The University of Manchester Good Practice Guide to Learning and Development

Introduction

This is a draft document, designed to pull together good practice in learning and development from across the University, and highlight some of the opportunities available to colleagues. It has been created based on the experience of members of the Staff Development Framework Group, and from the feedback received from the previous Coremunicate discussion point. The final version will also:

- Feature an introduction from a member of the Senior Leadership Team
- Include Case Studies from colleagues' experience of working at the University
- Be available in both hard-copy and on-line versions, the latter of which will be managed by the Staff Learning and Development Team and kept up to date accordingly.

The finished product will of course look drastically different, as it will be graphically designed incorporating the use of images and University branding. The key feedback we therefore need at this stage is regarding the content, tone, and usefulness of the information contained within.

Any feedback will be gratefully received, and should be sent to
PSSstaffdevframework@manchester.ac.uk

Many thanks,

The Staff Development Framework Group

Employee life-cycle

We all need learning and development at different stages of our careers. Whether it's a refresher course on how to use Microsoft Excel, or a formal qualification on leadership and management to help you progress to the next level, learning and development should be a crucial part of our careers at the University. For the purposes of this guide, we have identified 6 critical stages of the *Employee life-cycle:*
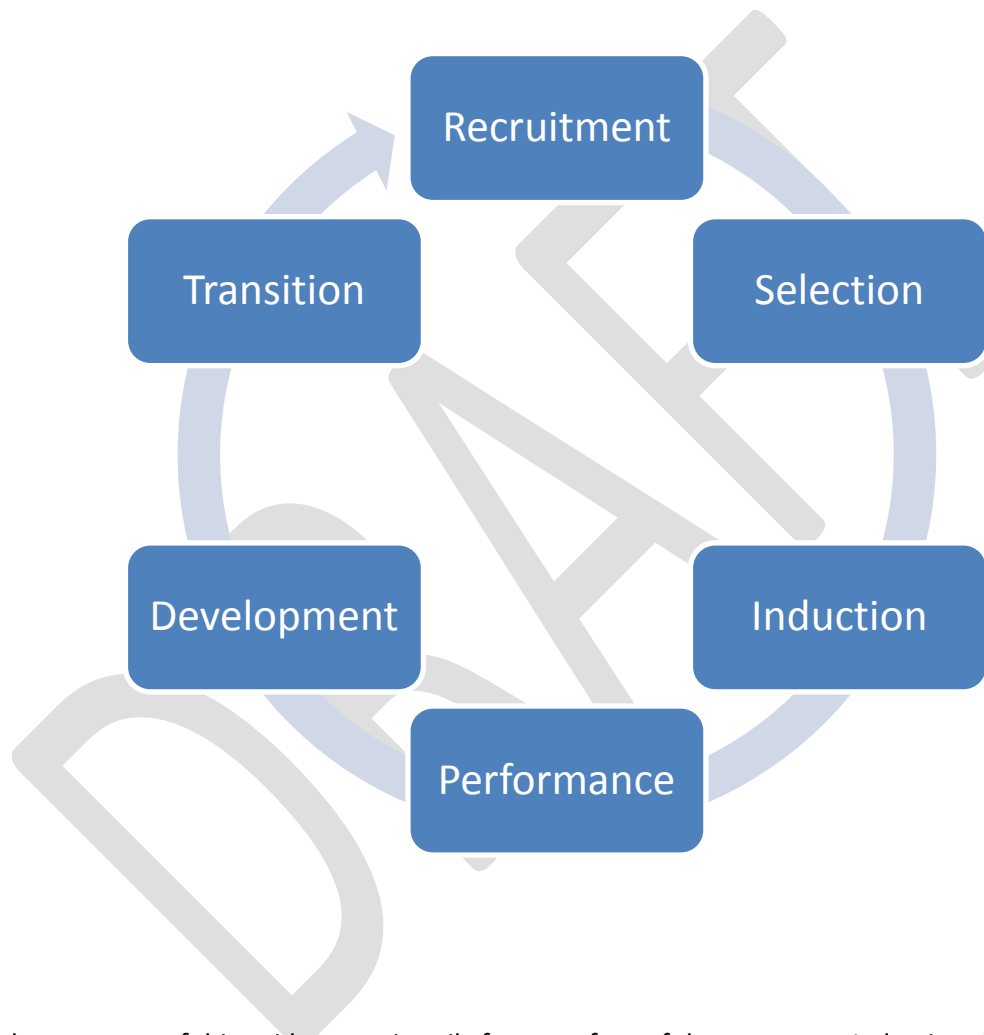
For the purposes of this guide, we primarily focus on four of these stages – Induction through to Transition, but also give you some suggestions on how learning and development should be considered as early as the Recruitment and Selection stage. Each stage poses different challenges, and has responsibilities for both managers and individuals. Throughout this guide, the responsibilities of both will be highlighted, but the key lesson to remember is **we are all responsible for our own learning and development.**

As an employee of the University of Manchester, you have access to a superb array of courses, resources, and learning and development opportunities. We would advise you to take full advantage of these to help you in navigating your own employee life cycle.

Recruitment and Selection

Training needs can be identified as early as the recruitment and selection of new staff. Here are some tips for how to embed good learning and development practice in your approach.

Managers

- When constructing person specifications, think carefully about the essential and desirable criteria. If you have listed a particular skill, qualification or attribute as **essential**, you are making a statement that you expect the candidate to possess a degree of proficiency in this area. If **desirable,** you may wish to consider what training could be offered to candidates to allow them to develop or attain this in future.
- Think about designing the recruitment process to test particular skills or attributes. If it is vital that someone possesses a good telephone manner, could you design an exercise to test this in the interview?
- Be prepared to discuss training and development opportunities in the interview, and ensure you maintain a good working knowledge of what can be offered at the University.
- As a manager you will no doubt want your new recruit to hit the ground running, so ensure you arrange essential training as soon as possible after they commence their role.

Individuals

- Carefully scrutinise the role you have applied for and be realistic regarding assessing your suitability for it. If you do not meet the essential criteria then you are unlikely to be shortlisted, but you can identify from the desirable criteria which areas you may need to develop if successfully appointed.
- Research yourself what learning and development opportunities might be available if you are appointed. It will impress the recruiting manager if you have thought about the tools or training you will need to be successful in the role.
- If relevant to the interview, ask what learning and development opportunities may be available if successful. This shows enthusiasm and commitment to role you have applied for, and gives you a head start on your personal development if appointed.

Further training courses available through Staff Learning and Development:

For Recruiting Managers

- Recruiting Staff at Manchester to PSS posts
- Recruiting at Manchester (Job Description and Person Spec)
- Equality and Diversity Issues

For Individuals

- Preparing for Interviews

Induction

Induction to the University and into a new role is absolutely vital for every member of staff. A comprehensive induction should ensure that the employee receives all the support they need to help them settle into their new role. The requirements are slightly different for new or transferring employees, but the end product is the same – **a fully supported and engaged employee with the tools they need to commence and flourish in their role.** See below for information and good induction practice for both managers and new or transferring staff members:

University Good Practice

- All staff receive a *New Staff Induction and Information Booklet* with their contract of employment.
- Induction checklists must be completed with all **new and transferring staff**. This includes a training and development plan, which should be completed soon after commencement of a new role (see checklists section).
- New employees should attend their University Welcome Event, a short session to introduce employees to the values and goals of the University.
- Some training courses are mandatory and should be completed soon after joining the University. These are:
    - Health and Safety online training (employees receive details by email)
    - Protecting Information online training
    - Data Protection online training
    - Equality and Diversity online training (http://www.staffnet.manchester.ac.uk/services/equality-and-diversity/training/diversityintheworkplace/)

- Consider any **re-induction** requirements for staff returning from any long-term absence from the University (returning from parental or sickness leave for example).
- All induction information can be found at: http://www.staffnet.manchester.ac.uk/employment/joining-the-university/induction/

Local Good Practice

- New and transferring staff should be given a thorough grounding in all local policies, practices and procedures by their manager or supervisor (use the induction checklists as a guide). Some areas produce a local induction handbook or guide covering the above.
- Don't underestimate the importance of a tour of the buildings and local environment – this is essential as part of the settling-in process.
- Ensure staff are made aware of any key contacts within and outside your department, for example managers, support services, estates contacts etc.
- You might consider allocating a more experienced 'buddy' or mentor to the new or transferring staff member. This provides an element of peer and social support which cannot necessarily be provided by managers or supervisors.
- Many departments run more informal induction lunches or workshops, to introduce new or transferring staff members to other colleagues in the department.

Probation

All new staff joining the University are subject to a **probationary period**. See below for some general good practice to navigate probationary periods successfully:

Managers

- A probation period allows you to assess whether the new recruit is suitable for the role.
- A robust induction and training and development plan (see Induction section) should ensure that the new recruit has the best possible opportunity to complete probation.
- Ensure that standards of performance, behaviour, appearance etc. are clearly explained during the probation period.
- Regular meetings at timely intervals (e.g. every 2 weeks) should be held during the probationary period to provide feedback and support. These meetings should be documented and filed.
- Early intervention is critical if a probationer isn't making satisfactory progress and you must be clear, open and honest about what the problem is, how they can improve and support available (e.g. Staff Learning and Development). At this stage you should consider taking guidance from your local HR Partner or HR Services.

Individuals

- The probation period is also for you to assess the suitability of the role in line with your own aspirations and requirements.
- If unsure about any aspect of your induction or training and development plan, challenge this with your manager – remember it is your responsibility to take ownership too.
- Prepare adequately for your probationary reviews, and reflect on your own development.
- If, for whatever reason, your manager decides to extend your probationary period, don't let this affect your confidence and work hard to achieve your objectives. Your manager clearly believes you are the right person for the job as they recruited you, so show that you are capable of the role.

These are the probation periods for newly appointed PSS staff:

Staff group	Probation period	Notice required by either party during probation period
Support staff Grades 1-5	3 months	1 week
Academic-related and Research staff Grades 6–8	9 months	1 calendar month

Redeployees do not have a probation period, but may undergo a 4 week trial period, during which time both manager and individual should decide if the appointment is suitable. Learning and development needs should be documented and monitored during this period.

Full guidance on probationary arrangements can be found at:
http://www.staffnet.manchester.ac.uk/employment/joining-the-university/probation/

Performance

Performance isn't a term to be afraid of - it's an ongoing part of our working life to ensure that the University's objectives are met and our people are supported to realise their potential. Performance should be reviewed, managed and rewarded on a regular basis:

Performance and Development Review (P&DR)

All staff working at the University should have a formal annual review with their line manager or relevant senior colleague. The **P&DR** is an opportunity to discuss your performance over the previous 12 months, and agree learning and development objectives for the future. You can use the P&DR to discuss any strengths, weaknesses, issues and aspirations with your manager, but the review needs both participants to prepare and engage with it to be successful. Further guidance and training on the P&DR process is available at:
http://www.staffnet.manchester.ac.uk/employment/training/personal-development/pdr/

Performance Management and Development (through regular 1-1's)

The outcomes of annual review, including progress against agreed objectives and learning and development opportunities should be discussed on a regular basis. Managers should aim to meet with their staff frequently (i.e. monthly as a minimum), to ensure that:

- Feedback can be given and received regularly (by both managers and individuals)
- Any issues can be addressed quickly before they have opportunity to escalate
- Support needs can be identified easily and appropriate steps put in place

Performance Management can be used to identify those who are performing above and beyond, and therefore used to identify appropriate development opportunities (see section on **Development**), as well as identifying those staff who need more support to be a success in their role.

Personal Development Plan (PDP)

It is recommended that all staff keep a **Personal Development Plan (PDP)**, to log development activity through the year. Personal Development is more than just attending training courses, and can cover anything from taking on new responsibility, mentoring a colleague, or joining a working group. A blank PDP template can be found at the end of this document, and at the back of the P&DR documentation.

Training undertaken through the Staff Learning and Development Unit is logged automatically on your *My Training and Development* record which can be accessed through:
http://www.staffnet.manchester.ac.uk/employment/training/

You can also use the templates provided under the **CPD (Continuing Professional Development)** section on **e-mentor** (see *Development* section)

Reward and Recognition

Good performance should be acknowledged. Perhaps you have completed a major systems development, or one of your staff members has received an email of praise from a student. Whatever the accomplishment, the University has a mechanism to recognise and reward it:

Thank you scheme

Our **Thank You Scheme** aims to create a culture and environment in which all staff can show their appreciation to any other member of staff through thank you cards. It also allows all members of staff to provide instant and spontaneous recognition to their staff for exemplary work all year round on an 'as and when basis', rather than using the other more formal mechanisms. Managers can also give gifts or arrange events in appreciation of special efforts by their team members. For more information see: http://www.staffnet.manchester.ac.uk/employment/benefits-rewards/reward-recognition/thank-you/

Rewarding Exceptional Performance Policy

Our **Rewarding Exceptional Performance Policy** awards additional pay to staff in grades 1-8 who make an exceptional contribution either to a one off task/project, or through a sustained exceptional contribution in their role. For exceptional performance, the reward is up to the value of one increment, and for sustained exceptional performance, the reward is advancement to the next point on the salary scale (or for those at the top of their scale, a contribution point).

Nominations are usually made by managers for individuals they believe merit this award. Individuals can nominate themselves, but are encouraged to discuss this with their manager. For more information see: http://www.staffnet.manchester.ac.uk/employment/benefits-rewards/reward-recognition/exceptional-performance/

Distinguished Achievement Awards

Our annual **Distinguished Achievement Awards** recognise outstanding contributions by staff, who can be nominated for awards in both individual and team categories. There is also a **General Distinguished Achievement Award** where none of the other categories are appropriate.

Other awards

There are also various awards supporting achievements relating to our core values and goals, such as the **Green Impact Awards**, **Social Responsibility** and **Volunteer of the Year Awards**.

Loyalty rewards

We also reward loyalty. Our Long Service Awards recognise staff achieving 25 and 40 years continuous service at the University, through an award of £400 or a weeks' annual leave.

We should all be aware of the reward and recognition schemes and when and how to apply for them. If we all said 'thank you' or 'well done' routinely, the University would be an even better place to work!

Development

The University of Manchester has an enviable number of events, schemes and resources available to develop staff. Development opportunities can be identified at P&DR's, regular reviews, or by changes in objectives, and are crucial to maintaining employee motivation and commitment. See below for some examples of what you can access as a manager supporting a team, or an individual looking to develop yourself:

Staff Learning and Development

As well as designing, delivering and administering a vast array of training and development events across the University, **Staff Learning and Development** provide bespoke development solutions to teams and departments through their highly experienced team of Staff Development Advisers. Managers and individuals alike should familiarise themselves with the services of Staff Learning and Development through their website at:
http://www.staffnet.manchester.ac.uk/employment/training/

Online resources

E-mentor is an online portal of over 4,000 different resources, including audio and video interviews with leading thinkers, bite-sized top tips on key subjects, interactive self-assessments and much more. Topics include communication, decision-making, managing teams and self-development amongst others. **Pansophix** is a range of online professional and personal development guides which can be worked through individually or in teams, covering diverse topics such as Customer Service, Interview Success and Time Management.

Both E-mentor and Pansophix can be accessed through:
http://www.staffnet.manchester.ac.uk/employment/training/onlineresources/

Coaching and Mentoring

Manchester Gold is our highly successful and unique career mentoring programme. It aims to develop staff across the University by linking them to the support of a more experienced colleague. This colleague will then act as their career mentor over a nine-month period. The scheme is ~~for~~ open to any staff member working at the University who would like help with their career development. Previous participants on the scheme have signed up to develop managerial or supervisory skills, to get a different perspective on a work-related problem or to develop specific skills to further their career.

Being a mentor also has benefits, and is great for developing coaching skills and enhancing your CV, as well as gaining satisfaction that you have helped a colleague develop their potential. For more information on this outstanding scheme, see:
http://www.staffnet.manchester.ac.uk/employment/training/personal-development/groups-networking-mentoring/mentoring/manchestergold/

The University also supports **One to One Coaching**, through our **Coaching Skills for Managers** workshop and more in-depth provision where an individual believes the services of an accredited coach can be useful for enhancing performance and supporting their personal and professional

development. Provision of this service is coordinated by Staff Learning and Development who can access the services of trained accredited internal coaches and (exceptionally) a register of approved external coaches. For more details of our One to One Coaching see: http://www.staffnet.manchester.ac.uk/employment/training/onetoonecoaching/

Hidden Development opportunities – job shadowing and secondments

If you have an aspiration to work in another department or functional area, job shadowing or taking a secondment can support you. **Job shadowing** is where an individual occasionally observes or works alongside a colleague to gain an insight into their role or department. A **secondment** is a more formal arrangement, usually involving a full-time or part-time temporary transfer to another area or department. Both opportunities can help you learn new skills, knowledge and contacts which might assist in future career development.

Accredited courses and qualifications

In addition to in-house learning and development courses, the University can support staff in achieving recognised qualifications in areas such as leadership and management and health and safety. See the Staff Learning and Development website for further details.

Professional Bodies

Joining a professional body organisation can help to enhance your career, access external sources of training, and develop networking opportunities with others working in higher education. The foremost organisation for staff working in higher education administration and management is the **Association of University Administrators (AUA)**, whose head office is based here at the University. The AUA has its own good practice guides to assist learning and development, runs regular conference and networking events, and has developed a CPD framework for staff working in the sector. See their website for more details: http://www.aua.ac.uk/

University of Manchester Library Resources

As a staff member of the University you have full access to the Library's impressive catalogue, which can aid in your training and development. Books, journals and resources covering topics such as HR practice, self-development and career planning are available at your fingertips. For the full catalogue, see the Library's website at: http://www.library.manchester.ac.uk/

Wellbeing and work-life balance

Self-management is a vital part of achieving your potential through learning and development. The University fully recognises this, and provides a range of benefits. For your physical and mental wellbeing, you can access a range of facilities with discounted rates for staff, including classes at the **Sugden Sports Centre** and classes and activities through the **ACTIVE Manchester** and **SPORTICIPATE** programmes, many of which are completely free. Our new **Wellbeing rooms**, located in the Simon Building (no. 59 on the Campus Map), offer a space for staff to exercise, relax and rejuvenate. Furthermore, if you're looking for a way to use your lunch hour, or wind down after work, don't forget about our assets such as the **Manchester Museum**, **Martin Harris Centre** and **The Whitworth,** which play host to a range of exhibitions, concerts and events.

Transition

Once you have made the most of the opportunities available to develop, you may now be ready for the next step of your career – transition. Here are some tips for managers and individuals for successful transition.

Managers

- By regularly meeting your staff, you should be aware when they are ready to achieve the next level in their careers.
- Support your staff in developing their careers using all the guidance contained in this booklet. Your support and advice will be invaluable, even though you might not want them to leave your department!
- Consider if your staff would benefit from support with applications, practice tests and mock interviews. Practice makes perfect.
- Succession plan. Individuals can and do move on at any time, so ensure that you have plans in place to cover workload.

Individuals

- Self-awareness is key, are you ready to make the next step up in your career? Feel empowered to discuss this openly and honestly with your manager.
- Consider all options open to you. Do you want to progress in your own department, or would you benefit from a change? Would a 'sideways' move help you to move up the career ladder in future?
- Access all the support available. Your manager or supervisor is there to help and advise you, as are the Staff Learning and Development team.
- If you are successful in obtaining a new role, congratulations! Ensure however that before leaving your present role you finish any outstanding tasks, complete a handover of any ongoing work/projects and leave on good terms with everyone.

Further support, advice and information on career transition is available through:

- **Ementor** has an excellent section on Career Management
- **Pansophix** has useful guides on Interview Success, Goal Setting, and Self-Management, amongst others.
- **Staff Learning and Development** have a dedicated section on their training catalogue: http://www.staffnet.manchester.ac.uk/employment/training/personal-development/career-development/
- Though primarily aimed at students, our excellent Careers Service has a range of resources you can access through their website at: http://www.careers.manchester.ac.uk/

Good luck with your learning and development and go ahead and make the most of Manchester!

Checklists

Supporting Personal Development – Assessing your own learning and development needs

This short questionnaire asks you to assess your own learning and development needs. Answer Yes, No or Unsure to each question:

Assessing your own Learning and Development needs	A. Yes	B. No	C. Unsure
I had a comprehensive induction to my role			
I feel that I have all the necessary tools required to do my job effectively			
I know exactly what is required of me in my job			
I am always aware of new policies and procedures I should be following in my job			
I have had a Performance and Development Review with my line manager in the last 12 months			
In my PDR I agreed clear learning and development objectives with line manager			
In regular meetings with my line manager, we regularly discuss my learning and development			
After completing any learning and development, I seek out opportunities to put that learning into practice			
I know exactly where to look to find out the latest learning and development opportunities			
I regularly encourage colleagues to take up learning and development opportunities			
I feel learning and development is important to ensure I do my job effectively			
I have a Personal Development Plan (PDP) and keep this updated where possible			

Mostly A's. You are taking responsibility for your own learning and development and you should continue to engage in learning and development activity with your line manager's support.

Mostly B's or C's. You would benefit from having a conversation with your line manager regarding your learning and development and finding out more about the opportunities available to you the University.

Supporting Staff Development – Key Management Tasks

This short questionnaire asks you to consider the types of things managers might do to support the learning and development of individual staff and their teams. For each of the key management tasks indicate whether this is something you do:

A. As a matter of routine
B. Sometimes, but could do it more often or systematically
C. Don't do it at all

If you don't directly manage staff, then consider this in relation to your manager and department.

After you've completed the questionnaire have a look at the items against which you have ticked column B or C. Are there any things you need to start doing or do more systematically?

Management Tasks Supporting Learning and Development	A. Always	B. Do(ne) sometimes	C. Don't do at all
All staff new to my area have a formalised Induction Plan			
When a new starter joins my area I spend time with them reviewing any specific training they need for the job			
During the induction period I regularly schedule time with new starters to check how things are going			
I appraise/review all staff in my area annually			
During the annual appraisal I review with staff any development they have undertaken in the last year and how this has helped them in their job			
As a consequence of appraisal/review my staff have a personal development plan			
I agree with staff a range of different methods of developing their skills in addition to training courses			
I encourage staff to undertake new tasks, projects or delegated work as a means of developing their skills and potential			
In addition to annual reviews I regularly carry out shorter mini reviews with staff			
I spend time with staff after specific development activities, reviewing what they have learned and how this can be applied in their job			
On a day to day to day basis I take time to give staff both positive and developmental feedback on aspects of their day to day work			
I regularly lead my team in reviewing its strengths and areas for team development and take action as a result of this			
I review how future developments in the work and plans of my department will impact on the skills required of staff and put plans in place to develop these			
I consider the resourcing of staff development in terms of staff time, finance, and general workloads when thinking of future development plans			
I retain individual training and development records in order that I know pretty well the skills and potential of my staff			
I discuss staff development opportunities and possibilities regularly at team meetings and get-togethers			
I encourage members of my team to share their learning from particular events with other colleagues			

I have a reasonably structured plan of on the job training for members of my team or area			
I encourage staff to apply their learning from development by questioning existing ways of doing things and systems			
All staff new to my area have a formalised Induction Plan			
When a new starter joins my area I spend time with them reviewing any specific training they need for the job			
During the induction period I regularly schedule time with new starters to check how things are going			

New Staff Induction Checklist

These two forms – the New Staff Induction Checklist and the Induction Training and Development Plan – are designed to ensure the employee receives the information and support required to help them to settle into their new role.

To be completed by the employee with the line manager.
 A copy of the completed form should be kept by the line manager.

Name	
Job Title	
School/Department	
Start date	

First day – HR set up	Date	Initials
Visited HR Services - completed starter documentation and ID checks		
Provided bank details		
Discussed pension options, understands Pension Choice and auto-enrolment requirements		
Obtained Staff ID card		
Visited Occupational Health (if required to)		
Obtained copy of New Staff Induction and Information pack (sent with appointment letter)		

First day – Department set up	Date	Initials
IT and email account set up – discussed IT Acceptable Use SOP for staff		
Telephone set up		
Tour of building and facilities		
Introduction to work colleagues		
Introduction to key School/Faculty/Department contacts		
Obtained names and contact details for key contacts in HR, IT helpdesk, etc		
Completed Health & Safety Induction Checklist		

First week – Department set up	Date	Initials
Discussed working hours, start and finish times, breaks		
Shown facilities for breaks, meals, etc		
Discussed school/department customs & practices, dress code, communication channels, social activities		
Discussed job description, requirements and expectations		
Discussed policies and practices of particular importance to the area of work/school/faculty/department		
Discussed probation arrangements, expectations, objectives and review dates		
Identified initial training needs and completed Induction Training and Development Plan		

Explained system for Performance Development Reviews and Personal Development Plans		
Explained sickness reporting procedures, who to contact, by when		
Explained how to book annual leave, departmental rules / cover arrangements		
Read and understood Discipline and Grievance Procedures		
Read and understood Equality and Diversity Policy		
Discussed the University's vision - Manchester 2020, understood the key objectives and the roles of key staff in the school/department		
Attended the University Welcome Event (employee will receive booking details by email)		
Completed the Equality & Diversity online training		
Completed the Protecting Information and the Data Protection online training		
Completed the Health & Safety online training (employee will receive details by email)		
Read and understood the University's financial rules and regulations and the Code of Conduct for University staff (Ordinance XVIII)		
Read and understood the University's Fraud Response Plan		

Induction Training and Development Plan

As a new member of staff or as someone who is changing roles you may have training and development needs to help you fulfil your potential in the new role. This form should be completed through discussion with your line manager and an agreed action plan put in place.

Name	
Job Title	
School/Department	
Start date	

Identify any training needs below, together with agreed actions to address them	Target completion date	Review Date
Specific to the Role		
Organisation skills, Administrative, IT		
Leadership, Management/Supervisory		
Customer Service		
Health & Safety		
Other		

	Name	Signature	Date
Line Manager			
Employee			

Personal Development Plan (PDP) template

Name:
Unit/Division:
Contact Details:
Date:

Development or Training Need	Priority High Medium Low	Link to policy, strategy or individual objectives	Details of any cost	Comments

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