

**A report by the Scrutiny and Audit Committee**

**Cross Service Learning and Development Budget Commissioning  
and Delivery**

**March, 2014**

**SAC Report No. 24**

<b>CONTENT</b>	<b>PAGE</b>
<b>SUMMARY</b>	1
<b>1. Introduction</b>	4
1.1 The Scrutiny and Audit Committee	4
1.2 This investigation	4
<b>2. How the investigation was progressed</b>	4
2.1 Documentation	4
2.2 Witnesses and evidence gathering	6
<b>3. Understanding the “employee journey” from entry to exit and consider how learning is identified, planned, delivered and paid for and whether there are improvements that can be made</b>	7
<b>4. Learning and development budgets and how they are managed at corporate, service and local levels, including how much is delivered internally and commissioned externally, and find out if there are ways we could improve quality and get better value for money</b>	9
<b>5. How is learning and development currently evaluated and whether there are better ways of assessing the “so what” factor</b>	10
<b>6. How other councils and large public sector bodies manage their learning and development corporately</b>	10
<b>7. The role learning and development plays in staff recruitment and retention</b>	11
<b>8. Thanks and invitation for feedback</b>	12
<b>9. Appendix - Investigation programme and witnesses heard</b>	13

## SUMMARY

This report sets out the process, conclusions and recommendations of the 24th investigation undertaken by Aberdeenshire Council's Scrutiny and Audit Committee, into "Cross Service Learning and Development Budget Commissioning and Delivery."

The Committee, having considered the questions originally set in the terms of reference for the investigation, and the evidence provided by witnesses and included in the documents submitted for its consideration, believes that Aberdeenshire compares well with both other public sector organisations, as well as private companies, in delivering wide-ranging and effective training and development opportunities to its staff. There are challenges in ensuring that the options are available in an accessible for; in some cases, in making them available within the working day; and also ensuring that it is not just training to undertake the current post, but also allow for the future development of individual members of staff – as a resource for the council as well as for job satisfaction and retention. Members feel that there should be closer links between identified levels of competencies for jobs; the annual review process (Employee Annual Reviews, (EARs<sup>1</sup>) and Chief Officer Appraisals, (COAs<sup>2</sup>), for non- teaching staff and Professional Development Review Schemes, (PDR<sup>3</sup>) for teachers); and training available.

It is clear that managers have a crucial role in ensuring that staff are properly supported in their learning and development, and that employee reviews, linked to training, are carried out appropriately and timeously, making the best use of resources. The Committee is also aware of the pressures on management time but would suggest that the supporting of staff in their learning and development to be critically important. Aberdeenshire's approach, nurturing Leadership and Development in managers, and now concentrating on the "softer" management skills, as well as technical or professional competencies, is seen to be working in the right direction. The recent Policies In Practice initiative is a positive step in supporting this.

The move away from classroom-based learning to a "blended learning" approach is commended as being at the forefront of comparators. However the Committee feel that Aberdeenshire Learning and Development Online (ALDO<sup>4</sup>) is restricted – not all staff are office-based, or have access to a computer. There is also a lack of clarity as to whether employees are expected to do the learning in their own time, as opposed to as part of their working day. Having said that, ALDO's flexibility in being accessible when people have the time for learning and development, or as a "just in time" reminder of a particular process or procedure, is welcomed.

Learning and development's decentralised budget is, on the whole, considered to be a good thing, although there may be a need to better coordinate training commissioning across all services. More could be done to share experiences of good results, whether from participant feedback, or observed improvement in performance. While training boards exist in some services, it is felt that there would be benefit in having a cross-service perspective on the use of resources. It is possible that consolidation of commissioning might achieve a more

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<sup>1</sup> EARS – Employee Annual Review Scheme

<sup>2</sup> COA – Chief Officer Appraisal

<sup>3</sup> PDRS – Professional Development Review Scheme

<sup>4</sup> ALDO – Aberdeenshire Learning and Development Online

market competitive price, or allow a trainer to come to Aberdeenshire, as opposed to having employees travelling outwith the Shire to access the necessary courses. To go as far as some other councils, such as Fife, in having all learning and development centrally coordinated and provided by a service level agreement with a single provider, does not seem appropriate for Aberdeenshire at present.

The Committee welcome the collaboration, across public sector agencies in the North East of Scotland, of shared training, where appropriate, and the strategic consideration which goes along with it. This is an area where further development might be possible in terms of both shared aims and potential economies of scale. The discussion, round-table, by partners is welcomed as a means of sharing good practice also.

In terms of using ALDO as a resource, the current access to its resources by community planning partners, other public sector agencies, and the third sector is commended – but there may be an option to consider extending it to the private sector, where appropriate, as a possible revenue benefit to the Council. Areas such as manual handling courses and working with people cut across both public and private sector requirements.

Members noted that as part of the McCrone agreement, working to the national standards of review and annual checking, teaching staff, have 35 hours set aside specifically for dedicated training. It is felt that this should be applied to all other staff also, to ensure equity in access to learning and development.

In terms of learning and development for elected members, it is felt that more could be done to allow better resourcing of needs, both in the immediate period post-election, and in terms of continuous improvement. To have a group through which requirements could be expressed more formally, and appropriate support considered, would be beneficial.

The Committee believe that Aberdeenshire Council is committed to supporting its staff - and using learning and development opportunities for both recruitment and retention in an increasingly competitive market which often affords pay far greater than local government can offer. The continuing expansion of its apprenticeships, both traditional and “modern”, support for the registration of all care workers, and the development of a career path for carers demonstrates this.

**The Committee would recommend that the undernoted be considered, all to be seen in the context of the Council’s wish to be an employer of choice and an organisation of learning and development:**

1. That a single financial code be created for all costs associated with training, which would enable the easier identification of what was being spent;
2. The opening up ALDO for use by external organisations and, as the Council works more and more with partners, to make sure our training is also available to third sector organisations;
3. The Council should explore the possibility of increasing reciprocal arrangements on sharing training with partner organisations;
4. That Senior Management Team to consider how best to coordinate, within existing groups, such as the Workforce Strategy Group and the Leadership Reference Group, the undernoted areas:

- Co-ordination of training availability across partner organisations;
- Monitoring of availability of relevant training across partner organisations;
- Identification of corporate skills gaps, particularly those related to strategic issues;
- Communicate with external partners to make them aware of the courses the Council is running, or participating in;
- Carry out the duty of monitoring efficient spending of resources – challenging spend, where appropriate; and
- Ensuring that induction training – both corporate and service-specific – is carried out timeously.

Services should retain responsibility for their training budgets.

5. That the immediate evaluation of training for an individual, and its impact, should remain at (line) manager level;
6. That EAR reviews should be carried out regularly, be fit for purpose and with adequate records kept;
7. That a competency framework be developed, covering all council employees, which can be linked to both the EARs process and learning and development opportunities.
8. To commend ALDO as an appropriate and effective method of cascading available blended training, but express concern about equality of access across all types of staff.
9. To commend the Corporate Service's Employee Handbook and Induction Checklist as good practice models to be adopted across all services;
10. To welcome the increasing use of all apprenticeship opportunities and encourage further development of the schemes across all services;
11. That a Continuous Professional Development "allowance " be allocated to all employees, suggesting 35 hours pro-rata, identified in discussions with line-managers through EARS/PDRS/SOA, and properly recorded through the new i-Trent HR and Payroll system; and
12. That a cross-party reference group be established for Councillors' Continuous Professional Development, to be a conduit for communication to, and from, colleagues and be advocates for any learning and development proposed and planned.

In general terms, the Committee would commend the intent and direction of Aberdeenshire's current learning and development practices.

## **1. INTRODUCTION**

### **1.1 This investigation**

1.2.1 The Scrutiny and Audit Committee, at its meeting on 16 May, 2013, agreed that an investigation be undertaken into “Cross Service Learning and Development, Budget Commissioning and Delivery.” The work began on 8 September, 2013, with a lead service briefing and 17 evidence gathering sessions were held, with both internal and external witnesses, in the period to December 2013. Consideration of the evidence and the drafting of this report continued to March, 2014.

1.2.2 Members who took part in this investigation are listed in the Appendix hereto.

1.2.3 The Committee chose to consider the topic as it was recognised to be a matter of concern, which might relate to staff morale, the resilience of the organisation in times of staffing pressures and the ability of the Council to be perceived as an employer of choice, offering staff development and support to underpin competitive recruitment and continue retention. At the outset, it was agreed that the purpose and objectives of the investigation should be to consider:-

- To understand the “employee journey” from entry to exit and consider how learning is identified, planned, delivered and paid for and whether there are improvements that can be made;
- To investigate learning and development budgets and how they are managed at corporate, service and local levels, including how much is delivered internally and commissioned externally, and find out if there are ways we could improve quality and get better value for money;
- To understand how learning and development is currently evaluated and whether there are better ways of assessing the “so what” factor;
- To consider how other councils and large public sector bodies manage their learning and development corporately; and
- To consider the role learning and development plays in staff recruitment and retention.

The detailed brief for the Committee’s investigation is available on the Committee’s webpage at: - <http://www.aberdeenshire.gov.uk/about/scrutiny.asp>

## **2. How the investigation was progressed**

The Committee undertook a range of different activities to enable it to carry out this investigation.

### **2.1 Documentation**

2.1.1 A range of background documentation was provided to the Committee at the commencement of the investigation. This included information from both within and outwith Aberdeenshire Council:

#### **Internal**

1. The Learning and Development Strategy implementation Plan Update to Policy and Resources, June 2012.
2. Report to Management Team – January 2013 – Action Learning Review.

3. Collaborating for Added Value – the North East Public Sector Development Group – May, 2012.
4. Background to the Learning and Development function in Aberdeenshire Council, Briefing Note, September, 2013.
5. HR&OD POLICIES:
  - (a) Learning and Development Policy;
  - (b) Learning and Development Procedure;
  - (c) Learning and Development Strategy Update – Report to Policy & Resources Committee, 19 September, 2013;
6. Management Development/ Leader Development:
  - (a) Facts, Figures, Information;
  - (b) Leading the Way – Leadership & Management Workshop Calendar;
7. HR&OD Policies – Employee Review Scheme – Resources Pack
  - (a) Forms overview;
  - (b) Employee Annual Review Form;
  - (c) Professional Development and Review Scheme for Teachers;
  - (d) Chief Officer Appraisal Procedure;
  - (e) Chief Officer Appraisal – Leadership Competencies Assessment Form;
  - (f) Service Manager Appraisal – Leadership Competencies Assessment Form;
  - (g) Employee Annual Review Process Flowchart; and
  - (h) Chief Officer Appraisal Process Flowchart;
8. Extract Competency Matrix – Roads.
9. Corporate Service, Induction Programme and Employee Handbook –Arcadia cover page.
10. Corporate Services – Induction Checklist.
11. Corporate Services – Employee Handbook.
12. HROD Structure, September, 2013.
13. Background information on roles and remits of the Leadership Reference Group and Workforce Strategy Steering Group – December, 2013.

### **External**

14. Chartered Institute of Professional Development Documents:
  - (a) Learning and the line – the role of line managers in training, learning and development;
  - (b) Continuing Professional Development Policy;
  - (c) Change agenda – The value of learning – a new model of value and evaluation;
  - (d) Research Insight – Aligning learning to strategic priorities; and
  - (e) Annual Survey Report, 2013 – Learning and Talent Development
15. NHS Grampian:
  - (a) Workforce Plan, 2013;
  - (b) Healthcare Support Workers in Scotland – Mandatory Induction Standards; and
  - (c) Code of Conduct for Healthcare Support Workers
16. North East Learning Collaborative Update – June 2013
17. General Teaching Council, Scotland:

- (a) Professional Update – A GTC Scotland Position Paper; and
  - (b) Scottish Government Response to *Teaching Scotland's Future* – Annex A – Table of Response to Each Recommendation.
18. Fife Council:
- (a) Social Work Workforce Planning and Development Action Plan, 2013 - 14;
  - (b) Course Evaluation Documentation;
    - (1) The pre-course questionnaire;
    - (2) The on the day training evaluation; and
    - (3) The post course questionnaire;
  - (c) Induction Guidelines; and
  - (d) Induction Checklist.
19. Dumfries and Galloway Council:
- (a) Scrutiny and Performance Committee - Review of Training and Staff Development - Survey of how other local authorities deliver training and development services, March/April 2013 (Key findings); and
  - (b) Survey Spreadsheet of Responses.

## Websites

Learning and Development Page on Arcadia:

<http://arcadia.ad.aberdeenshire.gov.uk/intranet/itradpub.nsf/0/232896DE99B99518802574670055265C?OpenDocument>

Learning and Development Policy:

<http://arcadialite.aberdeenshire.gov.uk/?p=11243>

Leadership and Management Page on Arcadia:

ALDO (Aberdeenshire Learning and Development Online)

<http://aldo.aberdeenshire.gov.uk/login/index.php>

- 1.2.3 It has been agreed that the Scrutiny and Audit Committee should appoint independent external experts to assist with its investigations where appropriate. For this investigation, it was determined that there would be no added value in such an appointment.

## 2.2 Witnesses and evidence gathering

- 2.2.1 Members of the Committee met a cross-section of Aberdeenshire Council officers. The Committee sought their views on how learning and development needs are identified and supported; the whole work life experience of staff in terms of learning and development; how training and development is commissioned, delivered and evaluated; how learning needs are identified in annual staff reviews and appropriate development support is given; how learning delivery is evaluated and informs future training decisions; and if access to developmental learning might be considered an attraction to make Aberdeenshire an employee of choice, more resilient in meeting changing service needs, and better able to retain staff in a competitive job market.

The full list of Aberdeenshire Council staff who appeared as witnesses during the investigation is given in the list of meetings detailed in the Appendix.



- 2.2.2 Individuals with relevant expertise from a wide range of organisations, including the Chartered Institute of Personnel and Development, the Robert Gordon University, The Improvement Service, and NHS Grampian, were invited to give evidence to the Committee. A full list of the external witnesses interviewed during the investigation is given in the Appendix hereto.
- 2.2.3 Full details of the evidence given to the Committee by witnesses can be made available on the Committee webpage at <http://www.aberdeenshire.gov.uk/about/scrutiny.asp>

### **3. Understanding the “employee journey” from entry to exit and consider how learning is identified, planned, delivered and paid for, and whether there are improvements that can be made**

- 3.1 Members heard initially from Laura Simpson, Head of Service, Human Resources and Organisational Development, and Paul Henderson, Learning and Development Manager, that the assessment of learning needs was initially identified in the recruitment and selection process, then confirmed in an early “employee review” when the staff member took up post. From this beginning, the Employee Annual Review (EARs), Chief Officer Appraisals, or Professional Development Reviews, (PDRs, for teachers), should take place on a regular basis; as part of this process, consideration should be given of what learning was required, what had been undertaken since the last assessment and what were the discernable outcomes of that training, and what future development was needed for the coming year. Discussion of learning requirements should relate to the current position, but development might encompass moves to “grow our own,” or future-proof succession planning to make the Council more resilient.
- 3.2 This approach was confirmed by other witnesses, including Philip McKay, Head of Service, Roads and Landscaping. He also linked the identification of training requirements to a matrix of competencies expected, or needed, for specific jobs within his service; some skills were crucial and needed before a recruit could be deemed operationally competent or to meet Health and Safety requirements; others were about developing potential to benefit both the organisation and the staff member.
- 3.3 From Mike Healy, Team Leader, Leadership and Management, the Committee heard of an increasing need to provide managers with development in the “softer” skills such as courageous conversations, and people skills. The manager role could be seen to have evolved from a guardian of professional competency to needing to monitor, mentor, and encourage staff. The link between line managers and the best coordination of learning and development need was stressed by witnesses. The Committee heard from Karen Mears, Team Leader, Policy, Human Resources and Organisational Development, of the recent initiative “Policy in Practice”, which sought to assist line managers in being able to apply all relevant policies to support their staff.
- 3.4 Richard Tucker, Team Leader, Employee Development, gave Members a demonstration of how ALDO, (Aberdeenshire Learning and Development Online,) worked. Courses could be customised to suit the specific needs identified by services, and left as an online resource which could be accessed whenever needed – allowing

for both “just-in-case”, as well as “just-in-time”, training requirements. The input of service officers in shaping the courses meant that checks could be made that only relevant material was included; this was not always the case in externally purchased training.

- 3.4 The role of line managers in encouraging and supporting staff attendance at, and participation in, learning and development was stressed by officers; but there was also an acknowledgement that, in times of increasing time pressures, it was often hard for managers to make time available for this role.
- 3.5 Anne Stevenson, until recently Chair of CIPD<sup>5</sup> (North) and Teaching Fellow and Human Resources Management Group Lead, Robert Gordon University, (RGU<sup>6</sup>), and Anne Inglis, Head of Organisational Development, NHS Grampian, both cited models of mixed learning as being established good practise, with the public sector in advance of private comparators in making use of online resources to encourage flexible access to training. Both spoke of the increase, across north east public sector organisations, of pool resources, or sharing mutually appropriate training.
- 3.6 The Committee met with Alison Mackenzie, ICT Service Development Specialist, and Jenn Askildsen, Team Leader, Support Services, Corporate Services, of an induction guide for managers, and the Employee Handbook. Both documents were intended to be handy reference guides, for both the manager and the member of staff, and charted what should be expected/ delivered at specific points of the employment journey.
- 3.6 Fiona Robertson, Staff Development and Training Coordinator, Housing & Social Work, and Sheila Marr, Quality Improvement Officer, Education, Learning and Leisure, both spoke of the structures within their services to ensure that training was available as appropriate to officers, initially to allow them to meet any statutory requirements of the job, and thereafter to allow their personal development. The latter might be an attraction to retain staff where there were other employment options available, or better fit the authority’s own succession planning, by “growing our own”. It was suggested that a value judgement needed to be taken as to whether the “nice to do” learning and development might also make council staff more attractive to external parties. In a session with the Head of Corporate Procurement, Mr Innes spoke of losing staff to the private sector; but he still believed that allowing additional training was of value to the Council itself while the officer remained in post. The Council retained the right to ask for any costly fees to be repaid if the member of staff left too soon after receiving the training, but in many cases, it was decided not to pursue small amounts.
- 3.7 From the Union representatives, Ines Teece, of UNISON and Pat Flanagan, of the EIS, the Committee heard of general satisfaction with the approach taken by Aberdeenshire Council to the training and development of its staff. Mr Flanagan referred to the national agreement which sought to ensure that teaching staff received the equivalent of 35 hours personal development per annum. This was linked to the

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<sup>5</sup> CIPD – Chartered Institute of Personnel and Development

<sup>6</sup> RGU – Robert Gordon University

new requirement from the General Teaching Council Scotland (GTCS<sup>7</sup>) in support of the implementation of the Donaldson report in 2011, for each teacher to have an annual review which assessed their continued competence for registration. Ms Teece spoke of having seen great improvements in the provision over the past few years, but raised the issue of whether staff were all given equal access to learning and development in terms of having dedicated time set aside for personal development. The increasing variety in how training might be accessed was welcomed by Ms Teece, with the caveat that staff should not be expected to undertake training deemed as “work essential” outwith working hours.

4. **Learning and development budgets and how they are managed at corporate, service and local levels, including how much is delivered internally and commissioned externally, and find out if there are ways we could improve quality and get better value for money**
  - 4.1 In the Lead Service Briefing, made to the Committee by Laura Simpson, Head of Service, Human Resources and Organisational Development,, and Paul Henderson, Learning and Development Manager, Members were advised that the majority of budgets allocated for training and development were dispersed to each service to manage – only a small sum of £47,000, out of an estimated total spend of over £2 million, in the current financial year, was used to support the corporate learning and development function.
  - 4.2 Alex Stephen, Corporate Finance Manager, spoke of the difficulties in extracting all training, and training related costs, from the ledgers as a variety of codings might be used, and not all training was specifically flagged as such. For example, accommodation for a training event, or travel to an external event, might not show up obviously as a training cost in every case. Although a list of assumed external training providers could be extracted from analysing purchase orders, the manner of recording seldom linked to a specific course. This made it hard to assess the cumulative use of specific providers across the Council. It was therefore difficult to identify the split between in-house delivery and external provision. Officers from Human Resources and Organisational Development also spoke of the increasing trend to “train our own”, and allow knowledge to be cascaded through the organisation in this way.
  - 4.3 Given the variations in recording all providers, and the further complication of getting a valid assessment of the value of training, it was difficult to focus on the cost effectiveness of training. The Council was not alone in struggling to assess its training, both internal and external – having moved from the on the day “happy sheets” scoring, participants, and their managers, were now being encouraged to assess the usefulness of what had been learned as applied in their daily jobs. Officers would be asked to consider what the benefit had been, and managers to observe the difference made by training having been undertaken.
  - 4.4 Craig Innes, Head of Procurement, suggested that it might be possible that additional value for money could be attained if services, requiring similar courses, would go out to the market place as a collective. This might also stimulate greater competition amongst providers, and also a better price per course.

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<sup>7</sup> GTCS – General Teaching Council Scotland

- 4.5 Officers from both Human Resources and Organisational Development and the services were unanimous that, whilst a greater degree of awareness at a corporate level of what was happening in each service might be beneficial, there would be little advantage in centralising all training requests; it was emphatically reported that the line managers and the services themselves were best placed to identify what specifically was required for the individual member of staff, or service. Mr Healy, Team Leader, Leadership and Management, reported that this had been his experience when previously employed by a large oil company – the local knowledge of supervisors, or line managers, was best.

## **5 How is learning and development currently evaluated and whether there are better ways of assessing the “so what” factor**

- 5.1 Members were advised that, in line with current good practice across both private and public sector organisations, there had been a move away from a single, on the day, “happy sheet” completion as the assessment of a course, or learning experience. This tended to be more often comments about the room, refreshments, or trainer, and did not reflect the value taken from the course/ learning by participants. Officers from Human Resources and Organisational Development and all services stressed that staff would receive follow up surveys, after a reasonable period of time, to see how much their performance had improved, or skills been expanded, after attending a course. The various annual staff review processes would also allow for this improvement, or change, to be discussed with line-managers. Changes would also be observed by line managers on a daily basis and discussed at regular one-to-ones with staff.
- 5.2 Anne Stevenson, (CIPD and RGU), spoke of the assessment of the effectiveness of training as being the most long standing, and least easily resolved, challenge for organisations. In her opinion and experience, there was no one “best practice” answer. She felt the approach being taken by Aberdeenshire Council was as good as any and better than most.

## **6. How other councils and large public sector bodies manage their learning and development corporately**

- 6.1 The Committee heard from Maureen Ward, Workforce Development Team, and Roy Lawrence, Team Manager, Workforce Planning and Development, Social Work, of Fife Council, of their approach to learning and development. There was no in-house resource, beyond a training team of four whose role was to co-ordinate, rather than directly deliver, training; the entire learning and development having been outsourced. On that basis the external contractors would, within the level of their contract, provide, (directly or by sourcing), the required learning opportunities to support the needs identified by service learning need plans. The Council operated a series of different procedures which equated to Aberdeenshire Council’s staff review processes. Satisfaction levels with the courses were high (80-90%) and Ms Ward could not pin-point any obvious disadvantages to the system. In 2011/12 Fife spent

about £4 million on learning and development as a whole, from a budget of £800 million.

- 6.2 From Dot McLaughlin, Organisational Development Programme Manager, the Improvement Service, the Committee heard of the trend towards sharing resources across public sector organisations with common aims. She also referred to areas which were most highlighted at present, mainly relating to new ways of working required for local authorities to enable their staff to be able to function in the partnership structures which were becoming more and more common. She spoke of a survey, undertaken by Dumfries and Galloway Council, into learning and development which showed that there was no one single approach to the commissioning and delivery of learning and development across Scottish Councils. Some operated a centralised approach whilst others favoured a more devolved model. Ms McLaughlin suggested that although no single best practice model existed, most councils were trying to align learning and development to front-line services.
- 6.3 Anne Inglis, (NHS Grampian), spoke of learning and development being managed in NHS Grampian in line with Health Service nationally established priorities and specifically bespoke courses. She reported that there was a huge range of staff, covering a varied of functions and from different professional backgrounds, within a health authority and so the joint working of the North East Learning Collective was also beneficial in sharing good practice, resources and courses where possible. Learning and development needs were very obvious for some of the professions covered in a health board, similarly to the Council's requirement to support to Registration standing for social workers and other care professionals.
- 6.4 In referencing both her experience of training provision in-house at RGU, and the research carried out nationally by CIPD, Anne Stevenson spoke of the role of managers, and the need for local awareness of what each individual service and member of staff required. Training should not be delivered in isolation, but be related to determined needs; be supported by encouragement and the monitoring of effectiveness, as well as continuous dialogue, between the line-manager and staff member. In addition to the formal processes of learning, such as courses and online learning, Ms Stevenson commended the use of team catch ups – over coffee or lunch – as an instinctive extension of the “water cooler” type of conversations which could be beneficial to sharing knowledge across a team, or organisation. It was, she felt, often the informal sessions which were most effective in encouraging an organisational climate of learning.

## **7. The role learning and development plays in staff recruitment and retention**

- 7.1 Officers reported that, whilst access to learning and development opportunities might play a role in staff recruitment and retention, there was no clear evidence of this. Assessment of leaving interviews, where conducted and recorded, was more likely to highlight resignations to go for bigger salaries, or for family reasons, than because of dissatisfaction with the access to learning and development. In a similar way, it might

be assumed the Council's approach to staff development might make it an employer of choice, in an often fiercely competitive labour market, but it was more likely to be one of many, rather than a stand-alone, factor in any decision to accept employment.

- 7.2 Assurance was given to the Committee that there was a process in place when a further level of management required to "sign-off" on decisions to refuse requests for specific training, if it were deemed not to be a priority for the requesting individual in terms of service needs. There were few occasions where this had been known to be invoked, so again it might be assumed that staff were generally content with the approval process for learning and development. This was confirmed by both Ines Teece of UNISON and Pat Flanagan of the EIS.

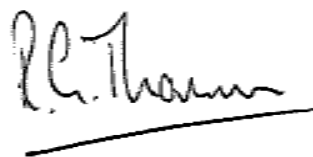
## 8. Thanks and invitation for feedback

The Scrutiny and Audit Committee would like to record its appreciation of the cooperation and assistance it received from internal and external witnesses.

Each investigation undertaken is a learning experience for the Committee. It would welcome any feedback or comments from participants or interested individuals on the investigation process and this report.



Cllr Gillian Owen  
Chairman, Scrutiny and Audit



Cllr Richard Thomson  
Vice-Chair, Scrutiny and Audit

**APPENDIX - INVESTIGATION PROGRAMME AND WITNESSES<sup>8</sup> HEARD**

<b>DATE</b>	<b>ACTIVITY</b>
9 September, 2013	<p style="text-align: center;"><b>Lead service briefing</b></p> <p style="text-align: center;">Laura Simpson, Head of Service (Human Resources and Organisational Development) and Paul Henderson, Learning and Development Manager</p> <p style="text-align: center;">Present: Cllrs Owen, Thomson, Aitchison, Farquhar, Ingram, Latham and Tait.</p>
11 September, 2013	<p style="text-align: center;"><b>ALDO (ABERDEENSHIRE LEARNING AND DEVELOPMENT ONLINE) PRESENTATION</b></p> <p style="text-align: center;">Richard Tucker, Team Leader, Employee Development) and Sharon Armet, Employee Development Officer</p> <p style="text-align: center;">Present: Cllrs Owen, Thomson, Duncan, Ingram, Shand and Tait.</p>
23 September, 2013	<p style="text-align: center;"><b>Leadership and Management</b></p> <p style="text-align: center;">Mike Healy, Team Leader, Leadership and Development</p> <p style="text-align: center;">Present: Cllrs Owen, Thomson, Aitchison, Cullinane, Ingram, Latham, Shand and Tait.</p>
25 September, 2013	<p style="text-align: center;"><b>Housing and Social Work</b></p> <p style="text-align: center;">Fiona Robertson, Staff Development and Training Co-ordinator and Sophie McKen, Employee Development Officer</p> <p style="text-align: center;">Present: Cllrs Owen, Thomson, Cullinane, Duncan, Farquhar, Ingram, Shand and Tait.</p>
25 September, 2013	<p style="text-align: center;"><b>Infrastructure Services</b></p> <p style="text-align: center;">Philip McKay, Head of Service (Roads and Landscape),</p> <p style="text-align: center;">Present: Cllrs Owen, Thomson, Cullinane, Duncan, Farquhar, Ingram, Shand and Tait.</p>

<sup>8</sup> Witnesses from Aberdeenshire Council, unless otherwise advised.

25 September, 2013	<p style="text-align: center;"><b>Councillors' Learning and Development</b></p> <p style="text-align: center;">Laura Simpson, Head of Service (HR&amp;OD) and Ann Williamson, Senior Practitioner, Leadership and Management</p> <p style="text-align: center;">Present: Cllrs Owen, Thomson, Cullinane, Duncan, Farquhar, Ingram and Shand.</p>
30 September, 2013	<p style="text-align: center;"><b>Chartered Institute of Personnel and Development/ The Robert Gordon University</b></p> <p style="text-align: center;">Anne Stevenson, Former Chair, CIPD (North East) and Teaching Fellow and Human Resources Management Group Lead, The Robert Gordon University</p> <p style="text-align: center;">Present: Cllrs Owen, Thomson, Aitchison, Cullinane, Duncan, Farquhar, Ingram and Shand.</p>
7 October, 2013	<p style="text-align: center;"><b>NHS Grampian</b></p> <p style="text-align: center;">Anne Inglis, Head of Organisational Development</p> <p style="text-align: center;">Present: Cllrs Owen, Thomson, Aitchison, Duncan, Farquhar, Ingram, Latham, Ross, Shand and Tait.</p>
10 October, 2013	<p style="text-align: center;"><b>Finance</b></p> <p style="text-align: center;">Alex Stephen, Corporate Finance Manager and Tina Jones, Principal Accountant</p> <p style="text-align: center;">Present: Cllrs Owen, Thomson, Duncan, Farquhar, Ingram, Shand and Tait.</p>
11 November, 2013	<p style="text-align: center;"><b>Trade Unions - EIS</b></p> <p style="text-align: center;">Pat Flanagan, EIS Joint Trade Union Secretary</p> <p style="text-align: center;">Present: Cllrs Owen, Thomson, Duncan, Ingram, Latham, Ross, Shand and Tait.</p>
14 November, 2013	<p style="text-align: center;"><b>The Improvement Service</b></p> <p style="text-align: center;">Dot McLaughlin, Organisational Development Programme Manager</p> <p style="text-align: center;">Present: Cllrs Owen, Thomson, Cullinane, Duncan, Farquhar, Ingram, Shand and Tait.</p>
14 November, 2013	<p style="text-align: center;"><b>Health and Safety and Wellbeing</b></p> <p style="text-align: center;">Pamela Bruce, Health and Safety Manager and Alison Mackay, Team Leader, Wellbeing</p> <p style="text-align: center;">Present: Cllrs Owen, Thomson, Cullinane, Duncan, Farquhar, Ingram, Latham, Shand and Tait.</p>



18 November, 2013	<p style="text-align: center;"><b>Fife Council</b></p> <p style="text-align: center;">Maureen Ward, Workforce Development Team and Roy Lawrence, Team Manager, Workforce Planning and Development (Social Work)</p> <p style="text-align: center;">Present: Cllrs Owen, Thomson, Cullinane, Duncan, Farquhar, Ingram, Latham and Tait.</p>
20 November, 2013	<p style="text-align: center;"><b>Workforce Strategy and Policy</b></p> <p style="text-align: center;">Karen Mears, Team Leader, Policy and Euan Proudfoot, Team Leader Workforce Strategy</p> <p style="text-align: center;">Present: Cllrs Owen, Thomson, Cullinane, Duncan, Shand and Tait.</p>
20 November, 2013	<p style="text-align: center;"><b>Unions - UNISON</b></p> <p style="text-align: center;">Inez Teece, Assistant Branch Secretary, UNISON</p> <p style="text-align: center;">Present: Cllrs Owen, Thomson, Cullinane, Duncan, Shand and Tait.</p>
20 November, 2013	<p style="text-align: center;"><b>Education, Learning and Leisure</b></p> <p style="text-align: center;">Sheila Marr, Quality Improvement Officer</p> <p style="text-align: center;">Present: Cllrs Owen, Thomson, Cullinane, Duncan, Ingram and Shand.</p>
5 December, 2013	<p style="text-align: center;"><b>Central Purchasing</b></p> <p style="text-align: center;">Craig Innes, Head of Procurement</p> <p style="text-align: center;">Present: Cllrs Owen, Thomson, Cullinane, Duncan, Ingram and Shand.</p>
5 December, 2013	<p style="text-align: center;"><b>Consideration of draft recommendations/ Lead Service Wrap</b></p> <p style="text-align: center;">Present: Cllrs Owen, Thomson, Cullinane, Duncan, Ingram and Shand.</p>
8 January, 2014	<p style="text-align: center;"><b>Consideration of revised recommendations with Lead Service Input</b></p> <p style="text-align: center;">Present: Cllrs Owen, Thomson, Cullinane, Duncan, Farquhar, Ingram and Shand</p>
5 March 2014	<p style="text-align: center;"><b>Consideration of draft report</b></p> <p style="text-align: center;">Present: Cllrs Owen, Thomson, Cullinane, Duncan, Farquhar, Ingram, Latham, Ross, Shand and Tait.</p>

