



The
Get Skilled
Workbook

How to create a learning and development
plan for a third sector organisation

SKILD
Skills and Knowledge for Local Development

 **navca**

Welcome to Get Skilled!



SKILD is a learning project for people who give hands-on support to local third sector groups and organisations. We're publishing this workbook for people who are working with local groups; in particular, groups needing to develop a strategic and realistic approach to learning.

The Get Skilled workbook describes a simple process to identify and clarify the learning and development needs of small and medium sized groups and organisations. It has logical worksheets and instructions which should make the process organised and straightforward.

If you are a development worker, how you use this workbook is up to you. It will depend on your judgement, the culture and capacity of the organisation, and your working relationship with it.

You may choose to act as a facilitator and lead the review process. Or you may think it's more appropriate to explain the process, photocopy the worksheets and hand them over (probably to the manager or team leader). You can offer to help out at different stages, if needed.

Don't be daunted by the number of worksheets. The idea of them is to gather as much relevant information as possible in order to do a thorough and meaningful job. However, they are designed to be used flexibly. Think about adapting them – or even designing new ones – to suit a particular organisation. You can follow the process formally, or simply use the worksheets to record a workshop or away day. There are examples of how the worksheets might be filled in throughout the workbook.

If you are working with an organisation on PQASSO or another quality standard, then it's well worth looking at how the two processes fit together.

If you are a development worker and this has made you think about your own learning needs, have a look at the SKILD framework at

www.skild.org.uk

Why should an organisation have a learning and development plan at all?

Training and learning for the third sector has often been haphazard, erratic and constrained by budgets and pressure of work. Funders' and users' expectations are rising, staff turnover is high, and recruitment for some jobs is a problem.

Skills shortages can constrain performance. Many organisations include training as part of their business plan, but only a limited number follow it through in a systematic or formal way.

People are critical to an organisation's success. Skills development and other support are essential if people are to achieve what an organisation asks of them. Learning and development should form the core of any strategy. When organisations don't apply learning and development based on a clear understanding of the people they rely on, or don't integrate it properly into other key strategies and processes, then their ability to be effective is compromised.

Learning and development in the third sector

Human resource development, training and learning are crucial for both service quality and organisational success. If an organisation is going to achieve its objectives, and deliver the results it expects, it is imperative that people are equipped to do the job asked of them.

An organised approach ensures that

- resources are spent where they will provide most benefit
- everyone's needs are considered
- learning and development opportunities suit the way individuals learn
- learning and development plans are integrated into other plans
- there is a wide range of learning methods
- skills are developed to meet organisational changes and challenges
- strategies balance the individual's aspirations and needs against the organisation's needs and priorities
- there is equal access to learning and career development opportunities.

Getting it right means providing learning and development opportunities that meet the organisation's needs for shifting patterns of skills, plus everyone's agenda for personal development.

A learning and development plan

The purpose of a learning and development plan is to

- ensure that the skills and capabilities necessary to deliver the organisation's objectives are present or that any skill gaps are identified
- identify training, skill development or other approaches to fill those skill gaps
- identify everyone's personal or career development objectives and try to integrate them into the learning plan.

A plan must be based on the organisation's objectives and some understanding of current performance, of both the organisation and of each person involved.

A plan should

- integrate learning and development into other plans
- include induction, skill development and personal development
- respond to planned or anticipated changes
- identify each individual's personal or career development aspirations
- prioritise both individual and organisational objectives

- identify the most appropriate learning opportunities and tools
- allocate budgets
- recognise the time cost of development
- provide equitable access to learning and development
- assess the impact of learning.

A strategic approach should avoid learning decisions being driven by short-term responses to organisational problems or crisis, the demands of articulate or powerful individuals, or as response to poor performance. It should ensure that sufficient resources are provided so that expectations of performance are adjusted.

A learning and development policy

This policy should form part of the pack provided to all members of staff, along with their contracts and terms of employment. It could describe

- the organisation's commitment to human resource development
- how the organisation ensures that access to learning is non-discriminatory
- the organisation's induction practices
- a commitment to provide learning as part of

- any major change proposal or programme
- a scheme to provide a small number of learning days or budget to each member of staff for self development
- budgets available to buy information or attend conferences, networking or other ways of keeping up to date
- arrangements for payment for membership fees of professional bodies or support organisations
- the principles by which long-term or academic courses are supported, and how people are selected to receive support
- any requirements to attend training, or register for external accreditation such as NVQs, which form part of the contract or are normal working practices.

The business case

For small organisations, working to tight budgets under pressure from funders and with a strong commitment to their clients, users or members, the cost of a learning and development plan may seem to be expensive.

This is relatively easy to justify in terms of human resources development, but it can also be justified in terms of organisational

and financial results. Making the business case for learning and development converts expenditure into investment. Identifying and quantifying the cost and the benefits makes the business case.

Some costs may include

- time to review skills and develop the plan
- time to mentor, support and develop skills at work
- training costs
- providing cover for people who are away from work
- support and time to put learning into practice.

Some benefits may include

- measured improvement to the service provided
- time saved supporting people
- improvements to deadlines
- time saved sorting out problems
- increased confidence and satisfaction
- reduced complaints
- better induction and integration of new people.

Keeping up the momentum

A constantly changing policy environment and increasing competition for funding may stimulate a culture change in an organisation. We all need to learn continuously both formally and informally. A combination of empowered and articulate workers, operating in a delegated management framework is essential. Many small organisations in the third sector already have this characteristic.

The review process in this workbook could form the basis for Investors in People, a framework to assess and develop learning needs. Its mechanisms ensure that staff are involved in the planning process, communication is effective and that training and development needs are achieved.

Putting your money where your mouth is

SKILD's learning needs analysis showed that a major barrier to accessing learning is money. So although it is important to specify that resources are available to cover learning and development needs, it is crucial that organisations actually include realistic and thoroughly-costed figures in budgets. Some third sector organisations have included an extra 7–10% of salary towards staff's learning and development costs, in a similar way that pension contributions are calculated.

The workbook

Introduction

This workbook will help you to clarify the learning and development needs of an organisation.

You can use this workbook as part of an annual review process, to help with the human resource strand in business planning, or to meet a quality requirement.

The assessment process has four stages:

Stage 1: collecting information that you already have

Stage 2: investigation

Stage 3: identifying skill gaps

Stage 4: putting together a training plan

There is a worksheet or a group of worksheets for each stage. Make copies of the worksheets, adapt them, or design your own to suit an organisation's particular needs.

Two routes

The workbook has two routes to review learning and development needs. The basic route can be done quickly and will not take too much time. This route is fine for smaller organisations that

- are informal in the way they operate
- are not facing any major changes
- have only a small number of paid staff, or perhaps none at all
- need to do a review quickly.

The basic route has a much simpler Stage 2. Exclude worksheets 4 & 5.

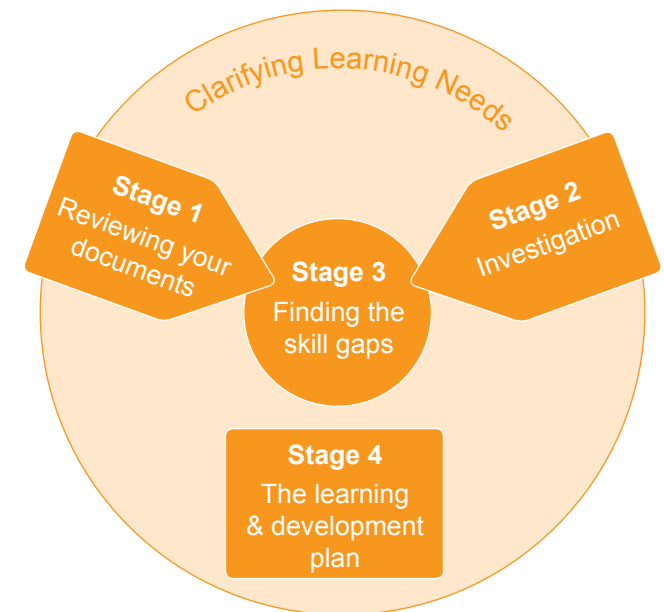
Use the more detailed route if an organisation

- is larger, with formal job roles
- is facing a major change or challenge
- is developing new services, extending existing ones or targeting new users
- is employing new staff or changing people's roles
- has already identified human resource problems.

On this route you may need to do many of the steps in more detail, and include all the worksheets in Stage 2.

Doing the assessment

The basic route can be done fairly simply. Stage 1 could be done easily by one person, perhaps in an afternoon. It is a matter of collecting information from documents and putting it all together.



Stage 2 may take longer, but you can ask people to fill in the worksheets themselves, or do the whole process at a regular, or special meeting.

The detailed route has the same stages, but will need more time.

In both cases the review process should be participatory. It should be based on people's own judgements of their

- current performance
- own skill needs
- view of how their role will develop
- perception of the future of the organisation.

Who is involved?

Think about who to include. Whose skills are important to the organisation?

- Paid staff
- Management committee members
- Volunteers

The workbook has been designed to support someone facilitating the review process. You might be a development worker from a local

infrastructure organisation – or a member of staff or from the management committee.

The worksheets are designed to be used flexibly. Adapt them to suit the organisation's specific needs, or design new ones. You can follow the process formally, or simply use the worksheets to record a workshop or away day.

Adapt the process to suit the organisation. Think about your own role, and the way you work with everyone else involved. How will you respect them and the information they may provide? Some information should remain confidential, but important issues will need to be shared. Be sensitive to the culture, life experience, expectations and background of the individuals.

The range of skills

Think about all the skills involved in the work that the organisation does. Skills can be divided into

- occupation or service-specific skills and knowledge, for example
 - caring skills
 - dance
 - knowledge of benefits regulations

- translation
- generic or key skills, for example
 - communication
 - problem solving
 - using computers
- personal qualities, for example
 - commitment
 - assertiveness
 - self-reliance.

The way that organisations work in the third sector often requires particular skills to participate in the organisation

- self managing skills
- team and group working
- contract management
- project management
- skills to keep pace with change

Learning and development

Think creatively about how to improve skills, create development opportunities or cover skill gaps. Going on short courses can be useful, but there are other methods including

- on the job training from colleagues
- mentoring with another colleague from inside or outside the organisation

- networking
- action learning sets with the help of a facilitator
- support groups
- self-managed learning (for example, online learning).

The learning and development plan will need to be agreed at a staff or management committee meeting. Make sure that any expenditure is properly integrated into the budgets.

Think about how you are going to support the implementation of learning and monitor the effectiveness of the training.

There may be four parts to the proposals that result from this process

- the learning and development plan
- individual development plans
- a staff development policy
- suggestions for non-training proposals to support and enhance the implementation of learning.

The worksheets

There are nine worksheets and a checklist.

Checklist

- Worksheet 1** Looking at information that you already have
- Worksheet 2** Skills checklist
- Worksheet 3** Personal review
- Worksheet 4** Other indicators
- Worksheet 5** Job analysis
- Worksheet 6** Identifying skill gaps
- Worksheet 7** The learning and development plan
- Worksheet 8** Individual development plan
- Worksheet 9** Implementation and review



The checklist

	Basic route	Detailed route	Notes
	▼	▼	▼

Stage 1: Receiving documents

Worksheet	Basic route	Detailed route	Notes
Worksheet 1 Looking at information	✓	✓	Need to improve ways to measure ourselves

Stage 2: Talking to people

Worksheet	Basic route	Detailed route	Notes
Worksheet 2 Skills checklist	✓	✓	Bit complex - make individual next time
Worksheet 3 Personal review	✓	✓	OK
Worksheet 4 Other indicators		✓	
Worksheet 5 Job analysis		✓	

Stage 3: Finding the skill gaps

Worksheet	Basic route	Detailed route	Notes
Worksheet 6 Identifying skill gaps	✓	✓	Did this at our annual review meeting

Stage 4: The learning and development plan

Worksheet	Basic route	Detailed route	Notes
Worksheet 7 The learning & development plan	✓	✓	OK
Worksheet 8 Individual development plan	✓	✓	Really useful
Worksheet 9 Implementation & review		✓	Not done yet

Looking at information that you already have

Reviewing documents

Start by reviewing documents, plans and policies that the organisation already has. They should contain information to help set the agenda. Look at

- mission statement, or statement of purpose
- business plan, development plan or service plan
- reports to management committee or funders
- performance data
- minutes from review meetings or away days
- consultation with users, members or communities, and analysis of complaints or comments.

Use worksheet 1 to analyse all this information.

Strengths and weaknesses

Review the way the organisation works.

- Identify the strengths and weakness of the organisation. Make them specific, and try to be as honest as possible.
- List the important ones on the worksheet.

How can you use the strengths to improve everyone's skills? In which areas can training and development help?

Specific objectives

List the main specific objectives for next year. Will training or development be necessary to achieve these? Think about all paid and unpaid workers, volunteers and management committee members.

Changes

Developing people's skills is critical if the way you work or the things that you do change. If the organisation faces major changes, think about using the more detailed job evaluation process described in worksheet 5.

Think about

- new services or changes in the work
- people doing different jobs or taking on new roles
- new staff or management committee members
- different kinds of people using the organisation
- new systems or different ways of working.

Would development or training help everyone to cope in a better way with the changes?

Measuring performance

List the key ways you measure how well you do. Are you satisfied with the results? If you are trying to improve some areas of your work, how could development and training help?

User consultation

What do the people who use the service think about it? Have they raised issues that need thinking about, and would development or training help to do that? The organisation may have formally consulted people through meetings, a survey or satisfaction checks. Even if not, there may be information from comments people make, and analysis of any complaints.

Setting the agenda

Use all this information to set the agenda for the next stage. The information you have collected may suggest some areas of training need, but all will need further investigation.

Looking at information that you already have

Worksheet 1

How well does the organisation work?

Strengths	
Responsive	Always available to members
Strong community support.	Long standing staff team
Highly skilled management committee	

Weaknesses	Learning needed?
Office systems don't work very well	Yes
Don't have access to all langs we need	Won't help
People don't like staff meeting	Yes, but need support as well
Spend too much time fundraising	Not sure how it would help
Not very good with computers	Yes

What are your specific objectives for this year?

	Objectives	Learning needed?
Objective 1	Increase the number of young people using the project by 50%	Yes
Objective 2	Open 7 days per week	No
Objective 3	Widen membership of the management committee and improve the way it works	Yes
Objective 4	Start advice sessions for asylum seekers	Yes

What will change next year?

		Learning needed?
Change 1	A new member of staff joining in January	Yes - plan induction
Change 2	New evening sessions for young people	Yes - learn skill sharing
Change 3	New computer system	Yes - training and practical support

Who do you measure how well you do?

Measure	Results	Improvement needed?	Learning needed?
Sessions a month	64	No	No
Target groups reached	Poor reach to Muslim girls	Yes	Yes
Open on time	86%	Yes	Support group

How do users or members view the organisation?

Response	Learning needed?
Reception area unfriendly	Setting up action team
Phones never answered	Yes

Investigation

Talking to people

This stage aims to integrate everyone’s views into the process, and investigate the issues raised. You may wish to talk to

- paid workers
- key volunteers
- members of the management committee.

You could interview people individually or hold one or more group sessions. If you are going to work on this process together, asking people to complete the checklists on their own first enables everyone to contribute. Talking to people individually provides some confidentiality, and gives everyone the chance to contribute in detail.

This stage aims to

- collect everyone’s personal training or development needs
- get an overview of the organisation’s needs
- facilitate ownership by everyone of the results.

Worksheet 2

The skills checklist

Use the information you collected in Stage 1 to produce your own checklist. Ask about issues that are important to the organisation at the moment. Remove any that are not relevant.

Try to make the skills as specific as possible.

Give all the people you are talking to their own individual checklist. You may need to prepare a different checklist for staff, volunteers and members of the management committee.

The completed checklists can be used to generate the agenda for a group discussion.

Skills checklist – what needs improving?

Name	
Role	

Skill area	Myself	The organisation	Learning needed?
Fundraising	N/A	Weak	Specialist help rather than new skills
Forward planning	OK	Poor	Put new system together, use skills on M/C
Using the computer	OK	OK	Want to go on course as soon as possible
Using the computer network	No idea	OK	No need
Interviewing	Good	Poor	Skill sharing & support from colleagues
Working with young people	Never done this	Adequate	We need briefing from someone quickly & access to info networks
Law & procedure for asylum seekers	Know little	Poor	No
Bookkeeping	Good	Good	No
Publicity & promotion	OK	Poor	Workshop later this year?

Worksheet 3

Personal interview

If the organisation has a formal review, or appraisal system, or it holds regular supervision sessions, then this information will already have been collected.

This may not be the case. There are considerable benefits from some form of regular or annual review programme. Perhaps setting one up might be something that comes out of this review of learning and development needs.

For this worksheet, you will need to decide

- who does this interview
- whether or not the individual information is confidential.

Both of these depend on the way you work with the group, the way they work together, and the roles people have. In some organisations, people might just fill the sheet in themselves, and talk over the results together.

Some key questions for this type of interview are

- How well do you think you do your job?
- Is your personal performance constrained by lack of skills?
- Are you well informed at work?
- Did you receive any training last year? If so, how useful was it? How did you apply your learning?
- How do you see your career developing; what do you want to be doing in three years?
- What kinds of training do you think you need to do your job better, or for your own personal development?
- How do you learn? What kind of training suits you best?

In some organisations this may be a formal interview, in others an informal discussion. It is important to match the style to suit the ability, preference and culture of the organisation.

If the organisation is small, doing straightforward work and not facing major changes, then it's OK to skip the next two worksheets.

Personal review

Name		
Role		
Key question	Learning needed?	
<i>How well do you think you do your job?</i>		
<i>Is your personal performance constrained by lack of skills?</i>		
<i>Are you well informed at work?</i>		
<i>Did you receive any training last year? If so, how useful was it? How did you apply your learning?</i>		
<i>How do you see your career developing; what do you want to be doing in three years?</i>		
<i>What kinds of training do you think you need to do your job better, or for your own personal development?</i>		
<i>How do you learn? What kind of training suits you best?</i>		



Worksheet 4

Other indicators

There is a whole variety of other things that may provide clues to skill gaps or indicate learning or development needs.

Some of these include

- minutes and the management of meetings
- quality of reports, data, policy documents etc
- having systems or policies for planning and review, development, quality, equalities, complaints etc
- achievement of equalities objectives
- appearance of buildings and working spaces
- the organisation of work
- organisational culture, attitude of staff, timekeeping etc
- the approach to clients; how the phones are answered
- use of disciplinary or grievance procedures
- levels of short-term sickness
- the way computers are used
- publicity materials.

People working within organisations often take all this for granted, so an outside view can really help. However, as an outsider – a development worker supporting the organisation – you will need to handle things with tact and sensitivity.

Other indicators

Indicator	Review	Learning needed?
Minutes	Poorly prepared, doesn't help decision making	Some work on improving meetings
Reports & policy documents	Some gaps - others good	No
Systems	Admin good, no complaints procedure	
Equalities	Policy good, some gaps in practice	Issue for a team workshop?
Buildings and working spaces	Reception poor, doesn't feel welcoming	Customer care?
The organisation of work	Late opening problem	Team workshop?
Organisational culture	Appropriate	
Use of disciplinary or grievance procedures	M/C members unclear about role, poor documentation, problem last year	Some training linked to joint session with M/C on supervision

Worksheet 5

Job analysis

In larger organisations, or when skill issues are of serious concern, think about analysing roles in detail. If one particular work area is complex, important, problematical, or changing radically, then focus the analysis on that.

Each person should be asked to

- identify the main areas of their work
- indicate how important each area is
- perhaps say the proportion of time they spend doing it
- evaluate how well they do it
- suggest learning or development that might help
- suggest other organisational changes that might sort out a problem.

In analysing work make sure that the topics that cross over work areas, for example, ICT or getting on with colleagues, are included if you want them to be.

Use worksheet 5 – or design a more relevant one – and ask people to complete it before the discussion. Or you can complete it with them.

Try to take a detached view of each role, and bring the organisation’s objectives into consideration. Does the analysis reflect the organisation’s priorities? Is it focused on the needs of users or members?

Don’t forget to include members of the management committee or other volunteers, if appropriate.

Worksheet 5

Job analysis

Specific activities	Importance to the job	How well done	Learning needed?	Other actions to improve
<i>Providing practical, legal and financial advice to existing credit unions</i>	<i>25% of time</i>	<i>Good on practical & legal. Poor on financial.</i>	<i>Short term training in bookkeeping & accounts. Thinking about NVQ.</i>	<i>Support with the design of simpler accounting systems</i>
<i>Supporting new groups wishing to set up credit unions</i>	<i>35% of time. Critical - funding linked to targets</i>	<i>Already behind on plan</i>	<i>Can't see how it would help. Just need more time and less pressure.</i>	<i>More money for publicity</i>
<i>Fundraising for credit unions and this post</i>	<i>10% but vital for success of 2</i>	<i>Not a problem</i>	<i>None</i>	<i>Need more information on funding sources and their availability</i>
<i>Preparing reports and maintaining internal admin systems</i>	<i>15% of time</i>	<i>Takes up too much time. Reports are always a problem</i>	<i>ICT skills Work planning</i>	<i>New database Better time recording</i>

Identifying skill gaps

Worksheet 6

Identifying skill gaps

By this time you should be clear about

- the organisation’s needs for skills, both now and as things change
- people’s perceptions of their own skill or development needs
- people’s career or self-development aspirations
- the resources available to the organisation
- what will happen if nothing is done
- the availability and acceptability of training methods.

Try to put all this information together in a way that makes sense.

Identify some key issues or areas which are a priority for action. Look for the skill gaps. Where could things be done better?

For each issue or area, summarise the data including

- a description of the issue or area of work
- who is involved in doing the work
- how well it is done
- evidence to justify your conclusion

- learning or development suggestions
- other forms of action.

Identifying skill gaps

Work area or issue	Who is involved?	How well?	Evidence	Possible learning	Other action
<i>Advice sessions</i>	<i>Advice workers</i>	<i>Good basic knowledge, poor recent changes to legislation & practice</i>	<i>Interviews Resource manual Info systems Reputation</i>	<i>“Top-up” course Annual conference</i>	<i>Increased budget for information More time for networking</i>
<i>Use of computers</i>	<i>All staff</i>	<i>Mixed keyboard skills. Poor use of database</i>	<i>Reports Observation Interviews</i>	<i>Touch-typing for 3 database-admin staff</i>	<i>Introduce standard report layouts. Get advice on new data system for the whole organisation</i>
<i>Forward planning</i>	<i>Director and finance worker</i>	<i>Hardly at all</i>	<i>No business plan No clear planning cycle</i>	<i>Short courses on business and service planning</i>	<i>Introduce plan and review process this year, involve both staff and management committee</i>

Worksheet 6

Planning skill development

Worksheet 7

The learning and development plan

Prepare a learning and development plan by building directly on the conclusions of the analysis you have just completed. This is the organisation's plan.

The plan needs to be specific enough that everyone involved knows what's going to happen, but flexible enough to respond to changing events. Someone should be responsible for the learning and development plan. Their role will be to monitor its implementation, chase individuals, and ensure that learning opportunities are maximised. They would also be responsible for reviewing the plan, and reporting its implementation to the management committee.

The plan should itemise all the proposed learning and include

- objectives
- people
- resources needed and arrangements for cover
- arrangements to support implementation
- how the impact of the learning will be monitored.

Think about the resources that are available. You may have to prioritise. How will you balance the business needs of the organisation against the individuals' needs, and the budget available? How can this be done equitably?

Don't just think about formal training courses. You can include all sorts of ways that people develop skill, such as

- skill sharing from colleagues
- mentoring
- on the job learning
- networking
- self-directed learning.

This worksheet can be used flexibly. You might use one or two to summarise the plan for the whole organisation, or prepare detailed worksheets for each work area or key issue (as in the example).

The learning and development plan

Issue or work area		Use of computers				
Learning/training	Objective	Resources	Key dates	Who?	Support to implement	Success measured?
Internal mentoring programme	Everyone confident in new systems - all operating to the same standard	Time	Start in 2 weeks Sessions start June 1	Everyone	Confidence building session	Everyone using the new system
4 day course - advanced use of database	Able to design database to produce performance data for lunch contract with social services	£350 plus temp for 4 half days	During July	Admin worker	Review sessions with staff member responsible for contract	Database implemented by November
2 x half day courses on data inputting	Everyone able to input data into new programme	Training provided by admin worker	Within 2 weeks of system start	Everyone	Support sessions with each person in the week following training	Everyone using the new system. No inputting mistakes.



Worksheet 8

Individual development plan

These are personal self-development plans. Prepare them at the same time as the organisation plan, but negotiate them with each person individually. People may want to prepare these themselves, but they must be approved by the organisation.

Do them for each person who has been involved, which may include

- paid workers
- key volunteers
- members of the management committee.

They are based on each person's individual aspirations and needs, but also the organisation's need for skills to meet its objectives and deliver its services.

Plans should balance both sets of needs. The organisation is committing resources; individuals are committing time and energy.

Individual development plan

Name				
The aim or objective	The area of work	Skill or development needs	Learning or training opportunities	Time scale
<i>To take on marketing responsibilities</i>	<i>1. Customer care 2. Promotion 3. Marketing strategy</i>	<i>Theory & practice Marketing for voluntary orgs</i>	<i>Attend 2 day training course Budget to buy books and materials Mentoring from M/C members</i>	<i>Review in 6 months</i>
<i>Increase efficiency & confidence with computers</i>	<i>4. Typing 5. Database 6. Network</i>	<i>Setting up database Using network</i>	<i>Use typing tutor 15 mins per day. Six days in work programme to do database</i>	<i>This year Within 6 weeks</i>
<i>Obtain professional qualifications</i>	<i>Housing Management</i>	<i>Entry qualifications for evening degree course</i>	<i>Support with NVQs at work. Leave early Tuesdays</i>	<i>Within 2 years</i>

Worksheet 9

Implementation, monitoring and evaluation

Planning may take time, but often the hard part is making things happen: the implementation. Monitoring and evaluation helps you to make sure that the learning and development that you need takes place, and to check that it works. It's important that people put their learning into practice as soon as possible – and share it with their colleagues.

- Have a practical and realistic plan, agreed by each person as well as the organisation. Make sure it includes timescales, and balances individual needs with organisational priorities.
- Think about the practical arrangement. If possible, provide cover or reallocate workloads if people are away from their job.
- Be clear about the purpose and objective of all learning and development.
- Think about (and agree) the way learning will be implemented beforehand. How will learning be shared so that everyone can benefit?
- Have a simple reporting system to make sure that events happened as planned, and that each is evaluated.

- Monitor and evaluate the whole programme. Is all this learning and development making a real difference to the way things happen? Can you measure improvements in performance?

Unlike the other worksheets, worksheet 9 is designed to be used as people undertake learning – and again, afterwards.

Individuals can complete this on their own, but it will be more effective discussed both

before and after the learning, perhaps with colleagues, a mentor, a support group, or as part of regular supervision.

After the learning, review its effectiveness. Were the objectives achieved? How has it made a difference? How could it have been improved? Keep the results so that they can inform next year's review and development process, update business plans and inform other organisational processes or monitoring.

Implementation and review

Name			
Learning or development	Objectives	Implementing learning	Evaluation
<i>2 day introduction to database course</i>	<i>Set up and design new monitoring system</i>	<i>Hard to find the time to sort our system out</i>	<i>Good training - but content not specific to our situation, insufficient time, needs back-up</i>
<i>Women managers' mentoring programme</i>	<i>Increase skills & confidence in management role</i>	<i>Made some significant changes to the way I work</i>	<i>Excellent - really useful to share practical experience</i>

Learning and development resources and contacts

BTEG

BTEG (Black Training and Enterprise Group) is a national organisation providing a voice to government for black and minority ethnic service providers. It is a networking organisation that supports over 600 third sector organisations.

www.bteg.co.uk

Capacitybuilders

Capacitybuilders is a non-departmental public body, established in 2006 to take over managing the ChangeUp programme. It aims to fund improved support for frontline organisations across England, so its funding is specifically for support providers.

The new National Support Services (NSS) programme will give support providers resources and evidence, and share good practice to improve the service they offer frontline organisations.

www.capacitybuilders.org.uk

www.improvingsupport.org.uk

CIPD

The CIPD (Chartered Institute of Personnel and Development) is the United Kingdom's professional body for those involved in the management and development of people.

www.cipd.co.uk

Directory of Social Change

The Directory of Social Change (DSC) is a national information and training charity. It runs courses and publishes books on fundraising, management, organisational and personal development, communication, finance and law.

www.dsc.org.uk

Federation for Community Development Learning

The Federation (or FCDL or “Fed”) supports a network of individuals, organisations and groups interested in community development learning and training. It runs training courses and conferences, produces training materials and resources, and produces bulletins and information sheets to help share good training practice.

The Federation played a central role in developing the National Occupational Standards for Community Development Work.

www.fcdl.org.uk

Funding and Costing Workforce and Governance Development

A 35-page booklet written to help organisations plan, budget, cost and fundraise for workforce and governance development. Commissioned by the UK Workforce Hub and the Governance Hub in 2007.

At time of writing, it is available free from www.ukworkforcehub.org.uk. Printed copies are available from NCVO at www.ncvo-vol.org Cost £5.

Capacitybuilders is bringing together all the resources created by the National Hubs and funded through ChangeUp in an online archive. Available by the end of 2008 at www.improvingsupport.org.uk

Investors in People

Investors in People is the national quality standard which sets out a level of good practice for the training and development of people in order to improve organisational performance and competitiveness. Investors in People is used across a wide range of UK industries and sectors.

www.investorsinpeople.co.uk

For specific information about Investors in People and the third sector, see “How to become an Investor in People: A guide for the Voluntary Sector” published by NCVO at www.ncvo-vol.org.uk. Cost £5.

LearningNet

If your organisation is a member of NAVCA (National Association for Voluntary and Community Action), then you can sign up to LearningNet. This is an email network for people involved in learning and training in local infrastructure organisations. To find out more, email admin.learningnet@navca.org.uk or visit www.navca.org.uk/services/networking/networks/learningnet/

LSC

The LSC (Learning and Skills Council) is a non-departmental public body that took over the roles of the Further Education Funding Council and Training and Enterprise Councils in 2001. It is responsible for planning and funding education and training for adults in England who are not at university.

The LSC is one of the major funders of third sector training and learning activities, usually via local partnerships and consortiums. It has a head office and nine regional offices. You can find regional contacts on its website at www.lsc.gov.uk

National Occupational Standards

National Occupational Standards (NOS) describe the skills, knowledge and understanding needed to undertake a particular task or job to a nationally recognised level of competence.

Sector Skills Councils and standards-setting bodies work with employers and partners to develop the occupational standards for the industries, sectors and occupations they

cover. At the time of writing there are about 25 Sector Skills Councils, and over 20 standards-setting bodies. About 12 Sector Skills Councils have the third sector within their remit, and some of the NOS they produce may be relevant. For example, the Skills for Health Sector Skills Council produces NOS on drugs and alcohol. You can search a NOS directory at www.ukstandards.org.uk

Until 2008, the UK Workforce Hub was the standards-setting body for the third sector. It produced NOS on fundraising, management of volunteers, and trustees and management committees. A new strategic body specifically for the third sector and similar to a Sector Skills Council is being negotiated at time of writing.

www.ukworkforcehub.org.uk or www.improvingsupport.org.uk

NAVCA

NAVCA (National Association for Voluntary and Community Action) is the national voice of local third sector infrastructure. Its members work with thousands of local third sector groups and organisations that



provide community services, regenerate neighbourhoods, promote volunteering and tackle discrimination in partnership with local public bodies.

It promotes the local third sector nationally, by providing members with information, advice, networking and learning opportunities, support and development services. It also draws on members' experiences to influence government and contribute to national policy. www.navca.org.uk

NCVO

NCVO (National Council for Voluntary Organisations) is the largest umbrella organisation for the third sector in England. It runs a wide and high-profile range of relevant services, including research, publications, conferences, events and training. www.ncvo-vol.org.uk

NIACE

NIACE (National Institute of Adult Continuing Education) is the largest organisation working to promote the interests of adult learners across all sectors. It runs Adult Learners'

Week and other campaigns. NIACE also has regional development workers, networks, publications and an information service. www.niace.org.uk

PQASSO

PQASSO is a practical quality assurance system for small organisations – or for projects within larger organisations. It includes a self-assessment work pack to help organisations to set priorities and improve performance. PQASSO was designed specifically for third sector organisations by CES (Charities Evaluation Services), and is the best known quality system in the sector. www.pqasso.org.uk

VCS Learning Links

VCS Learning Links is a website specifically about learning and training in the voluntary and community sector (VCS). It includes a directory of infrastructure organisations and networks that support learning and training, plus a resources section with case studies, weblinks and relevant resources. www.niace.org.uk/projects/vcslearninglinks/

SKILD

Don't forget, if you give hands-on support to local third sector groups, then SKILD is a learning project specifically for you. We do loads of things including

- training courses
- workshops and networking events
- other learning activities, such as action learning sets
- exercises and tools you can use with groups
- the SKILD framework – a new website about the skills and knowledge you need to do the job well.

See more at www.skild.org.uk

About us

SKILD

SKILD is a learning project for people who give hands-on support to local frontline third sector groups across England.

Work might be offering general development support to groups, or specialist help such as funding advice or training.

There's a wide range of people out there doing all sorts of things with local third sector groups. They are typically called development workers, but they might also be called anything from a small groups advisor or funding advice worker to a training officer or legal consultant.

The overall aim of SKILD is to equip people with the skills and knowledge they need to give accessible, relevant and high quality support to local third sector groups.

SKILD is a project of NAVCA and is for people working in any kind of infrastructure organisation: from CVS and Rural Community Councils through to black and minority ethnic development organisations, community forums and local development trusts.

www.skild.org.uk
skild@skild.org.uk
0114 278 6636

NAVCA

NAVCA (National Association for Voluntary and Community Action) is the national voice of local third sector infrastructure. Our members work with 164,000 local third sector groups and organisations that provide community services, regenerate neighbourhoods, promote volunteering and tackle discrimination in partnership with local public bodies.

Our purpose is to promote the local third sector nationally. We do this by providing our members with information, advice, networking and learning opportunities, support and development services. In turn, we draw on our members' experience to influence government and contribute to national policy. We also work closely with other national bodies to ensure a collaborative approach to policy development.

www.navca.org.uk
navca@navca.org.uk
0114 278 6636



Based on “A Practical Guide to Planning Training and Development Strategies” originally written and published by Greater London Enterprise and Gowland Taylor Associates (now Mutual Advantage).

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governance hub



performance hub



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