified. We could literally be here all day as this is a vast issue. The important thing to recognise in learning and development that it starts right at the very start, before the employee comes onto the organisation. That's the point at which you start to collect details, and then develop the process further through main induction process. Most organisations these days have some form of performance review, either formally through some employee performance appraisal, which I'm sure you're all familiar with, or informally through things like observation as well.

One of the absolutely essential things for identifying the training needs of an organisation is to have a documented strategy for operational change, as this shows development needs, not only for individuals, but for the organisation. For example, any move from hand written presentation, through to how to do PowerPoint on the computer, should be documented and the attendant learning needs identified and supported across the organisation.

Priorities within organisations can also give you a really clear idea of what your learning and development would be. For example, for something like Aberdeenshire Council I would expect areas such as customer service to be a clear focus, in terms of whether this is right for the local community. Some people have the “gift of the gab” in training, this can be extremely important within the learning culture of the organisation. If an organisation has an informal learning culture, where everyone is learning from everything they do, and moving forward, that can also be really instrumental in helping to move the organisation as a whole forward, because people are continually developing their own practice and getting better at what they do just on a day to day basis.

Leading on from there, I looked at managing deliberate changes and delivery trends. CIPD highlights the previously held common misconception that learning and development was going to be theory learning. Those of you that have experienced this will know there are good things and bad things associated with this, but generally speaking over the past year, the CIPD research shows that the most effective method of training, the one that we’ve been doing the longest; is on the job training. Here you can actually learn what you need to do while you’re on the job as well. In-house development programmes, as opposed to external development; is probably far more useful in some ways, because the people delivering learning and development understand the organisation and what is trying to be achieved. External sometimes can be a hit or a miss, but there are ways of overcoming that. In a similar way, coaching by line-managers was found to be very effective. These are the three things that organisations report as consistently being most useful in meeting training needs.

Next on the list of effective training, is off the job instructor led training. The problem with that can be getting to apply it in the workplace. You can teach me statistics and take me step by step through it in a classroom; at that point, I can do it, but don’t ask me to do it on the job. It’s this transfer of facts and theory to the realities of the situation which proves challenging. So that’s why on the job training is more effective. It makes the theory real.

It’s generally assumed that e-learning is going to be the method of choice in taking learning and development forward, but only 15% of organisations surveyed by the CIPD last year ranked this as the most effective way of learning. There are a number of reasons for this, and first is usually the way that we use it. Remote learning doesn’t always work by itself, it can, but it rarely. What you have to do is tie your learning back into other mechanisms as well. For example, if you say to someone “let’s do a skills training session”, on something like interviewing, get them to do the reading and preparatory exercises online, and then provide an opportunity to practice, face to face, doing simulations. This helps to embed the learning, and allows you to use the E learning effectively, but on it’s own it’s not the most effective way. Where it’s really good is in supporting statutory training that everyone has to go through. For example, the University recently went through fire safety training as an online module which we were all able to access and complete in a relatively short time. Interestingly, the public sector tends to use more E-Learning than anyone else, and what I have found from my students over the past few years, is that the public sector are doing it better, generally speaking, because it is really good at keeping up to date with what the latest trend is, and making sure that they understand what it is that they are trying to do.

In terms of how many organisations actually use E-Learning, the CIPD research indicates that about three quarters of organisations use E-Learning, despite its known drawbacks. Breaking this down by operational sections, Public sector use is about 90%, compared to 61% in manufacturing, and 64% in non-profit organisations. Also, larger organisations are much more likely to use online learning, so I would expect to come into somewhere like Aberdeenshire Council and find that E-Learning is part of your portfolio of learning activities. I think too, in terms of larger organisations if you’ve got a large range of services then there are advantages to e-Learning as well. That then has to be tied back into a learning and management system. My experience is that the larger the organisation, the more difficult it

is to effectively co-ordinate who needs to learn what. If your learning management system is not in place, then your e-Learning could lead to people who “didn’t hear it that way”, or someone who is doing it another other way. Some mechanism has to be out in place to pull it all together, so that everyone with these skills are doing it jointly.

Another potential problem with e-Learning is the variance in completion rate. I’m not sure if any of you have ever gone through an online course? I did and I was hitting my head off the wall regularly. It was absolutely diabolical. I HAD to complete it because I needed that particular certificate, but it wasn’t user friendly. You can often find that people tend to start online courses and don’t necessarily complete it. That’s something to look out for.

The CIPD believes the way forward for online learning is to make sure it is part of a package of the materials, rather than stand alone. They recommend people to concentrate on selling their existing e-learning packages, and learn from those how to move them forward so they can serve their purpose in the future. I am a great believer in making sure that things are not just fit for purpose just now, but, to use a term which I hate, are “future proofed” as far as possible. We can if you wish, at some point, move onto future learning in environments but I thought rather than do that just now, we could pick that up later.

I suppose the other thing I wanted to say about e-learning is that people think it’s easy; people think that it’s something you can do automatically. Over the past few years my team at the University have been through the painful process of establishing online courses; we know how difficult it is to develop the materials and how difficult it is to keep them up to date. One of the things that worries me about online learning is that if the resources are not there, and if your organisation doesn’t have people with the right skills, then the online learning is not going to stay up-to-date and current. There is a huge administrative burden in terms of maintaining updates. We need the people with the right skills.

In terms of the kinds of things that we can use to delivery learning and development, it varies from webinars to face to face classroom delivery.

I have already briefly mentioned a learning management system, and again I would expect an organisation the size of Aberdeenshire Council to have one of these. This would be a software package that covers things like administration, tracking, recording, and sometimes the delivery of education and training as well. One of the things that this type of system would allow is to consider the need for the same types of training across the whole organisation. If you’ve got a competency matrix, and you know which type of competencies that different people at different levels in all the different services require, it’s then much easier to co-ordinate your learning and development package and organise something which people will find fit for purpose.

In terms of future proofing, we need better integration, coaching, organisational development and performance management support systems. I don’t know to what extent your Council is going for the organisational development; it’s an area of concern in the context of current public finance pressures. I think it is very difficult for organisations not to be doing that now, but there has to be a clear link between all of these factors, so people understand what we are trying to do. Clearer integration, or the linking of learning and talent development with business strategy, is critical. I’ve a print-out here on aligning your learning and development to corporate strategy and how best practice recommends this should be done. This can help to drive forward strategic change.

In terms of both of these areas of coaching and organisational development leading to strategic change, previously the public sector was lagging behind everyone else, with integration more of a focus for the private sector. Now there is a growing recognition amongst the public sector organisations that these links need to be made.

Another aspect to consider is the increasing devolution of learning and development to line managers. There is a huge debate over whether or not learning and development should be the responsibility of the learning and development function, or whether it should be the line managers. My response? Over all the years I have looked at this area, I believe it should be primarily the line manager's responsibility, but learning and development specialists need to make sure the systems and procedures are in place to get things up and running, and to be able to support the line managers.

The other thing I would highlight is the business of evaluation. More and more organisations are recognising that there has to be a demonstration of value for money with regards to training budgets. That's a really difficult thing to do and I don't think there are perfect answers but I will come back to that. That is definitely an area where we are going to see increasing emphasis.

The public sector is ahead of the field in preparing for increasing use of e-learning. There are clear differences between the public and private sectors here, and looking at the third sector gives us a whole different picture again. It's possibly because of the size of public sector organisations that they are leaning more towards e-learning than anyone else.

A final issue is a trend which I think organisations could ignore at their peril. It is an increase in accepting the benefits of social learning. That says we should recognise that we learn from everything that we do, that we learn from each-other, and that, in many cases, learning is not something that you could easily do in isolation from anyone else. Just to give you a very brief example, it might be things like webinars, maybe chatting to people at the water cooler, or the smoking shelter. This is informal learning. It's a real and growing trend, but it is very difficult to understand how it works, if the organisation is to capitalise on it. Informal learning, by its very nature means that people don't write it down. It's hard to capture how we improve that, but, for me we need to try this, because it's one of the easiest ways, and one of the quickest ways, to disseminate information within an organisation.

From your terms of reference document, one paragraph made me want to run screaming from the building. It is the issue of training budgets, because I think that's how a lot of HR people look at anything to do with figures. Just to give you an idea. In the public sector, in 2013, the last survey that we did shows that the public sector spends, on average, about £250 per employee per annum. This is not a lot of money. Having said that, the industry average, across all different sectors, is only £303, so the public sector average is not far off that. But it has reduced from £311 in the public sector in 2011. There are therefore differences in the overall allocation, as well as in how people have to use their money. Another thing you might want to consider is what organisations include in their training budget, because there are a number of different things. Most cover things like external courses and conferences, the hiring of trainers and consultants, and books and training manuals, but you also have to ask, does it cover the technology? Does it cover mentoring and coaching; psychometric assessment, mixed costs, integrated learning management and delivery, and salaries for in house trainers? We need to be sure we're comparing like with like, and all these things add up. To understand the training budget, you have to understand what that covers and what that is split and accounted for elsewhere. I'm sure you're aware of this and I apologise if I'm sounding patronising. Some of the difference in accounting goes back to how much is devolved back to the line manager and how much is central services, and that's something that we've already mentioned.

From the CIPD survey, what surprised me was that the average hours of training for an employee per annum was 25. This seems very low, given that training and development can help improve performance.

Further, the CIPD survey tells us that the move from structured trainer-led training to collaborative learning is increasingly continuing, with an increased focus on business and organisational strategy. There's an increased focus on delivering through technology, even though we recognise that we are not always getting the technology right. Life-long learning is really important and one of the other things the CIPD can provide is executive guidelines for continuous professional development. If you can tie that in with the training that's happening in the organisation it can actually help to boost the benefits of your training budget. Also, we need to find out how we tie metrics, i.e. quantitative detail about what we're actually using, what's actually happening in the organisation, with the quantitative detail that the actions of the trainees reflect. Quite often what happens in the evaluation is that we check up whether or not the employee actually enjoyed the training, we get the happy sheets, and we don't bother to check if they actually learnt something, and were able to apply it in their daily tasks.

Turning to assessing the impact of learning and training in development, generally speaking one of the things I've just mentioned, this idea of using HR metrics. These are one of the things that you can use to use to look at your training budget, and decide whether or not it's being well spent; it's not just to improve the skills of the organisation, it's also there to show your employees that you're wanting them to develop as well, to give them the necessary skills to do the job properly. In that way, they perhaps won't then take time off due to sickness, or absence caused by stress because they can't do the job, or to leave and go to another organisation. You can look at your HR metrics and map things like absence, sickness, retention, engagement and performance and find out how those figures are performing. This gives you an idea of how effectively applied your training budget has been. Now clearly looking at these metrics in isolation is not enough; you need to look at the organisation's direction as well. If you have high labour turnover, then it may mean, for example, that the development needs are not being met. That would obviously need more investigation and once again, in this particular instance, the private sector tends to be ahead of the public sector in this area. Generally speaking, they are more likely to look at HR metrics.

The other thing that people tend to look at is return on investment details. Now, return on investments sounds like the best way to do it, but it's actually really difficult to do because if a training course costs you £4000, how do you decide how much you get back from that in terms of productivity, or in terms of capability of your workforce? You can understand how that's a really difficult one to do but if you can do it, it can be really informative.

There are other useful tools in key development data as well, such as 360 degree feedback, which you can use through your appraisal system. What most organisations use is a very old model, Kirkpatrick's model of evaluation, and I would be very surprised if there wasn't some form of it running through Aberdeenshire Council. The first measure in this model is people's reactions; did they like it, and what did they learn? The second is learning, what were the changes in knowledge, skills and attitudes? The third is behaviours; how did we change the behaviours of the jobholders? Was there a positive impact on the organisation? The last factor is an assessment of the return on investment of the cost. These are the kind of high level indicators that most organisations use, but there are other models which could be used as well.

Long term methods are also recommended in terms of evaluating training. Things like appraisal and performance conversations clearly are already ongoing throughout your organisation. Measuring performance on a regular basis again can identify areas for action. I would mention customer satisfaction - I'm sure there are plenty of those in Aberdeenshire Council, could be assessed and be enough to keep you going for a very long time in any skills gaps analysis. These can all be used to evaluate how effective the training we have

already done has been. But of course, that then helps to identify the training needs, so it's very much a cyclic thing.

However, one of the problems of the evaluation of training is that managers don't normally see it as a priority. There can be a wee gap for learning and development for managers to ensure that they do. Also, accessing the data can be difficult. These are the things that can cause problems.

One of the things I mentioned earlier was strategic aim. I brought a research paper for you to have a look at, but briefly, all organisations need to do a number of different things and if you look to see how well the strategy is aligned with learning and development needs, these are quite useful pointers. Do you commit resources to the learning priorities? Do you take full account of learning considerations in strategic discussions? If any of you have been in HR, you will know one of the debates has always been, are HR doing something that is worth doing? We don't always have a voice at the board. I would say that for learning and development it is equally crucial; do the people actually at strategic decision making level consider learning and development considerations required to support what they want to do?

I would expect to see any learning and development function working closely with, for example, heads of service, and other managers. They would encourage continuous development and identify outcomes, so the continued professional development goes back to the culture of the organisation and also making explicit links between the learning outcomes and strategic goals. What I have found over the years of mentoring students of HR, through a range of different projects, is that that's one of the linkages that organisations are not terribly good at. They can't say how the key strategic goals relate back into the learning and development plan and provision, because they don't often use that to show whether or not the learning and development has been effective. We also need to have some sort of clear measure of assessment of learning outcomes, and expect the learners to continuously evaluate and help develop the learning strategy, i.e. the learning and development specialists. There is an awful lot more involved than just trying to get the learning and development right.

In terms of assessing and evaluating learning and development contributions, the CIPD have recently done more work in this. Again the papers are in this pack for you. The survey looks at some of the different approaches, and that could include things like learning function measurement - how effective is that learning function? Does it do what it says on the tin? The next iteration might assess how far were the anticipated benefits realised - did people get what they thought they would get? Return on investments I've already mentioned. This is something which I think is particularly relevant for the public sector, because they seem to do so much more in benchmarking themselves against other people. I notice that benchmarking is part of this scrutiny process for example.

The CIPD's evaluation is that this (assessing and evaluation learning and development contributions) varies from one organisation to another, but a lot depends on senior managers, and there might be issues in establishing their trust in and awareness of their role in the learning and development process. It goes back to the context of working together in meeting the organisation's requirements for a learning value metric – what should be measured to gauge this? The bigger the organisation, the less likely they are to have that focus. The focus and the emphasis is often on short term learning, which sometimes has to happen whether it's developing the skills from the future, or on longer term development. Again, I'll leave a paper which poses some salient questions, which you might find useful to look at.

CS – The e-learning scheme is basically self-learning; how much of it is constructive learning?

AS That would depend on the both the organisation, and the content of what you're trying to do. For example, the two things which I am most closely involved are firstly the learning things which I have to undertake as a member of staff at RGU, and the other is the courses I develop and the materials that I put online for my students. I spoke of my own experience in completing the staff fire training. I had to work my way through the package, and answer some questions - and no-one came near me. I'm not sure I learned anything from it, I answered all the questions but I'm not sure I learned. If you take it to the level of trying to do a master of science online, then it is a totally different experience, because RGU have, in addition to the virtual learning and the depositary of the materials for the students, virtual classrooms. We have online tutorials and, whilst they're not strictly face to face as we're asking the students to work their way through exercises, we also ask people to get together in study groups. The concept of collaborative learning is really important for them. A lot of organisations use that particular model, in terms of giving the details first of all, and then arranging practical application or discussion sessions afterwards. That seems to be best practice as we know it at the moment, because we are allowing it to happen in more ways than just as a means of providing study materials.

CS So an assessment could pick up on whether, or not, someone has learnt?

AS Yes, the assessment can be a really important tool for letting you know whether or not people have taken it, but it goes back to this problem with the evaluation. Don't ask me what a yellow fire extinguisher is for. I did it; I got the answers right on the day, but I can't remember now. That's why the ongoing evaluation over time is important as well.

CS Are there certain assessments multiple choice tick boxes?

AS It depends. For something like the fire training, that it would be a tick box; for something like our students that are doing an MSc online they've got exam papers to write and there can also be practical assessments of things like interviewing skills. In that instance you're going to get people doing their own thing and assessing at the end.

Jl I was disappointed and somewhat surprised when you said that e-learning was probably effective just 15% of the time. It is disappointing because it seems to be the way we are going now, using electronic methods wherever we can. Could you explain what surveys you've done and how successful you feel they are in common to that figure.

AS I've given you an idea of what CIPD's latest research is showing, and it's not that it's only effective in 15% of the time, but that only 15% of organisations rank it as one of the most effective methods. So its not that it's not effective, because there are times when it definitely is effective. I would say that for my students, and plenty people in Aberdeenshire Council as well who have done it, it is effective, but it's not considered the most effective method in isolation.

IJ I'm glad to have that clarification – I'd obviously picked it up wrong and thought we were in danger of wasting 85% of the training.

AS Absolutely not, there are ways it can be done, especially when you use something else alongside it, rather than using just as an online repository.

SD I'd like to congratulate you on the presentation: you obviously known this subject inside out, and done your homework. You've obliterated the five questions I've got on my pad. I wonder if you could give us more information about the learning and management system?

AS I have to come clean and say this is not one of my areas of specialism, because this is technical, and I don't do the technical side, but basically it is a system where you can do all the administration for learning and development, you can record the training people are doing, who can deliver it; you can design it, all in a single database. One of the most effective uses is I think through something like a competency matrix. The competency matrix is just working out what skills, knowledge, and attitudes people need to be able to know and do to have the job. I would be surprised if there wasn't a competency matrix lurking around Aberdeenshire Council. Each different job has a different competency matrix and you can use it for things like employee performance appraisal, and working out where people are on the scale, and in this way, identifying training needs. The bigger we are as an organisation, the more complex the learning and management system becomes, but it does help you to keep track of who needs to do what, who has done what, what is available, and what still needs to be developed.

SD So when you talk about a system, you're not actually talking about a computer programme, you're talking about the subtotal of everything involved in the system is actually doing?

AS You can actually get computer programmes which supposedly do it. I have never actually looked at them, because that's something my other colleagues in the information learning department would be able to tell you more about, but I know organisations which have used them and seem to think they are successful. However, these organisations are not the size of Aberdeenshire Council.

Any system would clearly rely very much on people to put in the information and to keep it up to date.

RT In terms of the competency matrix, I take it when you were talking about the knowledge that people will have, and other will need for their job? Also there will be others around the various levels of performance, and across the organisation there will be different ones that focus on recording. How closely should each competency be to be the training that is on offer, to make sure for one level, for one customer service, and your next job your actual job will be. How closely aligned should the training be? Or is that not worth assessing?

AS That's a difficult one. The main reason I would say, it depends on how important that skill is, and how the organisation is managed. I have members of staff for whom administration is their strong point, and others where it is not. It's part of the competency matrix for it, but I choose to build on my team's strengths, rather than overcoming their weaknesses. I don't want to put anyone off coming to work on a daily basis, so there is that particular aspect. If it is something like a strategic priority, let's go back to the customer services I mentioned, then all your training and learning and development should be closely aligned to meeting the specific competencies which you know people need in the organisation. The problem with learning and development is that it's not called development for nothing, so whilst there are certain skills you need to do the job you're in, there are certain skills you need to do a job perhaps further up the organisation. There are certain skills that people would like, because quite frankly they would get them out of the organisation that they are in, and give them the opportunity to move further forward in their career. What you can do is put it down to the basic core competencies, to which the learning and development should be very closely aligned. After that there may be supplemental competencies, the ones that are extra which you may wish to develop. In an organisation that sometimes boils down to two things; the first of which, how much money is available to do that; and the second, regrettably, it's who you know, and whether or not they can organise the training for you.

RT You said that line managers are usually the best to determine what training to whom and when – you didn't say "gate keeper", but let's go use the word. What if you've got a line manager that decides to withhold training for their own reasons, good or bad? How do you manage that competently in your learning and management system?

AS I don't think your learning and management system is going to throw that up as a regular occurrence, unless there are some mechanisms for reporting on it. Let's say for example, we are doing benchmarking across department and you notice that there is a department that is spending less on its training budget than anyone else, then you might want to ask why. Or it might be that you have people taking out a grievance procedure, to highlight something like that. But there's no one way or system of easily highlighting that without actually sitting down to go through the metrics and comparing one area to another. Alternatively you could encourage staff to turn round and say, I asked to do this, they wouldn't approve it.

I suppose the other way you could find it out would depend on your performance appraisal process. There's usually a senior person up the line who has to sign off on all the performance appraisals, so if there were a manager/ gate keeper here who was stopping it, then this person should be looking to find out why, and there should be a full record of what's happening. You will have noticed that I said "should" and not "would".

RT So looking at how Aberdeenshire might want to develop its approach, some of what you've suggested as good practice are beyond the scope of the learning and development box, such the corporate strategy permeating all the way through the organisation's learning and development priorities. I think most employees through the organisation should have look at core briefs and, in that knowledge, consider what could help advance their competencies. Some of these will be common across the council, and training should be aligned wherever possible; other matters will be an actual on the job requirements which might be harder to quantify. We just need to adopt the core elements of a successful policy industry.

AS Yes, but again, this it is this focus of what are you actually wanting to develop, because more and more organisations are recognising that there are people who have the technical skills, but what they don't have it the soft skills to go with it. I think it's about defining those competencies to recognise it's not just what's needed to do the job, it's sometimes the soft skills are the ones we miss out on. Those are the ones where people fall down, so it's making sure you cover all the knowledge, all the skills, and all the attitudes that are absolutely essential for the job and then being able to, if you can, add the extra "nice to have".

RT You spoke about judging value for money, and it being very difficult to judge value for money depending on the type of organisation you've got. Being a social worker is more difficult, and maybe more value for money than if they are training as a social worker. Apart from customer satisfaction, it would be easiest to assess where you've got a production line deployment. That would be easier to judge in terms of training being value for money.

AS Absolutely, it's fit for purpose, and for something, like you say, as a production line, you can easily do it because you can say, what have we spent on training, what is it, and how much of that is an increase in production. There is always a thing that it's not simply the training that impacts production, it could be illness, it could be there's a dip in the market and we've asked them to go slower; it's looking at it realistically and realising that anything to do with regard to learning and development might have an impact. Social workers aren't as simple to compare, and that's why the HR metrics come back into play; you look at it from the point of view of different factors; some might be countable, like time taken over cases, and also the number of cases that have been successfully resolved might be an indication of how well your training is doing, but you also have to look at it at more of an angle. A starting

point might be determining what are the measures of a successful social worker, and then measuring performance against these criteria, for example, have we increased the number of cases, or are we spending less per head on resolving them, before judging if the training and development budget has been well spent.

CS Do you find it that the soft skills are reasonably well handled in awkward situations and can they be developed in training? Surely people either have it or they don't have it.

AS In terms of soft skills, of course, you're going to get people who are naturally good with people, but we can actually do a lot of training to help with soft skills. For example, we are working with a company of engineers who are not traditionally keen on soft skill areas, guiding them through a whole range of training, including things like conflict resolution and management, and managing difficult conversations. These are actually areas where you need to get people to practise face to face, but the preparation for it can be delivered through e-learning, followed up by doing face to face practice afterwards. These is an extent to which you can teach people those soft skills, but there is also an element sometimes of you can lead a horse to water but you can't make it drink.

CS What kind of training is more important, soft skills for someone who is grumpy, or technical skills for someone with all the soft skills but would have to look up to find the technical details?

AS My choice always would be to go for someone who has a reasonable skill in both. But, in fairness, more and more employers are saying to me, "get me the soft skills, and I'll do the rest."

RT Who's doing this best? Are there any examples in the private sector that we could look at to see all the elements of which we have spoken, from which Aberdeenshire Council can perhaps learn something from?

AS Who's doing this best? In a word, no. I haven't recently looked at case studies, but I know in the CIPD publications there are some case studies as well which might give you an indication on some organisations to go to. A lot of organisations have tried hard to put everything in place, but you can see from the investigation brief, it's such a massive task. If I'm being honest, there are times I say to people, "If you want to find out how to do it well, go and talk to Aberdeenshire Council." Aberdeenshire Council have got a really good reputation for what they do in this area. Shell always does things well, and if someone from Shell is coming to talk to you, then I hope they can demonstrate learning management systems. They did this very impressively with my students.

JI I think delighted we're considered so highly. I'd expect Shell and so forth to have quite clear and substantive areas of work, and more than we have. We have far wide and need a more rounded approach, which can follow a track and namely concentrating on the key work.

AS I think that's really important as well to understand the nature of the organisation in all this, and as you've pointed out, Aberdeenshire Council is a unique entity. It covers a very wide range of services and a very wide geographical area. To be honest, I'm glad it's not my job to make sure this is working properly.

SD You suggested that off the job training might not always be very effective, and what are your fears with face to face training?

AS We all have fears about going into a classroom, learning something and then going back into the work place and forgetting what we have learned. The first thing to consider, is

it a task that's done regularly? If you're going on a training course to do something you only do once a year, there's a high chance that this time next year you will have forgotten again, so there's a lot to do with timing. There can be a lot to do with how you transfer that learning back into that workplace in that particular instance. If you're teaching someone in the canteen, say to make a prawn cocktail, they can do it perfectly in a training situation; but when they're in a busy kitchen, with umpteen people round about them, shouting "get them out now", then that's when they miss out on the extra wee bit of cucumber. It's making sure that you actually teach someone properly in the first place, give them the space to practice, and also, once they are back in the work place, allow them to use the new skill immediately and frequently in the real work situation.

That's why on the job training is so much more effective because people are learning in the actual environment, and they understand the pressures that are there with them in accomplishing the required tasks.

One of the things that I mentioned very briefly was the idea of coaching and mentoring, and I think that to transfer the development to the workplace more effectively, people have to have a mentor. When I worked in offshore catering, we called them "buddies", and you went to your buddy if you were stuck or struggling, because they could help you. It's having somebody else to go to help you to transfer that learning back and appraising what you do. And that again take me back to the culture of the organisation and recognising that people learn at different times at different speeds. So it's got to be a learning organisation, where that type of thing is expected and accepted, though people might take a wee bit longer and might make the odd mistake, but as long as it's not life threatening, it wouldn't be too drastic.

RT I wanted to touch on the role of the learning and development team in recruitment and retention. Aberdeenshire Council shows a recurring challenge over the last couple of years, most of which has come down to salary positions not being filled, and it's difficult to get people through the door. Aberdeenshire Council is obviously committed to a high range of public accountancy, and has the restrictions you'd expect of a public sector organisation - if you wanted the same sort of culture you might work in a university, or for the NHS. I'm interested in the role that training can play in terms of allowing staff to feel that Aberdeenshire is an organisation that will value them and nurture them. How best can you engender that in an organisation?

AS I think a lot of it has to do with trying to help people to resolve their aspirations for how they want to develop, but yet are still tied in with the objectives of the organisation. Recruitment and selection is the first stage and that's where we should be starting to identify people's training needs but also find out what people's expectations are, and then help manage those expectations on the way through. There is a lot of research which shows that people have very different reasons for leaving organisations. The first one is because they don't get on with their line managers. People don't leave organisations, people leave managers. Secondly it's because they feel undervalued. A lot of that undervalued is feeling they are not being allowed to develop their skills and expertise in an area that they want to do. You will all be aware that more and more organisations are faced with more and more constrained budgets, which makes it increasingly difficult to provide the type of learning and development which would be nice to have, rather than that which is specifically necessary for the job. I think a solution lies in finding ways to tie back the learning opportunities that they want, to strategic priorities. We should also recognise that sometimes people, rather than working their way up the hierarchy, might want tangential development in other areas. One of the things the public sector seems to use more than the private sectors is secondments and job rotations. Whilst they are not necessarily the most effective way of learning, they're quite good at helping people develop new skills and that can help to retain people in the workplace as well.

RT Obviously once you're out of the graduate level, how does an organisation support staff who want to go back and do a masters or something like that? Are there any tax advantages of the organisation that could apply to training and development?

AS It's not something that I could answer. Organisations do regularly put through students through university. I'm not sure how that then impacts upon the tax situation.

RT In principle, is that a way people could go within an organisation, within learning and development?

AS A lot of organisations have the pay back clause; in that if you go for further qualifications, we pay for you to do this, then you pay it back if you leave within a certain timescale. Very few organisations actually put that into practice when it comes to the bit. My own feeling then makes it less of a retention tool. Do we really want to hang onto somebody who wants to go, just because they've got funds to pay back? Because you're then losing the goodwill, losing their engagement...it's a difficult one to call.

RT What about learning and development for its own sake? Is that something you encourage within an organisation?

AS Absolutely, because you never know where creativity is going to come from. The more someone knows, the more skills they have, the better knowledge they have, the more likely they are to come up with ways to make Aberdeenshire Council revolutionised overnight and become completely fantastic. It is a whole business of looking at it and saying "right, it's ok, someone wants to develop into that". It might be that someone is going to be doing evening classes in computing. Let them visit the work place if they possibly can because they might be the person that runs a better way to do it. I work in a university, I'm all for learning and development. It's what it should be, lifelong learning and development is the way forward. It helps to give people more skills and that helps to make the organisation creative. The creativity turns into knowledge, which we can then use to improve our services and give us a better track record.

GO You said earlier you were going to come back to information about evaluation.

AS Organisations generally speaking don't evaluate well enough. If you look at something like Kirkpatrick's model, the criteria organisations tend to stick with revolve around this whole business of trainee's reactions. You might go on a training course, but how do people know whether it's actually been useful to them or not? You don't, so what happens normally with the evaluations is that we check people's reactions, at the end of a training course, and we get the "that was fab, I really enjoyed that". We don't go back three months later and check-up, perhaps via the appraisal system, or whether or not the skills learnt are actually being used. We don't go back a year later and make sure they're still using that good practice. We don't walk past them when they're making their prawn cocktails, to make sure that wee extra bit of cucumber is still sitting there. It's recognising the evaluations don't just happen from the point of view of the trainees, or from the one off basis. From the point of view of the assessment of the person who delivers it, you will all have been in the situation where you come out of somewhere, and think, I could have done so much better – the challenge is in how the training department actually act on that and whether they do something with it. Do the learning and development specialists look at what they're offering, to see whether it's what people want? Do the line managers check to see what they have authorised has actually been taken up by their staff and what's actually helped the department? Evaluation is not a one off. Everyone has to evaluate their impact, not just immediately and in a vacuum, but over time, and in context. These assessments have to be continually updated so that learning and development staff can monitor what we're doing, think about it in terms of value for money and how we can do it better.

SD Is that a selective benchmarking tool?

AS Yes, absolutely. Benchmarking is very difficult because you might want to look at the differences in terms of geographical specification, for example. Benchmarking is a process that works only if you are really careful about what it is you're trying to do. But also it relies on other people sharing what they do, which isn't the easiest thing, because we do it and we don't want you to know, and we don't want you to become better than us. As well as being careful in choosing who you are benchmarking against, you need to be clear why you are doing a benchmarking exercise. If you're just doing it to say, "we're better than you", then there's no point in that. But also, as well as external benchmarking, I would be a strong advocate for internal benchmarking, in particular to make sure that the gate keepers are doing things properly. What are the stats for the departments? What are the absence rates for the department? What are the retention rates for the department? There can be indicators there, within an organisation's own internal benchmarking, that there may be a problem to do with learning and development.

CS Turning back to the soft skills, you can put in an appraisal, you can assess things like the actual thoughts of being a social workers. Then the soft skills are the inter-personal skills. How would you assess judgement skills if they were facing a set of situations and role playing how they would react? Are judgement skills a harder thing to test?

AS Skills, in general, can be tested through psychometric tests. They can be used to assess judgement skills. It's also beneficial to use feedback from line managers who are doing that informal appraisal on a regular basis. We should be able to see that decision-making process that their colleagues are going through to make sure that judgement is right - we don't just tend to let people go out and do their own thing. This is a case that again suggests that learning and development is probably best organised by the line manager, because it's about knowing the staff, being able to understand what their capabilities are, and to work through that process. You can even just do it in terms of in-house exercises, which are fairly routine in the university. For example, I have exercises around judgement and what staff would do if a student did XYZ, and why. Some of the answers really surprised me. Again it's something that can be talked about in the context of team and further develop the skills as a team. There's a concern sometimes that assessment this way can be subjective, because if someone doesn't agree with your judgement then that could be a problem.

CS I know that in my role in the Council's Appeals Committee and in the Licensing Sub-Committee, we're hearing all the same facts, though presented in contradictory ways. We all come to our own assessments. I can see that this judgement of, for example, a social work situation, would be hard to do.

AS If anyone is subjected to judgement assessments, there would have to be clear criteria in things which people should be assessing. If these are in place, and if they are in line with what the organisation expects, then the judgement could be considered to be good. If it wasn't in line with what the organisation expected, then it wouldn't, so it's pulling all the different strands together. Soft skills are not easy, but sometimes it's really obvious to see when people don't apply them appropriately.

GO Line managers appear to have quite a bit of scope. At another evidence gathering session it was interesting to hear witnesses say they really don't feel line managers need to formalise any sort of evaluation, because they see their individuals on a monthly basis. But there is no formality, and it's not formalised. How would you view that?

AS I think there has to be an element of trust in the relationships; where the employees can trust their line manager, and where the line managers can be trusted by those further up

the scale. However, there has to be some sort of formalisation assessing how the employee performs and I think you have to justify the judgements you're making on individual's performance at some point in the year, and give evidence as a basis for the judgements that you're giving. So whilst informally is better than nothing, at some stage (in terms of performance appraisal), there ought to be a more formal meeting which is recorded.

SD You mentioned informal learning, I agree completely with what you said there because in my own experience in a local Association. We meet one evening the month, and sit and discuss things informally. In my experience you can pick up a lot of details, tips from speaking with your peers. I learn a far lot more than I ever did going to college lectures. So you would encourage coffee breaks chats or talks within an organisation. To allow people to sit down and discuss things?

AS Yes, I would. Quite a lot of our organisations use lunch and learn, and I do it with my team. Once a month, come along, bring your lunch, we'll sit and chew the fat as they say, sit and talk about.... I will choose a topic, and then we will discuss it. Then we work our way through it, and we learn that way, we learn from each other. Another of the things we use, is just try the five minutes "CPD" (continuing professional development), at the end of every meeting. We pick a member of staff and say, it's your turn this week, what have you learned in the past week that you can share with everyone else? It's a simple technique that you can use, but it's not easy to get people started as they are often reluctant to share, simply in case they are seen as admitting to something they feel they should already have known.

SD And it's the type of thing that penetrates, you take it in, whereas in a classroom situation, you don't always take it in.

KF Has the CIPD considered corporate induction? In the Council everyone who starts has to be corporately inducted, but it doesn't seem to be happening. Do you think that this quite an important part, or should people just learn as they go along?

AS I think induction is essential. I think people have to learn the context, understand the context in which they're working. I'm not a huge believer in a front loaded induction where you've got to sit for two days and listen to what someone is saying. What you can do is use online learning for this, where you've got some information you want them to read through in advance, and at their own pace, and then follow up with question and answer sessions. It's recognising when people need to know the information. When people join an organisation; it does no harm at all to start off with the basics. This is who we are, this is what we're trying to achieve, and this is how we want to do it. This sets a tone for the culture of the organisation, and for the work place. It sets expectations for the new members of staff to why we want to be there, and to understand how it's going to be moving forward.

KF I feel that knowing a little bit of the organisation's culture would encourage them to actually be a more loyal employee, as you could fit in the current set of standards from the beginning. I wonder if that's maybe one of the problems in the retention of staff within the Council, because I think this sort of procedure has slipped, and it's just an adhoc kind of thing. But the Council doesn't seem to have the respect that it used to have as an employer.

AS There could be a number of reasons for that, and induction could be one of them. I worked through a council induction package with a student, revamping the induction. The only problem with a large organisation is getting everyone to do it singly. Not everyone has to do the same thing, so it's having someone do corporate induction, but which also can be tailored to meet the needs of everyone else. In terms of being the employer of choice, I think reputation, recruitment and retention relates in north east Scotland to the availability of higher salaries that are available in other industries. I don't think it's the reputation of the Aberdeenshire Council, or RGU that any of us are finding it difficult to get staff. I think it's

because oil companies can pay twice as much for salaries as we can afford to. Until we can show that we've got really good career opportunities, and training and development opportunities to help people develop their skills and attain the work life balance that they want, we can't compete. It's much wider than things like induction.

GO Whose responsibility should it be to ensure that new members of staff attend inductions?

AS Back to line managers. Clearly there has to be an overall view about what it is they want to do with induction. At the university we have is an initial online package that everyone works through, and it will say to ask your line manager about, so you're prompted then to speak to my team about how we work, and so on. There are lot of things that a line manager has to be responsible for, include the basic introduction to the job role, colleagues and work environment, but there also need to support the corporate role and need to make sure it is done.

JI Just an observation about the ability of an organisation in Aberdeenshire for example to retain staff. It's my understanding that when someone decides to leave, they usually do a debrief, which will include why they are going. Recent cuts in funding, which may continue in the next few years also, breeds uncertainty and when an employee is uncertain about their future, then they are more inclined to try and look somewhere else, where there may be greater security. I think this is uncertainty is a big factor in an organisation's ability, or inability, to retain staff.

AS The uncertainty is there, but one of the pieces of research that CIPD has been working on is trust in organisations. I'm going to be working with Aberdeenshire Council on trust in Aberdeenshire Council; it's something that the learning and development team have identified as being really important. Research has shown, over and over again that if your staff trust you, then you can be honest and transparent about what's happening, and you can help to sustain retention, and your turn over will be cut down. Even when times are bad you will be more likely to hang on to your staff.

JI However, how much value can be placed on the exit interviews, even if every member of staff should go through a debrief?

AS This is a difficult one, because on the whole people tell you what they want you to hear, so for example, I'm going for a better job, I'm going for a better salary, because they don't want to say, actually I'm going because my boss was an idiot. So exit interviews can be useful, especially if linked back to the metrics or benchmarking, and what the turnover is in each department. If you've got a department that's got much higher turnover than everyone else, then obviously they're not all going for a better salary. It could be something in that department, the culture.

There being no further questions, the Chair, on behalf of the Committee, thanked Mrs Stevenson for her assistance with the Committee's work.

MONDAY, 7 OCTOBER, 2013

MEETING WITH ANNE INGLIS, NHS GRAMPIAN

Present: Councillors Gillian Owen (Chair), Richard Thomson (Vice Chair), David Aitchison, Sandy Duncan, Katrina Farquhar, Jim Ingram, John Latham, Alastair Ross, Cryle Shand and Ian Tait.

In attendance: Anne Inglis (AI), Head of Organisational Development, NHS Grampian.

Ms Inglis began by stating that she worked closely with Paul Henderson (Learning and Development Manager, Aberdeenshire Council). She chaired the North East Learning Collaborative, which dealt with development jointly across the public and third sector. She advised that NHS Grampian had 14,000 employees, with the majority based at Foresterhill Hospital, in GP practices, at Dr Gray's Hospital in Elgin and in community hospitals. This was sub-divided into healthcare and support services (admin, estates, catering, etc.). She carried out Board and Executive Team development work on behalf of NHS Grampian and her remit included supporting major projects and various partnerships, digital health and leadership development.

The Corporate Leadership and Development team was small, with three staff who dealt with direct delivery, a manager and other members of staff carrying out work on specific projects, such as e-learning. The Practice and Professional Development team supported nursing, making sure that clinical skills were up to date. AI had responsibility for the equality and risk function (Datex) and maintained links with national bodies, such as NHS Education for Scotland, which dealt with medical student training. There had been a national review of induction training in the NHS and this could be used for certain additional development as well. She was responsible locally for the National Leadership Unit and was involved in Leading for the Future, which was a programme involving 135 managers from across Scotland. NHS Grampian also had access to a national mentoring register which was a useful resource for senior managers.

AI advised that there were set systems in place. AT learning was a platform for accessing e-learning and many people from the voluntary sector were dipping into this as well. The knowledge and skills framework used was known as EKSF and this was an objective setting, performance and development planning electronic system. This was a national system and staff development plans were fed into this. This information could highlight themed issues which were worth investigating. An e-learning package, known as Articulate, highlighted the 'Super Seven' which all staff had to be aware of. These were hand hygiene, fire, moving and handling, violence and aggression, IT security, adult protection and control of infection.

Induction training had been reviewed and the 'Super Seven' training was a major part of this. There was now a national standard for health care support workers and induction training had to be consistent across Scotland. Induction started as part of the recruitment process and when appointed, a corporate induction course was to be attended within the first three months of work. E-learning was an integral part of this process now as more employees had access to, and were more comfortable using, computers. Concerns that unqualified staff had no framework within which to work had been addressed and core values of integrity, confidentiality and honesty were being reinforced. Meetings with the line manager would identify a personal development plan very early on in the employee's journey. A clinical refresher course would be part of the induction training if the employee was a nurse.

There were four points on the PowerPoint scale and this related to the level of work that the employee carried out. A Nursing Assistant would probably be on levels 1 and 2, whereas a graduate nurse would be on level 3 and 4 for most duties. Nurses at that level may want to

move into a management role at some point in their career. There were also six core competencies, which were closely aligned with e-learning.

As with Aberdeenshire Council, locations could be dispersed so it was important to ensure inductions were completed, wherever the employee was based. This was the responsibility of the line manager. If employees were not attending induction training, this would be monitored and flagged up.

AI advised that all learning available was contained in the 'Learning Zone' and this also tracked and recorded what training employees had covered. There was very little corporate budget for training and the budget for development was mainly out in the sectors which required it. £5,000 was available for psychometric tests, which were utilised in the area of leadership development. AI said that the frameworks for learning had been approved but that she now had to bid for the money to implement it.

Financial plans were laid down after consideration of strategic aims and what was required to be achieved over the course of the next year. There were four sectors and above those was the Corporate Directorate. Ultimately, the Chief Executive and the Director of Finance would be held accountable for how the budget was divided up. There was correlation between learning and development and strategic priorities and this was consolidated nationally and locally. The vision statement took strategic themes and objectives into account and it was felt that every member of staff should be able to see where they fitted in to that ideal.

The Learning and Development team did a training analysis every year and this was based on what was coming through the electronic system. There was a national strategy to work to in this area. Individual development plans would also inform how this would be interpreted. National reports pointed out which areas required development, so it was a top down and bottom up approach.

There was a job specification and job description for each post and this would determine the competencies that related to the knowledge and skills framework. This then directed what training was needed for that particular post. There were six basic competencies which all staff had to have and these ranged from levels 1 to 4.

NHS Grampian worked closely with Highland and Tayside but also nationally. KSF was a national system and all boards were using it. There was a review of IT underway and there was a new HR system being put in place for the whole of NHS Scotland. This also made sense from a procurement standpoint as it would give more buying power and reduce costs. AI stated that all NHS employees received relevant training, not just medical staff, and that there were many modern apprenticeships available.

Self-directed or self-initiated study, such as advanced or post-graduate courses, could be funded if it could be demonstrated that such study was an important aspect of the employee's development. The starting point for investigation would be to try to work out what the current talent pool was like and whether staff with new skills/competencies would enhance this. Discussion with their line manager would be the starting point on this for staff and AI advised that NHS Grampian did try to support staff in this way.

AI felt that learning and development was crucial in terms of staff retention. Budgets for learning and development were always the first to be cut because that was an easy way to save money. When employees left the NHS, the most common reason given was that they did not feel supported in development, not that the levels of pay were too low (which was the commonly held belief). When these budgets were cut, it affected the motivation of staff, although it was difficult to provide hard evidence on this. There had been large numbers of staff 'poached' by Health Boards in England because they could pay more. The Scottish

Government imposed restrictions on salaries paid by NHS Scotland, so there was no room for manoeuvre in this area. Admin, secretarial and payroll staff often moved to the oil industry because higher salaries were on offer there. It was felt that those not working for a health board had little idea of how tight budgets were.

On the subject of outsourcing services, AI reported that there were greater opportunities in England for this. There was discussion on single shared services and joining up locally. There was also a project currently operating on sharing services nationally. HR and recruitment was an area which, it was felt, could possibly be dealt with on a national basis.

The merging of health and social care was a development which would have a major impact on training. Currently, there was the Joint Public Sector Development Group, which included the NHS, the Fire and Police Services and Robert Gordon's University, as well as representatives from the voluntary sector and the CBS training initiative. There was a joint leadership programme, joint middle management and a joint supervisory programme. People were encouraged to shadow each other at work. This helped in learning more about each other's roles and breaking down barriers, as it has been found that there were similar issues and problems across the public sector. Joint working helped people understand the issues, make connections and build relationships.

AI felt that it was important to trust line managers to make decisions on training and development and to initiate this at the lowest level possible. This meant that the person making these decisions was far more likely to know the employee personally and was therefore able to make an informed assessment of what sort of development would be of most benefit. This approach was also much less bureaucratic. There was a lot of development undertaken on the job and this type of informal approach worked well.

Evaluation of training was something that AI felt was very important. She advised that the NHS used the Kilpatrick levels of evaluation and that they did level 1 very well. Level 2 was about embedding knowledge and skills. Level 4 dealt with organisational development and was something that they aspired to. Feedback sheets were distributed after each course but Survey Monkey was now also used. Questionnaires were sent to staff a few weeks after their course asking them to assess how they had put their recently acquired skills into practice. It was not compulsory to return these but employees were very much encouraged to do so. Managers were trained in pre and post training discussion but due to their heavy workload trying to meet targets, this aspect of their job sometimes fell by the wayside.

THURSDAY, 10 OCTOBER, 2013

MEETING WITH ALEX STEPHEN AND TINA JONES, CORPORATE FINANCE

Present: Councillors Gillian Owen (Chair), Richard Thomson (Vice Chair), Sandy Duncan, Katrina Farquhar, Jim Ingram, Cryle Shand and Ian Tait.

In attendance: Alex Stephen, Corporate Finance Manager and Tina Jones, Principal Accountant.

AS advised that he had produced three pieces of analysis for the Committee. For the first, he had gone over each page of the budget report that was agreed at Full Council in February 2013, looking for course expenses and training. He could not, however, guarantee that this was the complete total. His second report was the actual spend. Some services would not have a budget for course expenses (so would not be separately identified) but still spent money on training. Reasons for this might include the volume not being high enough, it was part of a larger project or was funded by a budget from elsewhere. Nearly £2 million was spent on training in 2012/13 but included in that may also have been training for clients or customers and did not necessarily cover Aberdeenshire staff only. There were 15,000 transactions each year, so there may also have been coding errors where training may have been allocated to the wrong Service. The Training Unit was allocated £760,000 and this, plus the £1.9 million spent in the last financial year equated to around £2.5 million. The third sheet detailed what was actually spent with the top sixty suppliers Aberdeenshire Council deals with in relation to training.

When organising training for teachers, class cover had to be factored in to the overall cost. AS advised that his view of how these budget figures were compiled was based on what the Services needed or what they could afford. Each Service had different needs and some could rely wholly on internal training, whereas others necessarily had to access external providers to provide more specialised training. There was no formula for setting training budgets but it took into account historical demand and the needs of the Service – with an additional sum added to cover inflation. The Service Director would have a major input, as would Full Council when revenue budgets were agreed. The only Service which employed a formula was in Education, where teachers were given three days training and £110 per teaching FTE thereafter.

After examination of the three sheets of analysis provided, further explanation was given that in Education, additional money had been allocated by the Scottish Government for continuous development in schools. This was linked in with the McCrone agreement and some had possibly been used in preparing for the Curriculum for Excellence. AS was not aware of any virements being applied but suspected that there would be a transfer to, rather than from, training budgets. The corporate budget was not reflected in the figures, although part of the HR function may have been. The funds for ALDO came from the Training Unit's budget. There were five or six accounting codes which could be picked up on to try to quantify how much money was spent on training with external providers. It could sometimes be difficult to define exactly what should be classed as training, e.g. would professional development be considered training, or trips to conferences?

A considerable drop in expenditure was noted in the Education Service but AS advised that, this could have been due to funds being carried forward in previous years or budget savings. Similarly, anomalies in other areas may have been because income was coded to the wrong area.

AS had been giving training on financial regulations to schools. He had been encouraging them to contact procurement to have framework agreements set up. It was likely that schools would have similar requirements to each other and this would allow them to buy what they needed at better prices, making their budgets stretch further. Another positive outcome of this would be that they would have no concerns about complying with financial regulations.

It was difficult to keep a close eye on what sort of training was being requested. AS suggested that perhaps using HR as the first point of contact was a means of collating this. This could be a more efficient way of handling training. It could mean it would be less likely for a course to be cancelled due to lack of numbers, or someone waiting around for a long time before there was enough interest to initiate a course because requirements across the organisation as a whole could be monitored, rather than merely from each service. This could also help with identifying areas which had a high training requirement and this could possibly be offset against another which had a lesser need.

If it was found that there was a sudden change in training requirements, AS advised that this could probably be covered if necessary. If the need was there and money was available, then it could be spent to facilitate this. Training budgets in 2011/12 had been reduced from £1.8 million to £1.5 million due to savings made and this was about the time that consequences of the recession were beginning to bite. Trends were also monitored as these could have an impact on training. If there was a project which required funding but had no specific budget allocated to it, the money spent to operate this project would probably be grouped together. As an example, if the ERM project was allocated £200,000 but this was to be split into £100,000 for staff, £50,000 for training and £50,000 on IT equipment, the total would be placed as one figure under supplies and services against that project. A consolidated approach was favoured but specific amounts would still be traceable. Concerns were raised that it was not possible to know how much was spent on learning and development. AS advised that Finance did know although he could not confirm the precise expenditure.

Discussion was had on how management of budgets could be organised if there was to be a corporate management budget for training, operated through HR. AS advised that he would want to see more information on how this would work in practice, as professional accountancy training requires a knowledge of the subject area. However, that does not mean that a corporate model operated by HR would not work and there are certainly areas where HR support could improve professional training schemes. AS agreed to go away and take advice on having a corporate board holding the corporate budget and delegating to budget holders and by doing so improve the tracking of expenditure'.

The matter of induction training was raised and AS advised that he was not directly involved with this. When a new employee started in the Finance department, they

were given a working programme for the first month. This involved meeting key people, showing them the office and trying to get them up to speed as quickly as possible. The Corporate Induction scheme was compulsory, although more and more new employees were completing this via ALDO rather than face to face.

AS worked with one of the senior officers in the training unit and they met regularly. They had organised an event around working towards a team vision and how to inspire this, as well as another around Worksmart and how to make this work. Both were very valuable exercises.

Discussion was had on the financial pressures affecting local authorities across Scotland and how some seemed to be faring worse than Aberdeenshire in these times of constraint. Some were at the point of trying to reduce staff pay. Changes in legislation could often impact on ways of working and if in-house training could be accessed to provide for that, it could be the most cost effective option. If another authority had to provide the same service, another option would be to consider working jointly with them to take advantage of economies of scale. Aberdeenshire Council had bought training from the NHS, amongst others, so it was an option that could be utilised. There was also the other side of the coin, namely Aberdeenshire providing training for other partners. In this situation, it was difficult to evaluate what should be prioritised – training for our own employees as opposed to training non-Council staff with the aim of generating income.

The question of schools being able to write cheques from their school funds was raised. AS advised that this was acceptable as the Head Teacher would be a signatory but it was a grey area and one that would be looked into in the future.

MONDAY, 11 NOVEMBER, 2013

MEETING WITH PAT FLANAGAN, EIS

Present: Councillors Gillian Owen (Chair), Richard Thomson (Vice Chair), Sandy Duncan, Jim Ingram, John Latham, Alastair Ross, Cryle Shand and Ian Tait.

In attendance: Pat Flanagan (PF), EIS Joint Trade Union Secretary.

PF advised that in 2001, as part of the McCrone agreement, teachers were contractually committed to undertake 35 hours of Continuous Personal Development (CPD) per year, in addition to the five annual in-service days and 190 pupil days. The Professional Development Review Scheme (PDRS) was similar to the Employee Annual Review (EAR), which involved all non-teaching Aberdeenshire Council staff. Teachers had an annual review of development needs and discussion to agree on their use of the 35 hours CPD time to develop their career taking into account their own career aspirations in the context of local and national priorities. A more in-depth review was carried out every three years. Each year the review would consider how any training completed over that period had impacted on classroom teaching. It is important to realise that it is difficult to “measure” the impact and it is largely down to teachers perceptions. Since 2011, the Donaldson Review, or ‘Teaching Scotland’s Future’, had reinforced that quality of teaching was the most important aspect in education. This report contained fifty recommendations, with many aimed at teachers beginning their careers but also a number for more experienced teachers in terms of “lifelong learning”. As a result of the Donaldson report, the General Teaching Council (GTC) had reviewed its own standards and introduced a Standard for Career-Long Professional learning. (see <http://www.gtc.org.uk/standards/>) The GTC was to build on the PDRS and are currently piloting Professional Update – a reaccreditation scheme for teachers. The Professional Update process requires the following of teachers:

- An annual update of contact details to GTC Scotland
- Engagement in professional learning
- Self-evaluation against the appropriate GTC Scotland Professional Standard
- Discussion of this engagement and the impact of this, as part of the PRDS process
- Maintain a professional learning record and portfolio of evidence
- 5 yearly confirmation of this engagement to GTC Scotland

Although the framework for teachers to carry out CPD sat with the local authority, the onus was now more on the individual to organise this for themselves. There had been a move away from formal courses towards coaching and mentoring, online learning, teacher learning communities etc. Communities of teachers getting together to share knowledge was proving an invaluable resource. Councillors were interested in the concept of ‘learning communities’ and asked for an explanation of exactly what these were and how they operated. PF explained that these were opportunities for teachers to get together to discuss various matters (whether in person or via various forms of media). Teachers in small schools could feel isolated, so this was a means of involving them in larger groups. The same could be said for secondary teachers who taught subjects within small departments, such as music or

drama for example. Larger schools may already have a community (e.g. a Maths department in a secondary school). Teaching communities could be accessed on-line and these gave a forum for discussion and sharing best practice. It gave teachers the flexibility to access learning at any time which was suitable for them and played an important part in terms of the blend of opportunities available.

The days of having to attend a course to learn anything new were now past. An added difficulty for teachers to attend a course was that someone would have to be brought in to provide class cover and this also added to the actual costs for a teacher attending a course. Some corporate courses (on subjects such as data protection) were now offered on-line and made information more accessible. A lot of school resources were now involved in preparing for the Curriculum for Excellence and the new exams which would result from that but it was difficult to quantify exactly how many hours CPD were done by each employee. It should be at least 35 hours.

PF advised that CPD was not imposed. Teachers had regular professional discussions with their line manager on how best to develop and manage their career expectations. In broad terms, CPD could be activities such as professional reading or on-line learning. Much of it was undertaken as part of an on-going desire to keep as up to date as possible on developments in education and a large part of what was done through the working week could be classed as CPD. E-learning was valuable in that it gave a range of learning opportunities.

In terms of the personal development scheme, prior to the meeting the individual and line manager should seek to identify strengths and development needs. The employee should look at the benefits (or otherwise) of previous training and the impact it had on learning. This written evidence should be exchanged before the meeting took place, so that hopefully the starting point for discussion was a shared perception of how to proceed. Every three years, there should be a more in-depth conversation on how the employee envisaged their career progressing and to look at perhaps putting some opportunities in place to enable this to be developed. There was paperwork involved in PDRS but this should be less important than the professional discussion. At school level, particularly in secondary schools, it followed that after the discussion on training came the discussion on budget and how to meet all the demands of each teacher 35 hours CPD. The budget holder was generally the Head Teacher but this varied across schools.

Some of the larger secondary schools had a CPD committee which operated the budget for this and it often had to be managed by delivering training in a variety of different ways. If a range of schools had similar needs, this would be fed back to a central point but PF was unsure if this was to a Quality Improvement Officer (QIO) or directly to Sheila Marr, who was the QIO (CPD).

There was, as far as PF was aware, no formal process which allowed pre-planning to take place (and therefore inform how much had been already used from the budget) and Councillors asked questions on how ad-hoc requests for training were dealt with. PF advised that in his experience, requests to attend courses were more likely to be turned down because of the cost of finding replacement cover for that teacher, than that there was no money left in the budget for training. There was a

degree of capacity within the system but with the move towards teachers meeting up to learn from each other and more on-line learning, costs were considerably reduced. Meeting up with a group may only incur travel expenses and once licences were paid for, the cost was virtually nothing for e-learning. Specialised teaching (for example, support for learning) may require courses on needs such as autism but on the whole, there was a move away from attending formal courses.

IN relation to the development on new courses for CfE and particularly for the national qualifications, the EIS raised the issue of sharing resources with the Cabinet Secretary and it was advised that there would be developments at national level for each new course that would be offered as part of the Curriculum for Excellence. That had been done for all the major subjects but like any new course material, once it had been distributed to teachers, there had been significant amount of adaption or improvement at a school level... For subjects with smaller pupil numbers (such as drama or music), there was the option of requesting funding to develop a course centrally through Professional Support Groups (PSGs) and this could then be shared across schools.

PF was asked how satisfied his members in Aberdeenshire were with the level of CPD offered to them by the Council but he felt that this question was difficult to answer. He generally received feedback from EIS members when they were dissatisfied with things but on the whole, he felt that teachers were fed up with the constant changes to things like pay awards, so to try to focus in on feedback for one aspect, such as CPD, was very difficult to do. The EIS had conducted a survey of members on their confidence in delivering the new courses and National Qualifications in February of this year which indicated a large number of teachers had significant concerns. See http://www.eis.org.uk/CfE/CfE_survey_Final_results.htm

PF advised that anything which helped teaching staff to continue to meet the standards set for teaching and learning could be classed as CPD. There was a fairly broad remit from the GTCS but after-school clubs and voluntary work would only count towards this if there was a fundamental teaching aspect to it. Something unrelated could be counted as personal development but it would not be assessed as professional development. CPD could help towards promotion if through this there was evidence of the staff member leading projects or becoming involved in anything that would add experience to their role. If applying for a promoted post, it would be reasonable to assume that those on the interview panel would be looking for evidence that you have done your best to gain experience in that area.

35 hours CPD per year is a contractual minimum and. PF was clear that almost all teachers carried out more than this but that it was not always recorded. The chartered teaching qualification was an excellent professional development route for teachers who wanted to remain in the classroom and continue to deliver teaching, as not everyone in education aspired to move into management. Chartered teaching qualifications rewarded this commitment but this was not now available. PF felt this was a backward step.

Discussion was had on what might count towards CPD (and what would not). PF advised that it is important to distinguish between the minimum 35 hours contractual

CPD which is outside the contractual 35 hours working week and many things done within the week which are CPD and would be considered such by a teacher and the GTCS. For example, development of new courses for the new "CfE" qualifications would be part of the normal working week and would not count towards the 35 hours contractual CPD but certainly would in relation to the GTCS Professional update. Ultimately, the GTCS would be the arbiter of this in relation to the new Professional Update scheme... He would decide what to put forward as evidence of CPD for himself but the GTC would decide whether or not they felt it met the criteria. They were looking for evidence that you were developing your skills in relation to the GTCS Standards

The worst case scenario would be losing your registration. There are procedures for dealing with teachers who fall below the Standard for Registration – the base standard. This involves a period of support to improve to meeting the Standard but if such improvement is not forthcoming then there the teacher may lose their registration to teach. There are not many teachers who find themselves in this position. .

Running school clubs was another benefit to the school and the community and on the whole, the GTCS would take a fairly broad view and may take the view that, for example, a music teacher running a school orchestra or band is sufficiently close to a subject to be considered as CPD but the same teacher running a football club, although commendable, may not count it as CPD.. The GTC promoted social justice and community aspects, so there were no hard and fast rules and PF had seen no evidence of things being dismissed which might have proved useful. However, the main point to evidence was did the activity/piece of work improve teaching and learning in any way. In terms of operating clubs and after school activities, there were various aspects of training which were available to staff. First aid was a pre-requisite, along with risk assessments. Quite often, the person had undergone intensive training in their particular activity through whatever club or organisation they belonged to, so those costs did not fall to the Council.

PF said there was a qualification for headship which had been available for some time but that it was not a mandatory requirement. There is a new GTCS Standard for Leadership and Management. Teachers could start progressing along this path before they had a formal management position and there would be some essential management training covered in this. There was a move towards encouraging teachers to work towards a Master's Degree level and seek to have as much of a teachers training certified at Masters level. This would not prove you were a good teacher but you would certainly be a better teacher than you were when you started. It should be noted that some of the Nordic countries require all their teachers to be qualified to Masters level.

The introduction of the Curriculum for Excellence was making huge demands on schools and there was difficulty in recruiting for both permanent teaching posts and supply teaching posts. The essentials came first in difficult times, with constricted budgets to work to. PF did not think that the Aberdeenshire CPD budget had been too badly affected on the whole but if the school was understaffed, the chances of achieving the required annual CPD was less likely than at the optimum staffing level. In other areas, it had been challenging to deliver what was needed.

THURSDAY, 14 NOVEMBER, 2013

MEETING WITH DOT McLAUGHLIN, THE IMPROVEMENT SERVICE

Present: Councillors Gillian Owen (Chair), Richard Thomson (Vice Chair), Nan Cullinane, Sandy Duncan, Katrina Farquhar, Jim Ingram, Cryle Shand and Ian Tait.

In attendance: Dot McLaughlin (DM), Organisational Development Programme Manager for The Improvement Service.

DM began by saying that her role in the Improvement Service (IS) gave her an overview of Councils in Scotland and she had observed that the structure of learning and development (L&D) differed across local authorities. Dumfries and Galloway Council had recently carried out an investigation into L&D and DM advised that they would be happy to share their findings with the Scrutiny and Audit Committee. Some councils operated a centralised approach, whilst others favoured a more devolved model. A best practice model probably did not exist but Councils were trying to align L&D in support of organisational change.

DM works for the IS, which is an organisation working across local government in Scotland. COSLA are the policy and political organisation for local government and the IS advise and support councils to implement those policies on the ground. Part of her remit is to work with Councils, and increasingly, partner agencies, around how to maximise the corporate gain of L&D. She works with national agencies, such as the Scottish Government, the NHS and the Police and part of her role was to look into maximising collaborative learning. Schemes such as the National Leadership Exchange programme (where senior leaders in organisations could participate in partnering and shadowing a manager from another organisation) provided useful insights into how others worked. A major part of her work recently had been on how to support implementation of the Christie Report on the Future Delivery of Public Services. This requires a major rethink on how to deliver outcomes and how to work with communities and deal with inequalities, as well as supporting new ways of working. DM is involved in supporting 2 “place” based initiatives in Edinburgh in areas of multiple deprivation. Here they are working with communities, families and individuals who have very complex issues and therefore are involved with a number of different agencies – agencies such as Social Work, Education, the Police, Health and various community and voluntary bodies. Outcomes for families have not been improving, so they are looking at working differently with the various professionals involved and looking for much more collaborative engagement. It was found that no one professional group was necessarily the best to take the lead in every situation. What was needed was to identify the person who related best to the family and could also provide challenge, the person that the family trusted most. This person would then be nominated as the key person. The next step is to consider how to make sure that organisational structures are in place to free up the key person to support that family and the worker. This is an approach which is consistent with emerging findings from practice and research.

DM aims to collate a national overview of where people were trying to take a different approach. This is linked to improving outcomes, how to improve services for those people who need them and ultimately, understanding what kind of learning

helps to deliver in these situations. Different skills were needed in different situations, so it is important to gather those details from the people who are trying to do things differently and share that learning with other Councils and their partners.

DM also has a role in supporting workforce planning and has worked in partnership with Aberdeenshire Council on this issue in the past, supporting the development of Aberdeenshire's workforce planning toolkit. Workforce planning involves seeing what the big strategic drivers are for the Council, gauging what skills the workforce currently has and whether they are fit for future purpose taking the organisation in the right direction. Increasingly the skills people require are in working with communities, in helping those communities to take more responsibility and to identify and work with their asset base; and around prevention and early intervention. Communities are being encouraged to do more for themselves, so a different skill set is required for community involvement and development. Professionals needed to take a slightly different role and to work much more collaboratively to achieve the best outcomes.

Councils are being challenged to step up to the plate in terms of delivering the recommendations from the Christie Report but there is still a tension around delivering on the 'day job'. Extra capacity had to be built in around that. Whilst front-line staff are likely to be working collaboratively, there was more of a challenge around this for middle management. Part of the organisational change work is trying to engage with the all levels of staff in organisations to try to build a vision of how to make working differently successful. There are not necessarily specific programmes which could be brought in, rather it was about embedding support for change as close to the frontline as possible. Much of the organisational development work being carried out relates to facilitation rather than formal programmes.

DM was not entirely convinced that sending people on courses is the best way forward in delivering public service reform. Someone could attend a course and learn some very useful things but if they returned to a workplace which was quite resistant to change, that opportunity had been wasted. Learning has to be embedded in the organisation in a way which helps to change culture. An important point here is that we have to be clear what we expect L&D to deliver for us (for example better outcomes, or improved services, etc.) rather than the first concern being how it is structured. The answer to this question will, however, inform the structure which is likely to deliver for the organisation. Shared learning seems to make more of a difference. This could involve a group of staff learning about something quite concrete – something that they had to deliver on together.

Aberdeenshire bucked the trend with most Scottish local authorities as most councils were trying to reduce staff numbers but Aberdeenshire Council are having trouble recruiting and retaining staff. DM felt that it was important to connect with why people wanted to work in public service in the first place in order to keep them engaged. Sometimes they were overwhelmed with paperwork and so there was a need to help and support them in continuing to achieve what they came in to the public service to do.

The IS have budgets and organisational priorities to work to, like any other organisation. Staff have annual appraisals and could ask for additional discussions if

required. Because of the type of work the IS does, they are often invited to attend development sessions. Due to the significant amount of collaborative work they were involved in, training was often offered at no cost to the organisation. The IS itself is not primarily a training provider although it does seek to develop learning from each of its programmes which can be disseminated. It has links with Napier University, who delivered an MSc course for them. This programme was now coming to an end in this particular format.

When someone started work with the IS, there was no common induction course. The manager would decide what would be appropriate but this was not difficult as there were only around fifty staff in total. When an organisation is the size of Aberdeenshire Council, this makes individual induction courses very challenging. When a new employee starts at the IS, account would be taken of which team they are joining and at what stage of their development they are coming into the organisation, for example, the IS has quite a number of graduate entry posts. There was some learning specifically for graduates but all new starts would be taken to meetings and would 'buddy' with a more experienced colleague.

Councillors expressed surprise at the low take-up for Aberdeenshire Council induction courses but DM stated that, in her experience this was not unusual. Another aspect Councils struggled with was keeping up to date with personal appraisals / development plans. DM said that one council referred to this as contribution management, to make it explicit that this is how people are contributing to achieving the outcomes of the council. She advised that there might be policies in place but unless people believed that they mattered, they can become a paper exercise. It was not about form filling, it was about how people were valued, how to invest in them and how to improve their performance and deliver improved outcomes. When people were under pressure, they did what they had to, not what they could aspire to. Appraisals/development should not just be carried out so that if an audit was undertaken, all the paperwork would be in place to prove that it had been done. It should be carried out because it was a beneficial thing to do – for the organisation and the individual.

DM said that Aberdeenshire has very good collaborative relationships around L&D and has delivered good programmes on leadership. Community Planning Partnerships are expected to deliver positive outcomes, so there are real opportunities in this area for co-operation. Integration of health and social care was another area where it was important to share expertise and to work together. DM said that good practice was something to be shared, wherever it may be found and the IS was keen to publicise and promote that.

DM ended by noting that there was a central repository of learning materials (called A2L) which was free for all local authorities to access. The IS is also trying to encourage Councils to share what they are developing by way of eLearning and other development materials so that everyone could benefit from it. Work is currently being carried out in partnership with Falkirk Council on e-learning with a view that any programmes developed would be made available to all, in the hope that it would help to drive down costs and avoid duplication of effort.

THURSDAY, 14 NOVEMBER, 2013**MEETING WITH PAMELA BRUCE AND ALISON MACKAY, HEALTH & SAFETY**

Present: Councillors Gillian Owen (Chair), Richard Thomson (Vice Chair), Nan Cullinane, Sandy Duncan, Katrina Farquhar, Jim Ingram, John Latham, Cryle Shand and Ian Tait.

In attendance: Pamela Bruce (PB), Health and Safety Manager and Alison Mackay (AM), Team Leader (Wellbeing).

PB informed those present that she was the Health and Safety Manager and she reported to Laura Simpson, who was Head of Service (HR & OD). Health and Safety (H&S) comprised three teams, those being H&S, Wellbeing and Risk Management.

AM advised that there were three Employee Development staff who delivered training to staff in all Services throughout Aberdeenshire Council. H&S, fire warden training and first aid, as well as Driver CPC training, were offered. In one respect, this was pro-active as the unit would know from job descriptions what specific training was required to carry out the duties of that role. Training could also be identified reactively through the annual EAR, as well as from risk assessments and accidents. Primarily, training was delivered face to face.

A number of challenges had been identified within the Health and Safety Team. Part of this stemmed from Services being unable to identify what training may be required for the next year. High levels of recruitment and rapid turnover of staff also added to the problem. If a large number of front-line care staff had been recruited, they had to be trained in Object/People Handling before they could go out to work in the community. If there was a rapid turnover of staff, there would be a high level of people coming through for training. A new Senior Practitioner had recently been recruited and a major project for them was working on a training needs analysis, looking at only H&S. They were already involved in a large data gathering exercise, which was looking at how much training was sourced externally as opposed to how much was provided internally. It was proposed to co-ordinate skills matrices with each job specification/description.

PB advised that the challenge for AM's team was forward planning and this was why the additional post had been created, to look at what training was required for each Service. They might have to reassess what they wanted to deliver in order to provide what was essential. Economies of scale might be possible if they could identify what each Service was buying individually, pull all that together and look at a shared requirement. Looking at external provision may pinpoint gaps which could be filled by internal training, again making cost savings. There was a new programme to be rolled out to senior management and Councillors on health and safety and wellbeing. This was now to be delivered in-house throughout all levels of the Council, down to supervisory level.

The Team customised its health and safety training to whichever area required it. They delivered core health and safety training but if a Service required anything more specialised, they would have to find external trainers to provide it. Directives would be received from the European Parliament and through Health and Safety Regulations and these pieces of legislation would have to be adhered to. The H&S Team participated in the North of Scotland Health & Safety Group, which shared ideas on best practice and interpretation of legislation. They were also involved in the North East Joint Public Sector Group, which had a Health and Safety Sub-Group as well as a Wellbeing sub-group. Wellbeing tended to cover more personal issues, such as health, fitness and healthy eating. Wellbeing issues for management could include attendance management and supporting employees who were coping with illness. Tackling stress was another area of great concern for employees. There was an

external helpline which employees could use and it was monitored to analyse the range of concerns coming through. Although feedback was given from the helpline service, this was only given as statistics. It gave an overview of which Services used the helpline most frequently but the employee would not be identified. This information was fed back to the Occupational Health & Safety Sub-Group which then, in turn, reported to the Corporate Management Steering Group, chaired by the Chief Executive. Councillors asked if any external bodies looked at this information but the answer was no. Sometimes Freedom of Information requests were received but again, these would be generalised, asking for numbers rather than specific details.

PB advised that they had a good relationship with the Health and Safety Executive (HSE). They were able to go to them for help and advice, rather than just expect a visit when something went wrong. However, the HSE now operated a policy of charging £124 per hour where a material breach was found. This could run into many thousands of pounds if a major accident happened. This was not covered by insurance, so the Service holding the material breach would have to pay these costs. She hoped that this was not going to change the relationship Aberdeenshire Council had with the HSE, making her feel more reluctant to contact them in case a huge bill was run up.

PB spoke about there being a £28,000 Corporate Health and Safety Training budget and from that, £16,000 was committed to technical indices (databases giving access to all H&S legislation, so avoiding the need to buy publications). That left £12,000 to deliver the Health, Safety and Wellbeing Strategy. This sometimes necessitated using this money to train up H&S employees to deliver courses to other staff. The budget was very limited so the rest of the money required came from the Services themselves.

Keeping track of what training schools required could be difficult because they held their own budgets and sometimes accessed external training before coming to the H&S Team. Each Service had its own challenges. Housing & Social Work had high recruitment levels which meant that they needed to access training regularly, and often in a hurry. Waste Services would do their own manual handling training in the depots.

In terms of accident response training, working with other agencies and who would contribute to the budget, PB advised that this would be covered by Norrie Crichton's remit (Risk Manager), under emergency planning. He would make sure that training was in place so that Council staff knew what their role was as a Category 1 Responder. Simulated exercises were expensive but useful and were generally run through the Grampian Emergency Planning Unit.

A small amount of income was generated through providing driver training for Aberdeen City Council, AM advised, but the resources were not there to expand that any further. Smaller, private sector companies could also potentially have tapped in to this training but that capacity was not available.

Once training matrices had been put in place, it would be easier to keep track of specific related training for each post. It would be an ongoing process of staying in touch with those who were keeping us informed of developments. This would ensure that the system was as up to date as it could be. Changes could be legislative or process driven but had to be taken into account so that the H&S Team were delivering what was needed.

PB advised that the H&S Team would keep an eye on risk assessments for activities such as school pupils going on trips outside of school. Audits on schools would be carried out regularly and this would take into account risk assessments, policies and procedures and the culture of the organisation.

There was not a large amount of e-learning in the H&S Team currently but this was something which was being looked into. Manual workers did not always have access to computers and as many H&S courses were very practical, it was considered more appropriate to have face to face training. It was important to know that everyone understood what they were being trained on. In terms of first aid, the HSE have said that an SQA qualification was now what they would recommend. The Team carry out risk assessments to determine what level of first aid training was needed in all areas of Council operation. There was a three day course which was delivered every three years. This course would be organised to cover areas operating heavy machinery, working with chemicals or where staff were far away from a hospital. Here, more in-depth knowledge would be required. For most areas, a one day emergency first aid course was all that was required and this was basically to deliver the knowledge to keep someone alive until the ambulance arrived.

There had been changes to regulations covering driver training and this could have been a potential problem for voluntary organisations. This had been investigated and it had been confirmed that MIDAS was still acceptable for voluntary drivers, so avoiding extra expense in additional training costs.

18 NOVEMBER 2013

ALISON MACKENZIE AND JENN ASKILDSEN, CORPORATE SERVICES

Present: Cllrs G Owen (Chairman); R Thomson (Vice Chair), N Cullinane, S Duncan, K Farquhar, J Ingram, J Latham, C Shand, and I Tait.

Apologies: M Watt.

Officers: Alison Mackenzie, (ICT Service Development Specialist) and Jenn Askildsen, (Support Services Team Leader, Corporate Services).

Cllr Owen, on behalf of the Committee, welcomed Mrs Mackenzie and Mrs Askildsen to the meeting, which was to hear about the production of the new Corporate Services Employee Handbook and Induction Guide.

AM A group was created of representatives across the different sections Corporate Services, to produce a Corporate Services Induction Pack. The motivator had come from the How Good Is Our Council work which had identified variations in the reported indicators, both across, and within, the services. Some were more successful at employee induction than others and there was a great concern about the patchy up-take of Corporate Induction training. Each Service Improvement Board had been remitted to review, for improvement, the induction process. Within Corporate Services, a representative from each section had participated, looking at what was already in place and working to produce a programme of good practice which would remove inconsistencies. While there was evidence of good practice, this was found to be not always followed. From existing structures and practices, the team had updated the procedures and filled the gaps. Cross section team had worked well together, bringing their skills and experiences from their specialist areas of IT, Finance, and HR. In carrying out the work, other issues in terms of corporate consistency had been identified and set aside for future consideration.

JA The new programme was very clear and concise, and there is a 3 minute video on Arcadia where the Director and Heads of Service introduce themselves and welcome new employees to the Council. This complements the checklist for managers and the employee handbook, both also available on Arcadia. The process should begin before the employee start date – i.e. once appointed the managers should have a conversation with the new start about what would happen and the expected timescale. The checklist listed what should happen on week one, to week four and listed the information to be discussed at various points. Some were more time critical than others, but the checklist suggested how the essential work might be programmed and managed better. The idea was to help structure the guidance on telling what was needed at the time it was needed to be known, and give the employee time to absorb the necessary information.

JA The Handbook was felt to be a really useful thing to have as a reference source for the employee, containing information such as which day of the month salaries were paid, links to HR policies, and the Council's ICT policies and procedures. In reality, this gathering of information was useful during the whole life of the employee, not just on new start. The accompanying video clip was still under development, but would encompass a brief introduction to Corporate Services by the

Leadership Team, including who's who in Woodhill House – those in outlying offices did not see their Director or Head of Services in the flesh frequently.

The new programme had been launched on 7 October, 2013, having been approved by the Corporate Services Leadership Team. All the information had been lodged on Arcadia at a central point, with all line managers sent a link to the appropriate pages for both the induction checklist and the employee handbook. In the first month, there had already been some very positive feedback comments, including one from a new start in ICT, who, having worked in a range of private and public service jobs, declared it to be “the best I've ever had.”

We're aware it's not perfect and plan to survey employees and managers in March 2014. Any agreed changes will be taken on-board and the document republished, thereafter to be subject to annual review.

AM This review will be undertaken by the same coordinating group.

GO The matter of corporate induction was raised in Internal Audit report in March and it's a matter of concern for members. I'm aware there a lot of reasons for non-attendance but would like to see an early internal audit update reporting an increase to 85/90/95%.

JA We'd hope that the checklist and handbook make it easier to remember and programme necessary steps within a reasonable timetable- they also embed a schedule of expectation on both sides about when things should happen.

AM Without the checklist, there are less options to remember – it's a good trigger for the managers. We'd hope to maximise participation in corporate induction within the next six months.

GO The check list will also allow the employee to put the question; “Shouldn't I have had/ been” It looks very impressive – and the type of thing an organisation of this size should be expected to have.

CS Can the induction list be customised to suit the different services/ sections etc.?

AM This one deals with Corporate Services only and covers a number of different skills and professions, so the template is a standard induction for everyone. Underneath this, there may be specialist induction plans for specific sectors – but this won't water down the overall principles which apply to all jobs and levels.

JA We tried to establish a base line of what we all needed.

JI I'm impressed by the document – but feel it's important that people get the chance to read it before starting work. Do managers meet their new starts to see how best to move forward? I used to do that with my new starts, but I'm aware it can be difficult to arrange/ schedule. Will you be able to check up on this?

AM All new starts will get it – and the Senior Management Team are encouraging the services to make sure each line manager ensures that their staff do induction. It will be recorded on employee records but it's very much down to the line manager to

ensure it happens – and happens at an appropriate time. In my own section, there are a lot of new employees and so the issue is quite high profile, with people talking about induction etc. – this type of activity can highlight where there are issues and things not being done the same across a group of staff.

JL Does this operate on two levels? I'm thinking a basic introduction to the council, and then job specific information?

AM The work plans what should happen in Week one, week 2, week 4 in discussion with the employee.

JA The check list also stresses to the managers the need to have a plan for day one, what will you get your new start to do on the first day. The manager may use the handbook as a start off point for discussion with the new employee – it's a trigger to have the necessary discussions.

GO It also covers things like booking a desk – if it's a flexible working environment – so the new start has a place to sit on day one?

JL I started with this Council 30 years ago and over time attended a lot of courses – such as how to answer the phone. I feel this publication is very impressive. I note the reference to Financial Regulations in the document and welcome this as an area where there will be an increasing emphasis in the future.

AM There's also training on financial awareness available too.

JA The idea was to flag up to a new employee and reiterate to the line managers that we all call for or order stationary, for example, and need initially to flag up the responsibilities around purchasing etc.

KF It looks great – but will it be delivered equably to part-time workers – e.g. in landscape services or seasonal workers?

AM All employees will get the same. In corporate services we have a number of Part time workers and they won't get a lesser version. For seasonal workers, the range of information covered might be reduced.

KF I guess it's easier for those staff based in Woodhill House?

AM The project team considered a watered down version for temporary staff – but concluded that this wasn't appropriate. All staff should be treated the same even if only there for three months.

JM For clarification, what you have before you relates solely to Corporate Services – as Alison said before, each service improvement board was given the remit to do this for their own service. Corporate Services is the first to produce.

JL Does the book give information on snow days?

JA The handbook has hyperlinks to the appropriate policies – and the line managers will email a reminder should the situation apply. The benefit of an online version, as opposed to hard copy, is that it can be kept updated. Other policies may change too often and it's hard to include the relevant information – we used the standard text for the definitive information that's not likely to change, with links to the more expansive information which may change.

AM There's a reference to the formal bad weather policy under special leave.

SD I'm not surprised it's been well received – is all the information new?

AM It's not new at all, just pulled together for the first time from a variety of sources. But not everyone had access before to a staff handbook, those that were in existence were often out of date and this now is very relevant to all of us. It's there as a reference. Some aspects will be relevant across all the services of the Council, but its intention was to be for Corporate Services staff.

KF But it could be used as a template for other services too?

AM Yes –we believe its contents are very relevant across all Aberdeenshire staff. Within our service, we're going to work on function specific aspects to sit underneath the overall information.

JA If other services were to use our document as a basis, all that would need to be changed would be Chapter 3 which is specific to Corporate Services – the rest is general.

It was agreed that copy of the follow-up survey on the new handbook and induction guide (to be undertaken in March, 2014, be reported back to the Scrutiny and Audit Committee for their information.

There being no further questions, Cllr Owen, on behalf of the Committee, thanked Mrs Mackenzie and Mrs Askildsen for their informative session and the meeting closed.

MONDAY, 18 NOVEMBER, 2013

MEETING WITH FIFE COUNCIL

Present: Councillors Gillian Owen (Chair), Richard Thomson (Vice Chair), Nan Cullinane, Sandy Duncan, Katrina Farquhar, Jim Ingram, John Latham and Ian Tait.

In attendance: Maureen Ward (MW), Workforce Development Team and Roy Lawrence (RL), Team Manager, Workforce Planning and Development (Social Work).

MW advised that RL's role was workforce development for Social Work and that Education had a similar model. These were the two directorates which operated the majority of the Council spend. Her role was to cover workforce development in an HR capacity. Fife Council had a workforce of around 18,000 to 19,000 personnel. They had a framework agreement with 22 providers, giving face to face as well as on-line training. Health and safety training was provided internally and checks and assessments were carried out. There were pockets across the organisation responsible for Learning and Development (L&D). Most of the budget was devolved to the directorates, with some of that being assigned to Team Leaders and leaving them to decide how best to operate this allocation.

RL stated that he held the budget for his area of Social Work and that this was tied in with the operational budget. He managed a team of nineteen staff.

In answer to a question from Councillors, MW advised that in Fife, they did not run corporate induction courses. They provided checklists which were accessed through their intranet and the individual was expected to do this at a local level. Group inductions were organised where staff turnover was high (such as in cleaning and catering). Also, because many vacancies were advertised internally, a full induction was not necessary for the successful applicant. The responsibility sat with the line manager and the employee to work their way through the checklist when the employee started. They can then focus on which areas should be targeted, rather than leaving the employee to wade through it on their own. She advised that she could forward a copy of the checklist if this might be of use.

The 22 providers previously mentioned had replaced a mix of internal and external trainers. The training team now only had four members and their role was co-ordinating, as opposed to delivering, training. Those leaving the team had not been replaced and Fife Council now commissioned all training. This had delivered distinct advantages. Those companies used were front runners in their field and were able to offer up a wealth of experience. They were also up to date on what was happening outside the Council. Fife Council also used ACAS, which was a widely recognised body. On-line courses could be delivered for free and overall, using external providers had brought costs down. Satisfaction levels on courses were high (80-90%) and MW could not pinpoint any obvious disadvantages. The plan was not to operate outside this framework and to guide all employees to adhere to this.

There was no process of checking how much was spent departmentally on L&D and therefore no way to ensure that it was adequately provided for in budgets. MW

advised that what the Council spent as a whole could be monitored but because budgets had been devolved to departments to spend as they saw fit, it was more difficult to drill this down. In 2011/12, Fife Council spent around £4 million on L&D as a whole, from an overall budget of around £800 million. This took into account hire of venues and trainers, as well as access to qualification programmes and staff attending colleges, etc. on day release programmes and such like.

RL started in his post a year ago and part of his remit was to change the way they scoped L&D and engaged in an operational sense for Social Work. He looked for gaps in training. To pinpoint these, he set up workforce planning forums to consult with employees and managers. There had been a 50% reduction in the commissioning budget and a reduction in staffing levels of around 30%. That being the case, it was important to ensure that money was used for service priorities and to make sure that their first five or six priorities were managed well. The action plan had L&D requirements incorporated into it. RL advised that he could provide a copy of this to the Committee if they felt it would be useful.

Fife Council operated a range of different procedures as an equivalent to Aberdeenshire Council's Employee Annual Review (EAR). Contribution Management involved the individual agreeing their role with their line manager for the coming year and there would be a six month review of that. In other areas there were team review processes, looking at team goals rather than individual ones. There was no one performance appraisal approach for all employees but everyone had access to discussion on their own L&D. If a member of staff was not involved in a full performance appraisal, they would, at the very least, have access to an Employee Development Review. This was an assessment of their training requirements but this was obviously subject to budget priorities. Much of this could be done on-line, so lack of funds was not an issue on e-learning.

Fife Council had a contract with Learning Nexus to provide access to e-learning and this encompassed generic and purpose-built courses. Some had been developed in conjunction with the NHS, such as one on child protection. £23,000 per annum was spent in this area and there were around 1,200 regular users of e-learning. E-learning was not at the forefront of Fife Council's operation but it was expected that this would develop more and more in the future. They were in the process of launching an on-line resource through a company called Good Practice and this gave access to 'just-in-time' learning. This would probably go live in January or February and would give managers hints and tips for specific situations. If a manager had to initiate a difficult conversation for example, they could access this resource and would be able to view videos, checklists and good practice guides (amongst other items) which would enable them to carry it through successfully.

Fife Council made their appraisal process service specific and they aimed to integrate the training identified with the various assessments to this. MW felt that there was a trade-off between generic training and those with very specific requirements. On the whole, courses were generic. If employees required training on managing absence, then ACAS would be called upon to deliver that but there was the added safeguard that managers could approach HR for specific advice on various subjects. Service priorities took precedence over an individual's desire for training in a particular area but the employee would always be given the reason as to why their request was not progressed at that time.

Aberdeenshire had trouble with recruitment and retention of staff due to the cash rich private sector. The Council was unable to compete with oil companies in terms of the salaries they could offer staff. Councillors asked if L&D could prove to play an important part in retention of staff. MW advised that several years ago, Fife Council had similar problems in employing trained social work staff. To alleviate this problem, they invested in training eight members of staff to become social workers. Fife Council had invested heavily in that training but in return, expected those employees to remain with the Council for a specific length of time. Fife Council invested in helping staff to become professionally qualified but training was a challenge in times of budget restraints. It was all too easy to trim the L&D budget when savings had to be made although long term, this was not a wise move.

In conclusion, MW advised that she could look for figures to provide to the Committee on how each directorate spent their allotted budget on L&D, if that would be helpful.

WEDNESDAY, 20 NOVEMBER, 2013

MEETING WITH KAREN MEARS AND EUAN PROUDFOOT, WELLBEING

Present: Councillors Gillian Owen (Chair), Richard Thomson (Vice Chair), Nan Cullinane, Sandy Duncan, Cryle Shand and Ian Tait.

In attendance: Karen Mears, Team Leader (Policy) (KM) and Euan Proudfoot, Team Leader (Workforce Strategy) (EP), both HR&OD.

KM advised that her team was responsible for reviewing and developing all HR policies, of which there were around 40. The Policy Team were also currently launching "Policies in Practice" which would provide support for managers/supervisors in terms of the practical application of the HR policies. This support would help to develop the general management skills and knowledge required to apply the policies and procedures effectively. For example, on attendance management, return to work interviews, disciplinary investigations etc. This could be delivered through individual sessions with managers, by attending team meetings or simply by preparing guidance notes. Operational HR officers have a wealth of experience in dealing with these matters, so it was felt this approach would be beneficial. A survey was being launched for line managers to provide feedback on the required support along with the development of a 'Policies in Practice' leaflet which detailed the new service. A roadshow was also being undertaken to enable the team to gather feedback from employees across all Aberdeenshire areas.

EP stated that there were two main strands to his remit which related to L&D. These were the review of the EAR scheme and the development of the competency framework. The uptake on the EAR was generally quite low across services. The last review had been undertaken in 2011 and at that point, uptake in H&SW was 31%, IS was 36%, ELL (non-teaching) was 15%, CS was 43% and CE was 100%. Work was done in 2011 to try to pinpoint the major challenges and three main factors were identified. These were a) the volume of EARs that line managers were requested to undertake (some frontline managers had as many as 100 to do), b) limited opportunities to meet with staff (many staff are part-time, some working as little as 35-45 mins per day) and c) the paperwork (there is a single scheme applying to all non-teaching staff which currently does not seem to be fit for purpose). EP suggested that possibly having different paperwork for different staff groups might be a way forward. This may make the process more valuable for the manager and employee. The perception was that the EAR was something that was completed because it had to be, not because it was a worthwhile process. It needed to be made useful. Each individual should exit the process with a personal development plan, which should then inform the service plan and the corporate development plan. This rarely seemed to happen.

As part of the review, a survey was undertaken last year which was targeted at frontline managers and it asked for their views on the current system. The main difficulties highlighted were the relevance of the scheme, the time taken to carry out reviews, the paperwork involved and the limited contact time that managers had with staff. There was concern that the current scheme lacked credibility in that individuals

were asked to identify training needs as part of the EAR process but very often, those training needs were not met. This could be due to a number of reasons, such as expectations being at too high a level in respect of what the service is able to provide, restrictions on budgets and the information being fed back to EAR coordinators not being in a format which was easy to analyse. The intention was to complete this review by June 2014.

EP advised that the team had contacted Councils across Scotland to better identify best practice. Twenty private sectors companies had also been contacted to ascertain how their performance appraisal schemes operated. These twenty companies were identified by the Sunday Times as the best companies to work for in 2013. A pilot scheme was being progressed with cleaning services, as this was one area where EARs had not been undertaken. The main reason for this was that there were four area supervisors responsible for approximately 800 cleaners. This obviously meant that each area supervisor had 200 EARs to carry out and this was just not practicable. As a result, very little information had been gathered on the training needs of this group of staff. Because of the numbers involved, it was difficult to schedule 1:1 meetings, so through this pilot scheme, a different approach was being considered. Employees were being asked to complete a self-evaluation EAR in the form of a questionnaire and this would focus on five main areas. These were a) the duties they undertake, b) the relationships they have within the service and with their clients, c) the training needs they may have, d) linkage with the competencies associated with their role and e) to identify those employees who wished to develop their careers. Replies to these questionnaires will be collated and analysed by the workforce strategy team and a report will then be submitted to the cleaning services management team. EP advised that the workforce strategy team would be looking to learn lessons arising from this pilot scheme and also to take account of any useful information gathered from liaising with other Councils and private sector companies.

EP moved on to talk about the competency framework which had been introduced at the beginning of 2011. This looked at the attitudes and behaviours that the Council wanted their employees to demonstrate when undertaking their duties rather than what they do when performing their roles. This was developed by looking at best practice in private and public sector organisations. A lot of valuable work had been done by the Local Government Association of England and Wales and some important lessons had been learned from some schemes already in operation in other Scottish local authorities. The framework had three main themes, namely a) it should inform prospective recruits to the Council what behaviours and attitudes would be expected of them, should they be offered a post, b) should inform existing employees of what behaviours and attitudes were expected of them when carrying out their duties and c) should inform staff of how they should be treated by their line manager. They are looking to embed the competency framework in the EAR process, as well as in the recruitment process. The competency framework formed part of the assessment process and the personality pacing aspect of that. EP advised that they were looking to cascade that down through more levels of the organisation. They were also looking to take forward a corporate succession planning programme (Future Leaders Programme) in the near future, as part of that process was identifying those behaviours in those destined to work at a higher level. The competency framework would be factored into this programme as well.

The Future Leaders Programme (FLP) would initially be targeted at team leader to team manager level and service manager progressing to senior management level, e.g. Head of Service. Managers would be asked to identify those they think would be suitable candidates. The employee would be given the opportunity to apply to join the programme and go through the application process. There would be an assessment centre process and a panel (consisting of service reps) would then assess which applicants had shown the greatest potential to take on a higher graded post. The programme needed commitment from the services to make opportunities available. Individuals on the scheme would still have to apply for vacancies and go through the same interview process as any other candidate but hopefully, they would be able to demonstrate that they had the necessary skills, aptitudes and experience to be successful in those higher graded posts. This should potentially help retention levels, as those on the FLP would stay with the Council in anticipation of finding a higher level position.

The pilot project had been targeted at that particular level because it was known that there were likely to be changes in years to come which would mean a shortfall of managers in that area. It was hoped to cascade the opportunity to join the FLP further down the organisation in time, so that more employees could benefit from this scheme. The scheme had to be seen to be robust and transparent to mitigate potential resentment or resistance from other employees. Everyone would be made aware of what the process entailed and what an individual had to demonstrate in order to be accepted on to the programme. Feedback would be given to those who were unsuccessful in their application. It was likely there would be those who would be disgruntled but if the process was transparent, there was no reason for concern. EP advised that at the moment, there was no tie-in to any generic management qualification through the FLP but that once the scheme was up and running, they may revisit the subject and look to have it accredited. KM noted that this could prove to be a useful recruitment tool.

On corporate induction, KM advised that new employees should be directed into the induction process much earlier than often happens. It could often take months, which was far too long. EP felt that an EAR should be initiated early on in the induction process because this would be a good point at which to identify development needs. There was a clear linkage between having a very strong and robust induction process and for that process to involve an initial appraisal of the individual. It should be integrated into one.

EP did not think there was a clear linkage between an employee's performance and the EAR process. The balance was not right. The EAR reviewed the employee's workload for that year, looked at what the main tasks would be in the following year and then training requirements were a bolt-on at the end. If that was all an EAR was, a 1:1 with your line manager would be sufficient. The EAR should be an opportunity to discuss your career aspirations and what training would be pertinent to that, as well as your attitudes and behaviours. It should not be a chat about your workload, as this should be monitored on an ongoing basis. It was important to identify the 'high flyers' in the organisation so that they could be equipped with the necessary skills and experience to take on new posts as they became available. Aberdeenshire Council had made a commitment to introduce succession planning, so line managers and employees had to buy in to this to make it a success.

One of the challenges faced was explaining to individuals how competencies work in practice and it may be true to say that most employees did not know where to find the competencies for their post. They were all on Arcadia but not all employees had access to that. EP was surprised that the competency framework had only been introduced in the last couple of years but that was not the end of the process. It gave a starting point for building on that framework and ensuring that every employee knew what was expected of them.

KM advised that her team would help enable managers to acquire the skills and confidence to effectively undertake the procedures contained within the HR policies.

WEDNESDAY, 20 NOVEMBER, 2013

MEETING WITH INEZ TEECE, UNISON

Present: Councillors Gillian Owen (Chair), Richard Thomson (Vice Chair), Nan Cullinane, Sandy Duncan, Cryle Shand and Ian Tait.

In attendance: Inez Teece (IT), Assistant Branch Secretary, UNISON.

Speaking on behalf of UNISON, IT advised that there had been significant changes in Learning and Development (L&D) over the years and that there had been a move towards on-line learning. On the whole, this was a good thing but it could not be assumed that everyone had access to a computer. Trying to find time to fit in training around the day job proved difficult for some employees. The opportunities e-learning afforded were increasing but there was an issue for those employees who were not office based. They may not have access to dedicated computers or passwords to access e-learning. Teaching support staff in schools had regular in-service days but otherwise, they would have to study at home. Training could be intermittent, as hours were full in employees' day jobs. People were constantly juggling the various parts of their lives and IT wanted people to be paid for what they did.

IT advised that she worked in adult basic education. One in four people in Scotland had difficulties with literacy and there were partnership agreements with various organisations. There was a course called Preparation for Study Skills which was of great benefit because returning to learning after many years away could be daunting. She was trying to prepare the workforce for new ways of working. More and more people now had to keep records, so there was a pressing need to be able to read and write. In previous times, people could carry out their duties perfectly well without necessarily having to keep paperwork up to date.

She was very pleased to see the scheme that Aberdeenshire had initiated to encourage employees to study to become teachers. Aberdeenshire Council had also entered into a partnership with Stow College in Glasgow for various courses. Significant steps had been made but there were still people who were hard to reach. With budget restrictions, there was more and more expectation that employees should study in their own time.

When a literacy need was identified, counsellors would become involved and would deal sympathetically with that. 'Return to Learn' was a course which aimed to prepare people to take up a course of study. This was a ten week course, with employees attending for an hour a week. Generally, people were unwilling to admit that they had literacy problems because they feared for their jobs. IT gave, as an example, the situation of a home carer who had to make a note of what was done when she visited clients. Although she had difficulties with literacy, she managed to get through by writing the same thing every time. She was a carer who was very good at her job, so once her difficulties were uncovered, she was given help and this had enabled her to move on. Managers may not know what to do when they found out that an employee had literacy difficulties but they could seek help. This applied to those whose first language was not English, as well as those with difficulties such

as dyslexia. Dyslexia can be a big issue but the Council will help out once this has been identified. Special filters could be supplied to help with out with this but other aids and techniques were also available. Help was readily available in schools but for others, there was a definite gap. There were a lot of people in the north of Aberdeenshire whose first language was not English, so this was situation which necessitated some input at various times as well. There were so many employees in Aberdeenshire who were not on the network, it was difficult to communicate effectively with them all.

IT advised that she felt new employees should have everything they needed to do the job as soon as possible after they started and that the Council should have systems in place to do this. In a previous session, Councillors had been given information on changes to Corporate Services induction and the Employees Handbook but they realised that this worked well for those who were office based. For employees in remote locations, these changes meant very little. IT said that home carers had to complete a training package before they started on the job. In other services, it was probable that employees would have to wait for training until enough people were available to make courses viable. It was often the case that training courses were over or under subscribed, so that made it difficult to balance the needs of the organisation with those of the individual employee. The need for refresher courses for various aspects of a person's job was another thing which has to be factored in and very often, these were time sensitive.

It was now becoming the norm that employees were expected to achieve certain qualifications to remain in their jobs. The HNC / SVQ qualifications in care were of the type in question. In the past, you would try to achieve a higher qualification to allow you to progress to a higher level in the organisation but that was no longer the case. IT noted that if this was essential for the service and to comply with legislation, then the Council should support the employee to carry that out during work time. If it was for the employee's own development, then perhaps it was acceptable to expect that they would carry it out in their own time. Aberdeenshire Council was finding difficulty recruiting teachers, so new opportunities had been made available for those who were keen to retrain - as in the scheme which had recently been made available to those already with a degree who were working in education (such as Pupil Support Assistants). These schemes were a two-way process as the Council was putting resources into an area of need and the employee was benefiting from the support given. It was a mutually beneficial arrangement. It was likely that the Council would expect a minimum term of two years' service after the retraining had been completed.

IT noted that her view of the EAR process was that it would be a good scheme if it was properly done and acted upon. The problem was that managers often did not have the time to do it but that once it had been carried out, it was not acted upon. It was often just a paper exercise. It could be used as a skills audit, to list the expertise available to the Council to call upon. These skills could then be nurtured and developed to the advantage of both the Council and the individual. She felt that there could be a direct link between the EAR and the competency framework but that not all employees carrying out EARs on other individuals were aware of this framework. Comparing peers, or colleague against colleague, was not advisable but she suggested a median line of expectation on a competency could be acceptable.

In her years as a trades union official, IT advised that she had never come across anyone who, when told that they were not performing well, agreed with that assessment. She did not offer an opinion on whether that was right or wrong but was interested in the background to these situations. Sometimes there was a poor personal relationship between employee and manager, or the manager was not aware of the person's capabilities or limitations. She had to represent the person who had approached her for help and sometimes, they were in need of a reality check. If the EAR system was functioning properly, these problems could potentially be avoided because it would all be catalogued. If someone was allocated a space on a course, it may mean they were not operating in their role particularly well. Following on from that situation, there should be a feedback process involving the individual, the manager and the trainer, so that awareness was heightened. It was important to make sure that these new skills could be put into practice.

Discussing the number of EARs a manager might have to carry out, IT advised that if this had been a problem five years ago, then she would have said that time would have to be allocated to this, as well as to the follow up process. This was not possible in the current economic climate, where every minute of an employee's time was accounted for. Employees were pushed to the edge of what was possible within the hours allocated. IT was asked if she felt that having a person in each department dedicated to the EAR process would help make it a better system? She doubted if that was the answer. In carrying out an EAR, you had to know the person and know what sort of role they were carrying out. However, having someone to oversee the programme and make sure that the requirements were acted upon might make a difference.

IT advised that the unions were not experts on L&D but were aware of what was going on. They would contribute as they saw fit or as appropriate. If there was something amiss, they would make their thoughts known. There was the opportunity to speak formally or informally through the system, whichever was felt most appropriate. In response to a question on issues with a line manager perhaps preventing an individual from progressing further in the organisation, IT replied that she had two perspectives. When replying as a Council employee, she recognised that there were rules and guidelines which had to be adhered to. Speaking as a Union representative, if she felt that the employee was being bullied, overlooked or not supported, for example, she would become involved and try to resolve the issue. She would deal with that as informally as possible in the first instance but if this did not resolve the issue, there were other, more formal routes which could be taken.

20 NOVEMBER, 2013

SHEILA MARR, QUALITY IMPROVEMENT OFFICER, (CPD), EDUCATION, LEARNING AND LEISURE

Present: Cllrs G Owen (Chairman); R Thomson (Vice Chair), N Cullinane, S Duncan, J Ingram, and C Shand.

Apologies: I Tait, K Farquhar and M Watt.

Officers: Sheila Marr, Quality Improvement Officer (CPD), Education, Learning and Leisure.

Cllr Owen, on behalf of the Committee, welcomed Sheila Marr, Quality Improvement Office, Education, Learning and Leisure to the meeting and invited her to speak on her experience of learning and development within Education, Learning and Leisure.

SM I'll give you a very brief background of what my responsibilities are in terms of CPD. I'm responsible for Continuous Professional Development across the EL & L Service. This is not only looking at learning and development for all staff, teaching and non-teaching, but also responsible for career development and learning of students coming from Universities as probationers. I also coordinate leadership development opportunities for senior staff and managers. This is in addition to my core role responsibilities to a geographical network as a quality improvement officer.

Within EL & L, we have specific budgets for learning and development. Some are held centrally but a lot is devolved directly to our establishments. This includes a number of funding streams that are provided specifically to meet national priorities. For example these include "opportunities for all", "the early years' assessments", and leadership and induction for newly qualified teachers. Some training recurs annually. We manage these in terms of the recently approved Learning and Leisure policy which outlines an indicative plan for the budget allocations to meet both national priorities and meet local needs. Officers within the service to produce action plans, which outline in detail what professional learning they are going to deliver. The action plans show a clear break down of what budgets would be required to deliver that particular stream of professional learning, normally within a single year but sometimes on a three year rolling programme. The indicative plan is shared with everyone in the service.

We have a CPD steering group which has representation from across the service, teaching and non-teaching and Paul Henderson, the Learning and Development Manager from Learning and Development also sits as a member. This is extremely useful in terms of not only by creating a better understanding of the Service's learning and development needs, but also it helps us to facilitate and co-ordinate commissioning to help joint delivery of certain aspects of professional learning. We are looking at delivering more of our professional learning on-line to ALDO, with the support of corporate learning and development colleagues.

Where we externally commission people to deliver our CPD, we look for a level of expertise that is not present amongst our own staff. This might relate to national priorities, but in general we are trying to make use of our staff as cascade trainers,

building up their knowledge and skills. As an example, we have been providing active literacy training to a whole range of schools. Using staff trained to deliver the programme, this is achieved with the sole cost being staff time.

In terms of thinking about the improvements that could be made to commissioning, ELL are very clear where we do use external providers that there is a robust valuation and a measuring of the impact that they have had on our staff, and, in turn, within the EL & L Service the impact that is having on our young people. We also work very closely with Education Scotland and the General Teaching Council for Scotland when commissioning– the cost there intend to be limited to their travel costs because they would not be charging us. We also work very closely with the Universities across Scotland who provide teacher education to provide support for staff who are delivering or supporting students. That is also at a negative cost, but there are other areas of major cost where we commit to the continued learning of our staff – for example, some staff might be identified as benefitting from undertaking a masters level course, particularly around leadership development.

We also look to direct training resources towards achieving the 50 recommendations in the Teaching Scotland's "Future report". We were delighted to be able to host a joint conference with Aberdeen City recently where the author of the report, Graeme Donaldson, delivered the key note speech. Other national figures came and spoke to our head teachers to support them in the future delivery of the recommendations contained within that report.

The General Teaching Council for Scotland has produced a new system where all teachers, or all registered staff in the General Teaching Council, require an annual, and a five yearly, update demonstrating that they have maintained the standards that would require of our teaching staff. Aberdeenshire agreed to be part of pilot in this, its second year, with the Laurencekirk and Meldrum networks taking part. In this way we can help inform the final decisions that are made for the national framework. A panel from the General Teaching Council are coming up to scrutinise our preparation for this, as from August 2014 all our staff will be part of this framework. Contained within this framework is a range of new standards on which our teachers will have to focus in terms of skills and self-evaluation. These are standards that range from early career to career long learning, and newly produced standards for leadership in our head teacher. There is a great deal to focus on to ensure that we are getting value for money.

Where we are proposing to spend a considerable amount on professional learning, over a programme of a few years, we do this through the appropriate tendering procurement process. We have recently done that with a national provider called Tapestry who are going to provide some excellent support for some of our Schools. Our learning policy framework clearly outlines what we expect from both external providers and our own staff, in terms of evaluating the impact of any learning delivered. The EL & L CPD steering group are currently reviewing how we measure impact and evaluate our professional learning and how we are going to take this forward to meet the needs. In terms of our PDRS policy for teachers, this requires their self-evaluation of the anticipated outcome and impact of any professional learning that they may undertake. We would expect this to be part of the regular review conversations with their line manager.

In terms of other Councils and how they are managing their learning and development, I have regular contact with officers from other authorities undertaking a similar role. We not only to share good practice but also to support each other in terms of the way that we take forward national documents. I also sit on the National Early Phase Group – this is beneficial to Aberdeenshire in terms of being able to put forward the views of the service. Again, we support links with the professional bodies such as the General Teaching Council through regular contact and I am responsible for maintaining regular links with them and Education Scotland. We are looking at how we use these connections to improve those levels of review meetings as part of our quality improvement team visits to Schools.

GO I'm curious about the allocation of training time for teachers within the term time. I know that teachers have lots of training to do. Are their contracts for 12 month period? It seems that concentrating training during term time puts still more pressure on getting supply teachers to cover the teacher, whilst there are six weeks during August and July where no teaching takes place. Could we perhaps allocate one week of the six week holiday for the pursuit of the various training aspects, to get the teachers trained without actually having to effect the normal school day when they get back to school?

SM That was actually looked at in terms of the national terms and conditions agreement. The Scottish General Council for Teachers, the national body of teaching unions and so on involved blocked the proposal that a week during the vacation should be looked at in terms of professional learning. Instead it was agreed that the 35 hours additional CPD individual learning be undertaken throughout the year, out with the pupil working week, i.e. within their own time, but still part of their contract on a pro rata basis depending on whether they are full time or part time. It means we look for more twilight opportunities for our staff to undertake certain professional learning.

GO – We've already heard from UNISON a comment that Aberdeenshire Council expects its staff to train in their own time, outwith their contracted hours. Why should teacher be different?

RT How you do you evaluate and measure the impact of training?

SM We ask individuals to indicate what they felt had been the impact of training on their practice, but also, as part of the quality improvement team, when we go out on school visits we would be asking, looking at the school improvement plan, to see what the priorities had been in terms of staff developed, and expect to see that in practice in the class room. For example, if the school has undertaken a programme of active literacy with their staff, based on an identified need in their school improvement plan, we would be looking for evidence to show that had been put in practice. We would also be asking our head teachers, as part of their classroom monitoring, to ensure that they were witnessing or seeing the impact of any professional learning that had been undertaken by the School.

RT If there were not any evidence of impact, apart from officers saying they are able to – how would you seek to remedy that?

SM In our follow up discussions with our head teachers we would focus on what we had expected but had not seen. We would ask the head teacher why we were not seeing the impact of training. In respect of large scale initiatives, it is left to the school management initially to assess that as part of the PDRS, on an annual basis. The first part of the review meeting should be about looking up the recorded agreed plan for that year, then moving to discuss the impact of the agreed plan. The individual teacher would be able to talk about what evidence would be seen as part of that development. It can be something quite small that they have taken on board, or something much bigger - perhaps they have been put on a course to support a group of specific children with specific needs. We'd expect the head teacher or line manager to be gathering evidence themselves in terms of classroom visits.

RT PDRS is the equivalent of "EARS" for individual teachers? What is the up-take of EARS/PDRS across the service?

SM We expect that every teacher would undertake a review every year, and are looking at making the system of gathering that data more robust along with EARs recording. If I could refer back to the General Teaching Council for Scotland requirements, every teacher has to update their development records on an annual, and five yearly, basis. So there will be a much more in-depth discussion with their line manager, at which point they have to share evidence to show that they have maintained the standards that the General Teaching Council set out.

RT That is what should be happening, but what is happening? We heard in a previous session that only about 15% of non-teaching staff in EL& L get EARS assessment. I wonder if there is a similar situation of teachers, or if their PDRS results are similar.

SM I can only apologise; I do not have the figures that I can share. I will try and find those figures for you and produce those for you. We are already aware, as a service, that we need to put much more robust systems in place to ensure that we are reaching the figures.

RT Do you undertake the same sort of assessment processes for any internal training and external provider?

SM Although we are looking at making assessments much more robust, we feel that it should not just be immediately after we have delivered any professional learning. In advance, we want staff to be thinking about the anticipated outcome and impact that they want. Then we want to evaluate the actual learning not just when it is taking place, but as a follow up in perhaps three months, or six months down the line. This should be more robust and allow people like myself, working with external providers as well as in-house training resources, to feedback information that will be helpful in evaluating whether we have got best value in terms of training provision.

GO What happens on in service days, is that a training day?

SM We have five days. On the first day of the new term in August, it's always a school based date, where we require our schools to update staff on the really important areas such as child protection and so on. That should occur on an annual

basis. We then have two days in November and two days in February to deliver what we call authorities supported professional learning. For example in the most recent session, our absolute focus was on every school looking at assessment. This is a key national priority, so we provided, along with Education Scotland, support materials for our head teachers. We also put on courses, for schools, focussing on assessment. The second school based day we hope staff will either come to a centrally provided in-service course, or work within their own schools can follow up on that on the second day. The same goes for February: on day one we would be offering a range of courses in support of the indicative plan, with the second day would be for schools and staff to follow up on those days.

RT When you mention assessment, does that include assessment of the pupils?

SM Assessment of the pupils is required to meet the national agenda in terms of assessment.

Jl You mentioned the 50 different recommendations in the Donaldson report. I am sure some of them were fairly easy to accommodate, but how realistic were the timescales for implementing the others? I am concerned that you may be pushed to meet the targets.

SM After the report was published in 2010, a national implementation board was created. As part of that sector specific discussion groups were established, including the early phase group, about which I spoke earlier. These groups looked at taking those 50 recommendations and putting it in to a much more manageable action plan. The cabinet secretary for Education and Life Long Learning then took a follow up report which broke the 50 recommendations down in to much more manageable priorities. This including a timescale for specific action; for example, professional updates for the General Teaching Council were determined to be needed by August, 2014. So that has allowed us the opportunity to think about how we are going to support staff in understanding their role in that and their responsibilities. Another area was leadership development; they have produced national support materials and are reviewing all the courses that are available nationally. Again this gives me a clear action plan to follow. As part of my CPD remit, my Head of Service requires regular updates of where we were in relation to the nationally agreed action plan. This is an area where I very much rely on the CPD steering group to support and advise the service in terms of how we take those forward.

Jl I am aware for the last few years there has been serious problems in the recruitment of staff in north Aberdeenshire. This year we have had to go beyond the UK borders to gain the numbers to meet the requirements. Does this cause you pressures on budgets as well as time to bring people in line with what is expected in Aberdeenshire?

SM As I explained before, one of my areas of responsibility is probationers. We have a specific induction process for them. This year there were 106 probationers and since the beginning of the induction scheme, we have had 1,600 new teachers have come to us, over a ten year period. We take very seriously the need to support those probationers; we need to give them a great experience in Aberdeenshire so that at the end of their induction scheme they would want to stay on. If probationers

meet the standard required, they would be interviewed by our head teachers for consideration of coming back to our schools as fully registered teachers. Interviews are held in February for the posts we know are coming up in August of each year. I am delighted to say that the number of probationers that we kept on has grown considerably since the year before. This may relate to part of the support we provide through a scheme of mentoring. We also support our mentors. In primary school they are fully released, i.e., taken out of school on a fully time basis, in order to be available. We also have school based mentors in secondary, so for any new teachers that come to Aberdeenshire that are not part of the induction scheme, our mentors are asked to support and guide them in terms of being new members of staff in our schools.

JI Are your budgets realistic or would you be better able to fulfil your role if the budgets were greater?

SM I think the greatest barrier related not to budgets but whether we have the capacity to take staff out of schools to undertake training, that's where we have to be realistic. In terms of the new policy and strategies, these have allowed us to better identify what we can deliver, capacity wise and budget wise. That has helped us determine budget allocation.

GO Who carries out the in service days – is it the QIOs that carry them out?

SM It could be a variety of people; each of the QIOs also has a functional remit, whilst mine is specifically CPD, the other QIOs potentially are available to deliver CPD where required. We also have staff within our service, and across the service who will deliver courses as required. Sometimes schools will be happy to have school-based in service as well. Courses can be delivered at individual schools, or sometimes the cluster schools work together and share resources. With our secondary schools, on the first day in February we have professional support groups where each of the subjects in Secondary get together to work together in terms of supporting their particular subject. For example, History teachers would all get together. Also special education schools often work jointly as they have special requirements and needs.

This way of providing appropriate in service training is not limited to teachers. We also provide in service for our Pupil Support Assistants (PSAs) as well.

GO You spoke about the CPD steering group - do they draw up the action plan or do they just examine CPD?

SM The CPD Steering Group provide support in looking at and discussing the key priorities that have come in from various officers and also nationally. We discuss how we should deliver the priorities, the timing of delivery, and matters such as what could be delivered out-with the working/ pupil day. I very much value the CPD Steering Group.

RT Tell us more about the proposed extension of ALDO – how do you envisage it being used?

SM There are a numbers of things that we are delivering face to face that I feel would be just as appropriately delivered on ALDO. For example, new line managers who need support in carrying out review meetings, or the new professional update for all staff so they are aware of the process that will be gone through and their responsibilities. I feel that is something that could be delivered through ALDO. I know a number of the inclusion courses have already been developed on ALDO and have been delivered through that means, using existing handbooks. Some of the PSA training has been developed along with learning and development colleagues using ALDO, to make the speed of training more convenient for each individual. But it cannot be all online learning – there has to be a balance, a blended approach between face to face and online learning, use of technology s appropriate as an important way forward for us.

RT One of the concerns that was expressed was not all staff have PC access at work, and even if they do, they may not be given the time during their contracted hours to access training materials, rather being expected to access it at home. They may not have the means to it at home. How are you going to make sure that there is equality of access to ALDO for people, whether in school or non-teaching staff?

SM I agree this is a challenge. Not all staff are able to access say for example Arcadia. This in itself is an issue we have raised on a regular basis and I think it is one of the areas that we are going to look at is in terms of carrying out a full evaluation with all our staff around CPD. That is one of the areas that I expect the visiting panel to ask on Friday; how do we ensure that all staff are getting their training entitlement. I know from communication with other Councils that that one benefit of undertaking a review is that people are more likely to come forward through such an evaluation to advise us that they are not getting the access we would hope.

GO Our UNISON witness suggested that on in service school based days you could have a number of teachers fighting for access to a single computer.

SM I would hope that we would not get in to a situation like that, a head teacher would be planning the day so that no matter how may computers that there were in the School that there was time allocated for every member of staff to have their fair opportunity. I would be really disappointed to hear of that not being done. I also think that there's likely to be many more than one computer in any school.

? How is your budget split?

SM The budget is £350,000, split between the inclusion team, nursery provision, but I have overall responsibility to ensure that the action plans are followed up to ensure that the spending that was planned has either taken place, or will take place before the end of the financial year.

RT How much of that would you consider would be external?

SM That I don't know off hand but I would be happy to come back to you with this information.

RT Corporate induction, does it happen?

SM Certainly all of our new teachers and all of our probationers, used to attend corporate induction. A couple of years ago we piloted an online attendance. All of our new probationers and our new teachers are now given the link and asked as part of their initial development to make sure they attend. We hear back follow-up where people have not undertaken induction.

But I think there is a case of we could do better with our corporate induction programme. We also provide a whole range of induction programmes for our new teachers. It should also be offered to PSAs and all other staff, but I would not have the figures to show exactly how many of them have undertaken. All I can assure you is that the officers are provided, by the induction team, with a clear, prioritised programme of courses which the PSAs should take.

GO We have been given Corporate Services' new check list for induction programme and employee handbook which I thought was marvellous. I would love to see each and every directorship producing something of this nature.

SM We certainly have a handbook for new teachers which takes them through step by step. I'll provide you with a copy. It's part of a portfolio which has been developed to support them through their initial year of teaching. Although it's mainly for probationers, the contents are widely available in our schools, all our mentors you see training and support in using that. We would certainly be happy for anyone to be using the contents of that; we have it because it is a requirement for us to support our probationers.

CS Did you have to supplement or adopt your material for the Canadian and Irish teachers when they came to work in Aberdeenshire?

SM Any teacher who comes to work in Scotland will be required to work with the new standards that are produced by the General Teaching Council. That is always the core to which we work. There might need to be what is called a flexible route or additional probationary period, but the same support materials would be appropriate for any new member of staff. There would be no extra real work involved.

RT Does your budget for training include the cost of cover for teachers that have to go off and train, or would that come out of the schools' individual budgets?

SM Where appropriate, these decisions would be made at the point where an action plan is drawn up. It's only then that we would be deciding whether we should be offering cover to the schools, or whether we'd expect the schools to use their own devolved budget to provide the cover.

RT Where you identify a training need or weakness exposed in professional competence, how do you find out address this?

SM It would depend on different levels; the individual could go through a review scheme or self-evaluation through evidence we would be looking at where an individual might require support. In terms of groups of staff, particularly in an

establishment, we would be looking for the schools to do a self-evaluation process to produce an improvement plan, to address the local need as well as be in line with the national priorities. In our PDRS we also ask staff to think about where they feel their knowledge and skills are, and what support they would require as a result of that self-evaluation. Absolutely everything in learning and development should be based around individuals, groups and establishments self-evaluating, and with the support of officers in identifying what are the key priorities.

There are a number of self-evaluation tools available, for example we'd expect staff to be looking at the new standards produced by the General Teaching Council for Scotland. These are a professional requirement. Other tools include the "How Good Is Our School?" where we would be asking head teachers to lead a self-evaluation exercise with their staff using the quality indicators to identify where they are. Her Majesty's Inspectors of Schools will also come in to schools and will look at where the school feels they are in terms of their self-evaluation; they will measure them in terms of the evidence they see. We also look at what we see during that inspection of the school, and will then support the school in terms of any actions that are required as an outcome of that inspection.

There being no more questions, the Chair, on behalf of the Committee, thanked Sheila for her informative presentation.

SUPPLEMENTARY INFORMATION FROM EDUCATION, LEARNING AND LEISURE

The current CPD budgets are:

CPD - Non-Devolved

Administration & Management (Including centrally charged CPD) - £279,000

Nursery - £5,000

Special (Inclusion team) - £103,000

Community - £1,000

CPD - Devolved to Schools (Before balances carried forward from previous years)

Primary - £214,000

Secondary - £147,000

Special - £41,000

The Schools budgets are based on an initial allocation of 3 days cover with the remaining budget being allocated based on the number of teaching staff. However despite the budget being allocated based on a teacher basis, it is not an individual teachers allocation and can be used all identified staff development needs.

Split by provider - Generally there are not internal recharges done for training provided. On occasions where a teacher travels to another school to provide training the school may provide a reimbursement to the teacher's base school for the cost of supply cover but additional charges are not made. As such all charges will either be external or costs related to attendance at training events.

5 DECEMBER, 2013

PROCUREMENT – SESSION WITH CRAIG INNES, HEAD OF PROCUREMENT

Present: Cllrs G Owen (Chairman); R Thomson (Vice Chair), N Cullinane, S Duncan, J Ingram, and C Shand.

Apologies: I Tait, K Farquhar and M Watt.

Officers: Craig Innes, Head of Procurement.

Cllr Owen, on behalf of the Committee, welcomed Craig Innes, Head of Procurement to the meeting and invited him to speak on his consideration of procurement as it related to budget commissioning of learning and development.

CI There are two sides – one I know more about, procurement – and the second on training budgets, where I don't have so much detailed knowledge – but I can talk about the principles. There are two strands, corporate service's training and development commissioned services, and where the funds are distributed to services to apply as appropriate to their service needs. I think there is room for improvement generally – there are efficiencies to be gathered from size and better coordination, a more joint up approach.

From my side, it's difficult to pick up the actual spend on training, often purchases don't jump out as training providers – yet over £2M is spent across the authority – I can see that, but not the specific instances. If more were done collectively, there would be economy of scale in terms of the unit price, and also the larger tenders may give us the options to negotiate and encourage providers to “sharpen their pencils” and become more competitive in pricing.

A coordinated approach would also allow us to work more proactively with partners in areas of common interest. We already do a lot of procurement with neighbours in the City and Moray Councils and with the NHS and the Universities. While there are specialisations in terms of training requirements, there could be shared courses in terms of management development and related activity which you would expect to follow the same broad tenets across all public sector bodies. It ought to be possible for one partner to take the lead responsibility and ensure standardised provision. At the moment, it all seems rather “bespoke” and that may have implications for ensuring standard of provision, as well as its positives in being exactly what is wanted.

This is not a criticism of HR colleagues – it's difficult to look across the piece and analyse what's happening to identify common needs. Having said that, I would see the time spent in doing this to be very much off set by savings of time and resources which I think would be achieved.

Jl Does your section get involved in sourcing of training – or is it left to the HR service and the departments?

CI Both. If the cost is over £60k, the purchase needs to go out to tender and it should therefore come through us. However, a lot of the training is bought in pockets of £10k, or £15k which the services have delegated authority to commission

directly. If we were to take stock of the overall picture, I think we could categorise the spend into groupings which could then be more competitively tendered in the open market. Spend sits at present in the services, and although there are service specialisms, there are more often training needs that relate to general categories of posts (e.g. manager/ supervisor skills, negotiation, working with people in teams etc.) which should be similar regardless of source service.

JI Would you welcome the opportunity to become involved? Do your staff have the awareness needed to support the specialisms and challenges of training commissioning?

CI I'm reporting to P&R in February, 2014 on a proposed (or has it already happened?) restructuring of my team and its work. It's a transformational programme across the whole of the council on the issues of procurement and commercial awareness. My team could certainly cope. On the technical side, the specialisms would be tailored in discussion with the commissioning service to ensure they got what they wanted. Once that was agreed, we would do the market sourcing and engagement and thereafter support the tender itself.

But before this could happen, there's a need to ensure we're getting robust data – there are problems at present with miscoding for training, another factor which makes it harder to pick up. This is an issue I'm working on with colleagues in finance.

CS How many are in your team?

CI Not enough! We have the lowest unit costs in Scotland and it needs to be addressed. This is one of the drivers in the report to P&R. The procurement team should be cost neutral, so I'd expect to get capacity which would be offset in the savings or value coming back to the Council. I'm looking for 6 additional members of staff. There's an issue on recruitment in terms of calibre and capability and I've been benchmarking with elsewhere to see if there's anything to be learnt from what they do. I've also been looking at succession planning – i.e. the potential to "grow our own". There's also a need to cascade more general procurement awareness across the Council as a whole. Although there's a tool kit in place and expected compliance, there are still challenges. A lot is already being devolved.

CS Does your team have the specialisms to support contracts such as waste lorries?

CI At present, we have specialist knowledge about ICT and Fleet. We're working better with construction and social care which are the two biggest areas of council spent. I think there's now a more collaborative working relationship with services. It's a two-way process – the service brings their technical awareness to the table – they know the history and tradition of the market places better than we do. I feel this team approach can deliver and be an asset for the Council.

CS Is your team training the same as provided in the City and Moray?

CI Our professional training follows the same lines across all 32 Scottish Local Authorities – we already bring trainers to Aberdeen as a resource shared with other public bodies such as Fire & Rescue and Police. Like accountants, we are aligned to a Chartered Institute. Some of our staff are already qualified, others currently studying. It can be a big ask for a member of staff, especially if in full time employment, to undertake the year of study required. There is training at the Universities, but as this is oil and gas sponsored, there tends to be a bias in the focus specific to their needs. The public sector has a different regime when it comes to accountability. We do work well with the private sector network when it comes to joint training in areas such as negotiation skills- although they are harder nosed that we can be. Looking forward, I'd want to see our staff being better equipped for negotiations and market manipulation.

I have a dedicated budget for staff training and I'm very frugal in my approach – I challenge the team to demonstrate the benefits of a particular course if they're asking for that training. I'm also keen on the "train the trainer" approach – both for my own team and for other services.

There's an opportunity here to do better across the council on that cascading information route – if there were a database listing in-house experience and specialisms – "expert on.../ trained in.../ background of..." This would be advantageous – we don't know, so can't make enough of, in-house resources.

CS Is it in your remit to procure training?

CI At present, it's devolved to services that may or may not involve us. I still think that if we could identify a commonality of need, the combined value would breach the tender threshold and, possibly generate competition which might lead to better rates, or new providers, and even, better courses?

SD Do economies of scale apply in training as well as in procurement?

CI They apply across the board. I know that there are individual schools out there doing their own thing – but if you put that in the context of 17 Academies, providing the same service, surely there must be some common need. I appreciate that people may be at different stages, and that backfilling of too many front-line posts at the same time to attend a particular course.

I also think there's challenge to be made when the budgets for training are being created. Services should be asked "what are you going to use it for" – this would be another opportunity to consider consolidating across services and going to the market place with more bargaining power. At the moment, purchasing seems to be rather reactive, not planned at the start of the year. We're working with services to improve this process at present and the Directors have agreed that CPU be involved at the budget setting stage. This should ensure a compliant process and maximise efficiencies.

JI How do you retain staff with such market attractive skills? Are we providing them too much training which means they go elsewhere – or not doing enough to hold them?

CI I'm not unique amongst peers in having a high turn-over of staff; I lost two recently to the oil and gas sector. Both felt it was a backward step in terms of career development and might be boring, but the additional £20k salary was impossible to ignore. I'm trying to get smarter in retention by developing a clear career path and "growing our own". A number of my staff genuinely want to work in the public sector and working with the Council, but when category managers are paid £40k, and BP pays similar posts £80K and people at my level commanding £800-£1,000 per day, it's not easy. So I'd always support the training and development of staff, even if they move on after a couple of years, we'll have benefitted from them during that time. We're looking at graduate entry, with the idea that they will move on after two or three years. Within the Council I'm not alone – Alan Wood has the same issues with accountants, and Karen Wiles with solicitors.

I network a lot with the private sector in the north east and, to be honest, when I hear of their projects, I feel bored. There's a lot here to invigorate and excite folks.

J1 Isn't there a risk in investing too much in training which makes your staff more attractive to private operators?

CI That risk is offset by attraction – some folk are attracted to Aberdeenshire as an employer specifically because they see a chance to up-skill. Our professional training takes four years, but there's a pay-back clause at the end, if the employee leaves within a certain timescale.

J1 Is there any opportunity for apprenticeships? Do, or could you, support this?

CI The majority of my team come without any specific procurement background, and invest a great deal of personal time in up-skilling – one of my staff comes from a warehouse background but, hungry for the opportunity, does well. The Government's invested in the NVQ level procurement, equivalent to the HNC route), and we're involved, with other councils in joint training (provided in Forfar). There's growing awareness of the needed skills set but not a lot of resources at present. When you look to see where the graduates from central belt colleges go, there's not much movement – Aberdeenshire has a high cost of living and we're not so attractive. We need to be an employer of choice.

RT Tenders over £60k need to go through the CPU? Is this individual items, or can it be a cumulative total?

CI Yes. In this way, over time, we've learnt a lot about social care and construction procurement – the service representatives facilitate the process and we set up the tender. The cost barrier relates to all over value – for example, a PC software contract may cost £40k plus support and maintenance; this is total life cost and in due process such a tender would need to go to Committee as a net aggregated annual value.

RT But what if there were 60 separate instances of training tenders at £1k each – would this be identified and processed by you? Of the £2M cross service training budget, what percentage cross your desk?

CI Very little - probably only £100-150k at present.

RT Would tighter financial coding help?

CI Yes. I've just discussed that with Alan Wood and his team – it's about management information as well as visibility. If you need an extra £5k for training, don't code it as stationary! A tighter coding system could close that down. There's also the potential to look at zero base budgeting in challenging services on their training spend – tell us what you need and what it will cost, and we'll allocate that. It's right that it be delegated to the services to determine what it needs to deliver its services – whether that be staff, equipment or resources – but structure your budget at the start, don't "salami slice" it. The reconsideration might identify additional areas of growth to be met, but also areas where provision was no longer required. At present, I think there's a luxury of flexibility in the cost centres which isn't helpful. If new training needs are identified at a cost of £x, services might be challenged to identify what they would give up to offset this in their budget forecast. This would be a more intelligent and challenging process of assurance, rather than the same as last year plus inflation. It's a big task to undertake, but I'd see the resources needed to do this as being invest to save.

SD I can see the merits in zero based budgeting, but the last time this was considered across the Council budget as a whole, it was dismissed as a cost that would outweigh the benefits. Are your staff trained in research – the lowest price may not always be the cheapest option in the long term.

CI Yes, although this is an area at which we could do better. There should be increasing visibility at the time the budget is shaped in order that we have more awareness of what the need to spend is, rather than having to go to the market place in a rush. In that instance we lose the opportunity to research fully. If it is shaped from the front, we can design a good contract, with well-considered Performance Indicators which allow us to manage the contracts better. All too often in the public sector we only consider the tender in the contract itself, or when it comes for renewal on the refresh of an existing contract. If we're involved early, we can look to stimulate the market and attract new people in, it's possible that we can encourage economic development at a local level through building a contract. It would also reduce the potential to be "held to ransom" by sole or specialists providers. There are so many variables in the markets for service provision – for example, a couple of years ago construction projects were coming in at very competitive rates as firms were desperate for work; now we sometimes struggle to attract their interest.

There being no further questions, Cllr Owen, on behalf of the Committee, thanked Mr Innes for a very engaging and informative session.