



Learning and Development Policy

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INTRODUCTION

BCX require all employees to conduct their duties and functions with integrity, objectivity and honesty in accordance with the highest ethical standards.

BCX is committed to job related learning and development of its employees and view skills development interventions and educational assistance as a means of ensuring the continuous improvement of employees, thus ensuring the sustainable performance of the company into the future. Learning and development in this policy refers to both skills development interventions and educational assistance for tertiary qualifications.

In fulfilment of this Policy, BCX is committed to the enhancement of job skills, creation of opportunities for knowledge transfer, and the maximisation of job performance in a competitive environment.

BCX is committed to stimulating growth and development of employees and becoming a Learning Organisation while aligning the policy with the minimum requirements of the BBBEE Codes of Good Practice and other relevant legislation.

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1. DEFINITIONS, ABBREVIATIONS AND ACRONYMS

Abbreviation	Definition
ETQA	Education and Training Quality Assurance
EXCO	Executive Committee
MICT SETA	Media, Information and Communications Technology SETA (MICT)
SETA	Sector Education and Training Authority
NQF	National Qualifications Framework
SAQA	South African Qualifications Authority
SLA	Service Level Agreement

2. LEGISLATIVE FRAMEWORK

2.1 Associated/Related/Required Process, Standards and Other Policies

- Recruitment
- Induction
- Performance Management
- Employee Relations
- Recognition and Reward
- Transformation
- Payroll
- Employment Equity

2.2 Related Legislation and Standards

- Basic Conditions of Employment Act (No. 75 of 1997)
- BBBEE Codes of Good Practice
- Black Economic Empowerment Act (No 53 2003)
- Employment Equity Act (No. 55 of 1998)
- Labour Relations Act (No. 66 Of 1995)
- Skills Development Act (No.97 of 1998)
- Skills Development Levies Act (No. 9 of 1999)
- South African Qualifications Authority Act (No.58 of 1995)

3. ROLES AND RESPONSIBILITIES OF KEY STAKEHOLDERS

The following roles and responsibilities are applicable to BCX internal and external stakeholders:

3.1 Group EXCO

- Identify strategic training needs in support of the BCX's strategy and Balanced Scorecard.
- Equip Line Managers with the skills and knowledge to manage, develop, and empower employees.
- Communicate the group training priorities to Group Human Resources, all senior Line Managers and Line Managers.
- Create a culture that encourages mentorship and coaching.
- Approve and commit to a budget for strategic and national skills development interventions and educational assistance and ensure that it is spent according to plan and in alignment with strategic objectives.
- Approve training in line with the delegation of authority matrix.

3.2 Executive Sponsor

Inspire the Executive Team to demonstrate behaviour and actions that support and promote a learning organisation to sustain performance excellence.

- Play a leading role in providing input to, and the approving of, the BCX Workplace Skills Plan and Annual Training Report.
- Ensure that training and development policies and practices in BCX are aligned with the BBBEE Codes of Good Practice and relevant legislation.
- Formulate a strategy for training and development within BCX and put in place a structure and process to support this strategy.

3.3 Line Management

- Recognise and act on the Learning and Development needs of employees, particularly those from designated groups, in meeting the requirements of the BBBEE Codes of Good Practice.
- Demonstrate commitment to the Learning and Development of all BCX employees by implementing and evaluating Learning and Development initiatives as part of the Performance Management Process.
- Agree, approve and support the implementation of Career Development Plans for employees in line with the strategic objectives of the business unit and provide feedback to employees on a regular basis.
- Provide the resources, which include but not limited to; time, mentors, support structures, and opportunities, to ensure that Learning and Development takes place.
- Align the division objectives and programmes with the division's employment equity plans.
- Ensure that all relevant training documents are signed by the employee on approval of training.
- Ensure that all relevant cost recovery documentation is completed in the case of unsuccessful completion of a training intervention or resignation.
- Ensure that all new employees attend the BCX Induction within the first two months of joining the organisation.
- Approve training in line with the delegation of authority matrix.

3.4 Employee

The term “employee” refers to all Categories of employees in positions within BCX.

- Accept joint responsibility for his/her own development in seeking opportunities to grow and improve his/her own performance.
- Commit to ensuring attendance of the BCX Induction program within the first two months of joining the organisation
- Commit to ensuring successful participation in training opportunities to improve his/her own performance.
- Understand his/her own role in supporting the divisions or team’s strategic and operational objectives.
- Complete Learning and Development interventions successfully.
- Apply newly gained knowledge to his/her job to continuously improve performance and transfer knowledge to other employees.
- Ensure that necessary preparatory work is discussed with his/her Line Manager (e.g. discussion of study leave and resource planning).

3.5 Learning and Development

Establish Human Resources related policies and procedures and provide support to both Line Managers and employees on training matters.

- Implement a Corporate Learning and Development Strategy in line with the BBBEE Codes of Good Practice.
- Consolidate and submit reports received from the Human Resource Business Partners, to the BCX EXCO, MICT SETA, and the Department of Labour.
- Plan and implement National Skills Development Programmes in line with the requirements of the BBBEE Codes of Good Practice and the needs of BCX stakeholders.
- Facilitate timeous compilation and submission of the BCX Workplace Skills Plan and Annual Training Report to the MICT SETA.

Approve and manage the approved preferential procurement list by reviewing the Preferred Training Providers on the list regularly and monitoring their SLA’s; supporting suitably qualified BBBEE Training Providers, as well as ensuring that training providers are SETA Registered and Accredited.

- Participate in the skills development activities of the Skills Development and Employment Equity Committee.
- Approve training ensuring alignment to core skills and the organizational transformational goals
- Ensure that Induction for new employees is conducted monthly

3.6 Regional Human Resources Representative

- Coordinate information for the region and submit it to Learning and Development.
- Assist the regions in the planning of Learning and Development interventions.
- Implement and monitor the implementation of the division’s training plan
- Evaluate training, and report on training and development interventions to Learning and Development.

3.7 MICT Seta

- BCX is registered with the Media, Information and Communication Technology (MICT SETA). The MICT SETA is responsible for:
- Developing a Sector Skills Plan within the framework of the National Skills Development Strategy.
- Implementing the Sector Skills Plan.
- Promoting skills development in the sector through Internships and other skills programmes.
- Registering Internship and Learnership Agreements, and
- Collecting skills development levies and disbursing grants in the sector.

3.8 Training Providers

- BCX utilises training providers to satisfy identified training needs. Training providers must provide training and development programmes in accordance with the requirements of the SAQA Act, Skills Development Act, BCX Learning and Development Policy and governed by the appropriate SLA.
Training providers must be evaluated, selected, and appointed by the Learning and Development department.

4. GENERAL LEARNING AND DEVELOPMENT STANDARDS

The following guidelines must be adhered to:

4.1 General Standards to Line Managers

- All Line Managers and supervisory employees must develop practices that enhance learning and development of employees as well as work towards achieving the requirements of the relevant legislation.
- Strategic learning and development initiatives identified by BCX EXCO must serve as a starting point for divisions to plan their employee's individual learning and development interventions.
- Learning and Development interventions must be in line with BCX and the division's strategic operational objectives and must be in support of the employee's job profile.
- All learning and development interventions must be monitored and reported monthly via the relevant Human Resources Business Partners.
- All learning and development interventions in South Africa will be monitored and reported on annually to the MICT SETA.
- All employees are entitled to improvement initiatives, although not all development opportunities will necessarily have a monetary value, e.g. on-the-job training may be supported by coaching and mentoring as development opportunities.
- All study leave applications must be based on the principles discussed in Corporate Regulations, Terms and Conditions of Employment
- Training programmes will be monitored by Learning and Development to ensure alignment with the relevant policies and legislation.

4.2 Standards with regards to Project Consultants

- Learning and Development for Project Consultant's must only address up-skilling, and the provision of skills that were not planned for.
- The Continued Service Agreement period for Project Consultants may not exceed the termination date as specified in the Contract of Employment.

4.3 Standards with regards to transformation

- BCX will strive to give preference to suitably qualified BEE training providers.
- BCX will eliminate barriers of unfair discrimination in the allocation of training opportunities.
- Training programmes must be aligned with the employment equity objectives of BCX.

4.4 Budgetary standards

- The Learning and Development budget is managed centrally within the Learning and Development department however all training interventions must still be approved as per the relevant DOA in conjunction with Learning and Development.
- Skills development interventions and educational assistance opportunities should be linked to the strategy of the organisation as well as to the skills gaps identified in the respective BU.
- All skills development interventions should be well planned and reflect on the training plan (WSP) for the respective BU.

5. SKILLS DEVELOPMENT INTERVENTIONS AND EDUCATIONAL ASSISTANCE

The following strategic skills development interventions apply in BCX:

- National Training and Development initiatives such as Internship Programmes must support Business and Transformation objectives as well as meet the requirements of the BBBEE Codes of Good Practice.
- The Management and Leadership Development must be utilised as a means of fast tracking talented individuals in the company.
- Employees who participate in other National Training and Development Programmes must receive guidance from Mentors and Coaches.

5.1 Guidelines for Education Assistance

The following guidelines are specific to educational assistance in BCX.

- Educational assistance refers to NQF aligned diplomas and degrees conferred by a recognised and accredited Institution of Higher Learning.
- BCX will only provide educational assistance as part of this policy if the diploma or degree is:
 - Relevant to the strategic objectives of a division.
 - Relevant to the inherent job requirements of the individual.
 - Leading to a career path development opportunity for an employee and has been identified as part of the career development plan for such an individual.
- BCX will only sponsor educational assistance for the minimum required time to complete such a qualification on a part time basis as set out in the relevant institution's curriculum.

- Educational assistance is bound to the continued service agreement as stipulated in section 4.3.7 of this Policy.
- Educational assistance for post graduate studies such as Master's Degrees and MBAs must only be considered when the qualification is part of the inherent job requirement of the employee and has been identified as part of the development plan of the individual.
- BCX will only sponsor fully accredited MBA programmes that are offered by recognised tertiary institutions.

6. REQUESTING, RECOMMENDING, APPROVING AND EVALUATING LEARNING AND DEVELOPMENT

6.1 Eligibility

- An employee, who has been in BCX's employment for a least one (1) year, may request specific training and development opportunities.
- The training request must be discussed during the Performance Management Process.
- If the training request is mutually discussed, agreed, and approved by the Line Manager, it is recorded on the Employee's Individual Development Plan.

6.2 Training Approvals

- Training request form needs to be completed, approved and submitted to Learning and Development for approval at least 2 weeks prior to the commencement of training.
- No training requests will be approved outside of the above stated period.
- No training can be attended without a PO number, BCX will not pay for training undertaken without prior approval or a PO number.

6.3 Examination and Study Leave

- The Line Manager and employee must discuss examination and study leave requirements and approval thereof before the start of the training programme.
- The Line Manager must require the employee to utilise annual leave days for additional study purposes. Refer to the Terms and Conditions Policy (Permanent / Project Consultants) for leave details.
- Examination or study leave are applicable to all training interventions attended during working hours. All examination and study leave must be requested and approved, as per the normal BCX leave process, prior to attending the training intervention.

6.4 Salary

- Permanent Employees will receive their normal salary while attending approved training.
- Project Consultants' will receive their normal rates equal to 8 hours per day.

6.5 Training Expenses

- It is the Line Manager's responsibility to manage training resources.
- The BCX EXCO Member is responsible for determining the degree to which training expenses should be paid by BCX.
- The decision may range from the payment of all expenses associated with training as listed below, to simply granting official time off to attend classes.

- Where expenses occur, over and above the employee's budgeted learning and development amount, the financial implications must be discussed, with the relevant division EXCO Member's prior to approval, between the relevant employee and Line Manager.

The following must be considered, depending on budgeted amounts available:

- To reduce costs the use of local training providers is recommended.
- Travel, accommodation, and per diem must be paid within the limits prescribed by BCX Travel Regulations.
- The payment of tuition fees, books and prescribed materials.

6.6 Costing Model

Direct Costs	Indirect Costs
The actual costs charged by the Training Provider	Additional training-related costs incurred by the Division
Tuition and Fees	Travel and Transportation
Prescribed Materials	Accommodation
Other expenses directly related to the training	Subsistence Allowance and Refreshments

Direct and indirect costs should be clearly reflected on the employee's Individual Development Plan to calculate the total training expenses.

6.7 Continued Service Agreement

- An employee must agree in writing to continue to work for BCX for a specified period as stipulated in Tables 2 and 3 below.
- The Line Manager and the employee must discuss the training costs and the period of continued service and they should be agreed upon prior to the commencement of the training.
- The continued service period has a minimum duration of 6 months and a maximum duration of 24 months.
- The employee shall be bound to repay BCX the full amount or pro-rated amount of the total costs and expenses incurred by the company on his/her behalf in the event of the employee defaulting on any of the following:
 - Resigning from BCX before completing the continued service period
 - Withdrawing from an approved training programme
 - Failing to successfully complete the programme/course/exam

The tables below summarise the binding period to be agreed upon in the Continued Service Agreement (Section D of the Training Request).

The continued service period will start immediately after successful completion of the training intervention and will not exceed 24 months as stipulated below.

Please note in the event of a programme being longer than 12 months, the first year of continued service period will be concurrent to the 2nd year of the training programme.

Successful completion shall mean adhering to the following:

- Attendance of all required training days
- Submission of all required assignments, where applicable
- Completing all required assessments and receiving of notification of results, where applicable
- Obtaining a minimum proficiency rating to be declared successful, where applicable.

The differentiation between Short Course Programmes and Tertiary Education Programmes is as follows:

Short Course and Skills Development Programmes are those programmes that refer to seminars, conferences, training interventions done by registered SAQA and SETA Training Providers, IT certification and other IT related skills programmes, leadership development skills programmes all ranging from an NQF Level 4 – 8 as well as end user training.

Tertiary Education Programmes are those programmes offered at an institute of Higher Education and will relate to NQF Levels 6 to 8 and which ultimately result in a formal qualification i.e. 3-year degree, 4-year diploma, honours degree, master's degree and doctoral degree.

The Continued Serviced Periods for these two categories will therefore be as follows:

SHORT COURSE, SKILLS DEVELOPMENT PROGRAMMES AND TERTIARY EDUCATION PROGRAMMES

Cost of Training	Continued Service Period	Form to Complete
Less than R 10 000-00	Not Applicable	Training Request Form (All sections excluding Section 2)
More than R 10 000,00 up to R 20 000-00, training duration less than 6 months	6 Months	Training Request Form (All Section for amounts over R10 000)
More than R20 000 -00 up to R 50 000, training duration between 6 and 12-month period	12 Months	
R 50 000-00 and more, irrespective of training duration	24 months	Training Request Form (All Section for amounts over R10 000)
*Multiple training interventions in a BCX financial year exceeding R 10 000-00	6 or 24 Months depending on accumulated cost of multiple training interventions	* All amounts must be consolidated by the Line Manager and a new Continued Service Agreement must be completed and will replace all previous agreements in that financial year

6.8 Failing to Complete Training

- It is expected of employees to complete training assignments just as they are expected to complete other work assignments. If the employee fails to complete a training intervention future training support may be denied unless:
 - (i) The employee has completed the training at no cost to BCX; or

(ii) Reimburse BCX for the total amount of funds spent by BCX; or

(iii) A waiver is granted as per the Authority Matrix.

- In addition, if it is determined that the training was not attended or completed due to wilful employee misconduct or negligence, the employee will be subjected to further disciplinary action.
- By signing the Training Request form, the employee accepts all conditions as stipulated in this Policy and acknowledges that they are bound to repay to the company the full amount of the total costs and expenses incurred, plus interest.
- The repayment period shall not exceed 12 months while the employee is still in the employment of BCX.
- In the case of resignation before the completion of the agreed period all outstanding debt will be due on the last working day.

6.9 Waiver of Financial Responsibility

- A waiver is a special arrangement which exempts the employee from reimbursing the company for money outstanding.
- Employees who do not complete their training successfully have the choice of reimbursing BCX for the training expenses or alternatively may request a waiver of financial responsibility. Refer to Authority Matrix.
- A waiver of an employee's financial responsibility for cancelled, incomplete, or unsuccessful completed training will be granted only based on the relevant Line Manager's written recommendation and presentation of good and sufficient reasons and authorised by the relevant AD Member or BCX EXCO Member as per the Authority Matrix.

A waiver may be granted based on the following reasons:

- The employee has completed 80% of the required period of continued service.
- The employee resigned because of own illness or the serious illness of a member of his/her immediate family.
- The employee is unable to make payment because of severe financial hardship.
- The employee is retrenched based on operational requirements.

Once an employee has successfully completed a training intervention and/or a continued service period, the employee's contractual obligations becomes null and void as per Section 1 C and D of the signed Training Request Form.

6.10 Guidance to Cancel / Withdraw from Training

- All course cancellations and withdrawals must be made prior to the start of the course and, whenever possible, prior to the vendor's cancellation/withdrawal deadline – as per the Service Level Agreement - to protect the interests of the employee and BCX.
- The HR Business Partner and Learning and Development department must be informed of all cancellations and withdrawals.
- Any costs incurred in the event of late cancellations or non-attendance will be for the division's account.

6.11 Training Cost Recovery

BCX is committed to training and development of its employees and will therefore invest time and money for applicable skills development initiatives, however the company would also like to see the benefit of return on investment made on skills development of its employees.

It is therefore necessary to recover the total training cost and expenses incurred by BCX from an employee in the following instances:

6.12 Unsuccessful Training / Non- Attendance

Employees will be expected to pay back the full cost of all training expenses incurred, plus interest, where the company has already paid such expenses, if:

- *a training intervention is unsuccessfully completed*
- *due to non-attendance of the training intervention.*
- *resignation during study period or during continued service period.*

Employees will be expected to pay back the cost of all training expenses if they resign before the continued service period has lapsed, based on a pro-rata calculation as stipulated in the tables below.

A request to recover training cost must be completed by the relevant employee and Line Manager and forwarded to Payroll.

All invoices should be made out to BCX and when completing the training request form sections C, D & E should exclude the VAT shown on the invoice.

The following tables outline the cost recovery for short course, skills development programmes and tertiary education programmes.

COST RECOVERIES FOR SHORT COURSE, SKILLS DEVELOPMENT PROGRAMMES AND TERTIARY EDUCATION PROGRAMMES

Cost of Training	Continued Service Period	Cost Recovery	
		1st 50% of continued Service Period	2nd 50% of continued service period
Less than R 10 000-00	Not Applicable	100% of cost in the event of unsuccessful completion or non-attendance	
More than R 10 000,00 up to R 20 000-00, training duration less than 6 months	6 Months	100% of cost in the 1st 3 months of continued service period	Pro-rated amount on total cost during the last 3 months of continued service period
More than R20 000 -00 up to R 50 000-00, training duration between 6 and 12-month period	12 Months	100% of cost in the 1st 6 months of continued service period	Pro-rated amount on total cost during the last 6 months of continued service period

R 50 000-00 and more, irrespective of training duration	24 months	100% of cost in the 1st 18 months of continued service period	Pro-rated amount on total cost during the last 18 months of continued service period
*Multiple training interventions in a Business Connexion Group financial year exceeding R 10 000-00	6 or 24 Months depending on accumulated cost of multiple training interventions	100% of cost in the 1st 50% of continued service period as per the guidelines above	Pro-rated amount on total cost during the last 50% of continued service period as per guidelines above

Please Note: The pro-rata repayment of total cost spent becomes applicable after 50% of the continued service period has been completed.

7. QUALITY ASSURANCE

- BCX recognises that to be effective, training will need to be of high quality and must whenever possible lead to an externally recognised, SAQA registered qualifications or credits towards one.
- Internal trainers will be subjected to the same standards as those of external training providers and meet the same requirements applicable to those providers.
- Where training is conducted externally it shall take place through a public sector or industry recognised training provider, which is accredited by a relevant SETA/ETQA who must be registered by SAQA.

8. POLICY ENFORCEMENT AND VIOLATION

- Failure and or refusal to abide by the rules detailed in this policy shall be deemed as misconduct and BCX may initiate the appropriate investigation and disciplinary action against employees, which may lead to dismissal and or civil action.
- A claim of ignorance as to the existence and or application of this policy shall not be grounds for justification of non-compliance.

9. POLICY REVIEW

- This policy will be reviewed as and when required to comply with changes in applicable legislation or BCX administrative rules, and or to enhance its effectiveness.
- Furthermore, ad-hoc changes and improvements will be made as and when they are identified.

10. REVISION HISTORY

Policy Number	Policy Title	Creation Date	Revision number and date	Author
BCGP-7-60	Learning and Development Policy	2018-08-10	2018-08-10	Elana Jacobus
BCGP-7-60	Training and Development Policy	2016-02-03	2016-02-03	Pieter Kellerman
BCGP-7-60	Training and Development Policy	2016-12-07	2017-01-10	Bhavisha Purshotam

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11. CHANGES SINCE LAST VERSION

Applicable changes to the document since least published version			
Change requested by:	HR COE	Date of Request:	1 July 2017
Summary of changes			
Version Number	Paragraph	Description of change	Effective Date
7.0	All	Alignment to new branding and formatting	14 July 2017
8.0	All	Changes in naming conventions and process	28 August 2018