

REPORT OF THE PERSONNEL MANAGER

CHANGES TO THE POST ENTRY TRAINING SCHEME

1. PURPOSE OF REPORT

- 1.1 To request that Members of the Employment Committee review the proposed changes to the Post Entry Training Scheme (PET) as part of the Council's Budget Reduction Programme.

2. RECOMMENDATION

- 2.1 That the Employment Committee approves the changes to the PET scheme for new entrants to the Scheme
- 2.2 That the incremental awards currently given to employees when qualifying are removed.
- 2.3 That the one off lump sum payment of £300 is removed.
- 2.4 That Clause 6.iii in the scheme is updated to read "An employee who leaves the employ of the Council while still studying for a qualification will be required to repay all PET costs incurred while studying this qualification."

3. Details of Report

- 3.1 The PET scheme was created to encourage employees to develop themselves and study for relevant qualifications. It provides a framework for financial assistance, and to recover costs should employees decide to leave.
- 3.2 Currently once successfully qualified, a financial award is made of one increment on the employee's current grade, or if they are at the top of the grade, a one-off lump sum payment of £300.
- 3.3 We currently have 8 people part way through their PET studies. Of those likely to complete their studies this year it will cost **£2036** in final awards. Half are at the top of their grade and therefore would receive a one off payment of £300, but others would receive incremental increases of up to £903.
- 3.4 Some managers have decided to offer training to employees but not to go through the PET route because they have no budget for the PET increment at the end.
- 3.5 Another issue is that of recouping costs for leavers who are still studying. The current scheme rules provide an anomaly, when comparing someone who leaves while still studying (to repay only the last 12 months fees) to someone who leaves just after qualifying (repay full amount, on a reducing scale over 2 years). So if an employee leaves our employment just before finishing a 3 year course, they will only pay the last 12 months fees, where as they would pay back almost the full amount of fees paid if they leave 3 months after qualifying. This is inequitable and does not encourage employees to stay beyond their qualification.
- 3.6 Given the current financial climate, it is time to review the incremental award for PET success. Many people are not even aware of this award when they sign up to PET; their concern is to be able to pursue their studies. Please find at **Appendix A** a copy of the revised Scheme incorporating the recommendations set out above.

4. Consultation

4.1 Employee Representatives have been consulted with regard to these proposals

5. Financial Implications

5.1 Employees will continue to be supported for agreed training & development with the fees being paid by Lichfield District Council.

5.2 Based on the current numbers going through the scheme we would look to a saving of approximately £1,200 per annum by implementing the revised procedure.

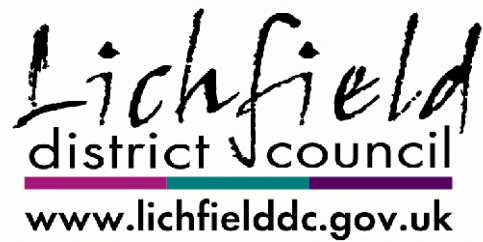
6. Human Rights Issues

6.1 None identified

7. Risk Management Issues

7.1 The risks are identified below.

Description of Risk	Likelihood/impact	Risk Status	Countermeasures
Stopping the increments for completing PET may reduce the numbers of employees wishing to go onto the PET scheme.	Low/Low	Tolerable	The implications have been considered and present a low risk to the Council overall.



Post Entry Training Scheme Booklet

Lichfield District Council

POST ENTRY TRAINING SCHEME

1 INTRODUCTION

Lichfield District Council recognises that its employees are its most important resource and that the level and quality of the services it provides are closely related to the skills, knowledge and informed actions of those employees.

The Council is committed to the investment of time and financial resources in support of the training and development of its employees, enabling them to make a positive contribution to the effectiveness of the Council's services and develop their potential within the context of the Council's employment opportunities.

Post Entry Training (PET) is a scheme which provides financial assistance for employees following an appropriate and recognised qualification course, whether at college, by assessment in the workplace, or by other recognised means.

The Scheme is funded from the training budgets of individual services.

2 ELIGIBILITY

- a) PET must be based on the business needs and linked to their Personal Development Plan.
- b) An application on a PET form must be submitted for approval by the Service Manager, to the Training & Development Officer and the Personnel Manager **before** the start of the course, and **before** any fees are paid.
- c) In cases where a new employee has already embarked on a course of study approved by the Service Manager, the application form must be completed as soon as the employee takes up the post.

3 SELECTION OF COURSE OF STUDY

- a) The course of study will lead to a recognised qualification. Advice on choice of qualification may be sought from the Service Manager concerned and from the Training & Development Officer.
- b) Criteria for the selection of a course will include relevance [see (d) below], cost and convenience. Some compromise between the preferences of the individual and the requirements of the service may be necessary, in matters of both syllabus and timing: while day or half day release is often possible, attendance at evening sessions may be required.
- c) The method of study may involve attendance at college, distance learning, workplace assessment, or a combination of these.
- d) The course will be relevant to the post held by the employee or to the potential career development likely to arise out of the post and must be linked to the needs of the business and identified through the Personal Development Review process.(PDR). **Under normal circumstances qualifications needed to effect a career change, or otherwise unconnected with the employee's current career path, would not be supported financially by the Council.**

4 LEAVE OF ABSENCE

- a) Paid leave of absence will be granted for college attendance on one full day per week, one or two half days per week, or one or more block releases, dependent on the requirements of the agreed course [but see (d) above].
- b) Employees are also expected to commit sufficient of their own time to achieve a satisfactory result.
- c) No extra payment will be made (other than travel, and subsistence where appropriate) for attendance at evening or weekend sessions.
- d) Study leave before examinations will be available (**up to** 5 days leave of absence with pay) by agreement with the Service Manager concerned. The number of days will be in proportion to the duration of the examinations; normally for a single examination one or two days will be considered to be sufficient.
- e) Examination leave of absence with pay will be granted for all examinations including vivas or other interviews and approved re-sits.

5 FINANCIAL ASSISTANCE

All payments under the Post Entry Training scheme are made from the training budget of the service involved. There is no central budget for PET.

[a] Fees

- i. Tuition Fees and Examination Fees will normally be paid in full. Under certain circumstances it may be agreed that the Council will support only a proportion of the Tuition Fees. Advice on this may be sought from the Training & Development Officer or the Personnel Manager.
- ii. Registration Fees and Exemption Fees will be paid in full.
- iii. Associate or Student Membership of a professional body (where this is a requirement of the awarding body or college) will be paid in full.
- iv. The cost of the first re-sit of one or more papers will be paid in full. Subsequent re-sits will be supported at the discretion of the Service Manager concerned.
- v. Other incidental fees which are a requirement of the course of study will be paid in full.

[b] Other Expenses

- i. Typing and binding of a thesis or extended essay should be carried out by the student, but the cost of any necessary specialised professional finishing should be discussed with the Service Manager with a view to possible re-imburement.
- ii. Standard items of stationery such as A4 pads should be requested from the stock of the Service concerned. The cost of unusual items of stationery **which are essential for the course** will be re-imbursed: receipts should be attached to the claim form.

[c] Text-Books

- i. Students purchasing their own books will be re-imbursed in full for a reasonable number of books, *up to* a total value of £200, which may be retained within the service which paid for them, either at the end of the course or by agreement at a later date. Books should be loaned from libraries where possible.
- ii. The cost of “consumable “ texts which are revised annually, such as the ACCA study texts, will be reimbursed but the texts may be retained by the employee. To avoid confusion, the Service Manager and/or the Training & Development Officer should always be consulted as to the status of such items.

[d] Travel & Subsistence

- i. Travel to college from work and to work from college will be re-imbursed at second class bus or train rates.
- ii. Travel from home to college or from college to home, where this is greater than the normal travel-to-work distance, will be re-imbursed ***less the normal travel-to-work distance/costs***.
- iii. In either of the above cases, where it is impracticable to use public transport, payment will be made at the **Casual User (after 8,500 miles)** mileage rate currently in force. Claims should be made on a separate claim form and clearly marked as Post Entry Training. Home-to-work miles should be deducted.
- iv. When residential accommodation is being provided for a block of training, travel expenses will normally be re-imbursed for only one return journey. However, if daily travel is preferred by the student, **and the accommodation costs are waived or returned to the Council**, daily journeys will be re-imbursed as above. Where no such flexibility is available, the extra cost of daily travel must be borne by the student.
- v. In the case of day release or evening courses, the cost of meals will **NOT** normally be re-imbursed. However, there may be exceptional circumstances in which extra costs are inevitable; and if extra expenses are *necessarily* incurred over and above an individual’s normal daily expenses, consideration will be given to a claim for re-imburement.

In these circumstances, employees wishing to claim re-imburement for meals are expected to use the college cafeteria if available, whenever this is cheaper than the alternatives, unless the tutor takes the group to another location

Examples of circumstances in which re-imburement would be acceptable include cases where packed lunches are not allowed on the premises; or the course includes a networking session over lunch, whether formally stated or by custom. In such cases line managers may use their discretion to pay these costs.

- vi. In cases where subsistence is re-imbursed, the following guidelines should be followed:

Full day:	Lunch and tea
Afternoon and evening:	Tea and evening meal
Evening only:	no subsistence unless under exceptional circumstances

- vii. In the case of block release or a residential course where subsistence is *not* included, re-imburement will be considered. Whenever possible the terms of this re-imburement should

be agreed with the Service Manager before the start of the course.

viii. Receipts for all expenditure are required and should be attached to the claim form.

ix. All claims and invoices should be passed to the line manager in the Service concerned to be considered for payment.

6 CONDITIONS OF ASSISTANCE

i. The continuance of facilities under the PET Scheme will depend on the satisfactory progress of the employee concerned.

ii. Where a student **without good reason** fails to sit for an examination, fails to show satisfactory progress, has not attended classes regularly or discontinues their course, the Council will withdraw the facilities granted under this scheme and may require the refunding of such proportion of the costs as may be deemed appropriate.

Where the course is discontinued due to long term ill health or maternity leave, the repayment of fees may be waived.

iii. An employee who leaves the employ of the Council while still studying for a qualification will be required to repay ALL PET costs incurred while studying for this qualification.

iv. An employee who leaves the employ of the Council after qualifying will be required to repay a proportion of the costs of their qualification which will depend on the length of post qualification service. Employees are expected to remain with the Council for 2 years after qualifying. Therefore an employee leaving after 6 months would be required to repay three-quarters of the support they had received; after 12 months, half the amount, and so on, calculated on a monthly basis.

v. No claim for the refund of financial assistance will be made against the estate of an employee who dies in service.

vi. No claim will be made against any employee who is made compulsory redundant.

vii. No claim will be made if an employee discontinues at the request of the Council.

viii. The signing of the PET application form constitutes an agreement to these terms and conditions and constitutes authority to make deductions from the employee's salary, or from any monies due to them from the Council, of the sums referred to above, should the stated conditions arise.

ix. The above conditions apply even when the employee is taking a post within another local authority.

7 REVIEW

This Scheme will be reviewed regularly and Lichfield District Council reserves the right to make such amendments as are from time to time deemed necessary. Any such amendments will not affect agreements in force at the time of the amendment.

Date of this Revision: June 2011