# CLS Managers Guidance around application of the Co-op Study Leave Policy.

*Updated December 2019*

**Introduction and Background**

The development and progression of our colleagues is paramount to the success of Legal Services and continued growth of our team. The Co-op Study support policy states that funding will be considered if it’s aligned with a colleague’s Personal Development Plan (which will always link to business expectations – link below), is relevant to their role, success can reasonably be expected and there is sufficient budget available.

Unlike other areas of the business, the qualifications studied by many of our colleagues may carry a significant number of examinations and are studied over a longer period. In light of this, CLS needs to balance its desire to support colleagues with effectively managing the business. This document has been prepared as a guide in applying the criteria of the Co-op Study Policy in the specific circumstances of a Legal Services business and to ensure consistency in this application across the different teams and departments in CLS.

**In Line with PDP, and Business Requirements**

The personal development of a newcomer to the business, or someone in a more junior role (such as Assistant, rather than Fee-Earner) will primarily consist of experience they gain in role and increased exposure to new and more complex matters. This can be further complemented by using our Learning Management system.

A direct benefit is more likely to be gained from funding an external qualification for a Fee-Earner, or other established or experienced colleague. This is because an increase in the complexity, quality and efficiency of their work can reasonably be expected as a result of this and the qualification is more likely to be directly in line with their PDP.

Managers should therefore review the applicants PDP when considering their request for funding for qualifications, courses or paid study leave.

As all PDPs link to business requirement, managers should also consider the direct benefit to the applicant’s role and to the business. This will include a review of the content to be studied. For example, it is recognised in Probate Operations that the content of a STEP course is almost entirely directly relevant to the job role of a Fee-Earner, whereas the same cannot be said of Ilex. In this department, funding is considered for the STEP qualification in preference to a more general qualification like Ilex, in which case paid study leave can be considered instead.

**Funding**

It is unlikely that funding for qualifications will be made available to everyone. A colleague and their manager will both have input into the colleague’s agreed PDP, and will have ensured the PDP links to business requirements. A colleague who has development areas in their role would be guided to focus on them first in priority to any external development. In addition, the policy states that success in the qualification can reasonably be expected.

It is therefore suggested that managers consider the colleague’s performance in role against their PDP, when funding is requested. They should also weigh up the likelihood of success, and evidence to suggest anything to the contrary (for example, the failure to pass any internal technical tests undertaken by the colleague).

**Study Leave**

The policy allows discretion for managers to offer paid study leave of up to two days per exam. Given the number of colleagues undertaking study for different qualifications across four sites in CLS, it is important that paid study leave is considered for all qualifying colleagues across the board consistently

Qualifying colleagues are those undertaking a recognised professional qualification or course relevant to a Legal Services business, or to their job role within CLS, whether or not the qualification itself is funded by CLS. This could potentially include (but is not limited to, and where a manager is in any doubt, this should be raised to their HoP for a decision):

* STEP
* Ilex, LPC, GDL,
* ACA, ACCA, CIMA
* CIPD

\* Note that non-business relevant courses will not be eligible for paid study leave

**Paid study leave will be limited to a maximum of five days per year, to include the examination(s). If more time off is required, for example, in cases where there are a high number of exams, managers should consider holiday or unpaid leave in addition to the five days paid leave, or agreeing flexible working to allow attendance at scheduled exams. Applications for study leave should be considered in accordance with the following guidelines:**

* Five days per year for STEP will cover two Certificates (i.e. two workshops and a half-day exam for each Certificate). If a colleague does one Certificate per year, they should get 2 ½ days each year, to cover their workshops and a half-day exam;
* Managers should consider the length and type of an exam before agreeing paid study leave, particularly where another option might be more appropriate. For example, if an examination is assessing skill rather than knowledge and therefore needs no prior study, it would not be appropriate to grant study leave, although time off for the exam itself could be granted. If a colleague is out of the business briefly for a 20-min exam, it might be more appropriate for them to make up the time rather than be awarded paid study leave;
* If a colleague is assessed purely through coursework rather than written exams, managers should consider offering up to a maximum of five days per year towards this work, depending on the type of coursework;
* If there is more than one colleague in the department undertaking the same exam(s) on the same day(s), any paid study leave should be offered on different days to ensure we maintain customer service.
* Colleagues can request flexitime for a course of study and this should be considered as part of the Co-op’s application process for flexible working hours. However, managers should explore with the colleague the alternatives to the course on offer, to ensure minimal business impact. For example, if two institutions offer the same course; one being distance learning and the other requiring attendance every Friday, managers and colleagues should discuss the relative impacts on the colleague’s learning and business needs before reaching a decision.

NOTE: this guide should be read in conjunction with the policy, which sets the guidelines for repayment of fees if a colleague leaves the business after receiving funding, and the processes for applying for funding or paid leave

**Links to Policy and Application Forms:**

* Study policy:

<http://theintranet.lb.live.co-op.local/Content/ContentPage.aspx?id=63059&epslanguage=en-GB>

* Application for time off to study:

<http://theintranet.lb.live.co-op.local/PageFiles/183534/Application%20for%20Time%20Off%20to%20Train%20or%20Study%20-%20February%202017%20FINAL.pdf>

* Application for financial support for study:

<http://theintranet.lb.live.co-op.local/PageFiles/183534/Updated%202019/Financial%20Support%20for%20Study%20Application%20Form%20-%20July%202019%20FINAL.pdf>

* Personal Development Plan template:

[http://theintranet.lb.live.co-op.local/PageFiles/96274/Colleague%20%e2%80%93%20adding%20goals%20and%20comments%20online.pdf](http://theintranet.lb.live.co-op.local/PageFiles/96274/Colleague%20%E2%80%93%20adding%20goals%20and%20comments%20online.pdf)