

**HR Guidance**

**Career Grades Scheme -Guidance for Managers**

Introduction

A Career Grade is an agreement between the employee and the Council. It should be used when the Council agrees to pay some or all of the training costs to enable an employee to acquire a new qualification, skill or competency and progress to the vacancy, within the Career Grade, which needs to be filled.

Career Grade Training Agreements are necessary to ensure that the Council receives some return or value for money for the investment of public monies by encouraging the employee to remain with the Council for at least 3 years so the benefit of the training can be realised. If the employee leaves before the three years is completed they may be required to repay some or all of the costs depending on the circumstances.

Managers must ensure that the Career Grade has been approved in the first place before recruiting to the post and then then ensure that the successful candidate signs the Training Agreement (which should be part of the job offer) before confirming the appointment and agreeing to the Training activity and the commitment of funds. This will apply whether the training is being funded from the Learning and Skills Team or directly by the service area.

The signed Career Grades Training Agreement should be scanned and sent to ldadmin@cumbria.gov.uk

Procedure

Agreement to fund the Learning / Training Activities

1. Where there are recruitment and retention difficulties a manager may consider recruiting to a post on a Career grade (see the Career Grade Scheme). The Manager **MUST** ensure that the relevant training is available to enable the successful candidate to receive the necessary training to be able to undertake the duties of the full role. The manager should discuss this in the first instance with the Workforce Learning and Skills Manager to ascertain if training is available and determine the funding arrangements.
2. If the training is not available then a Career Grade cannot be used.
3. Where the relevant manager and the Workforce Learning and Skills Manager determine that an employee will have their training / qualification course (including Apprenticeships for existing employees) costs paid by the Council (either through the central budget or the Apprenticeship Levy or directly by the Service) they must ensure that the Career Grades Training Agreement is signed by the employee and by the relevant manager / senior manager within their service area.
4. Please note that the Career Grades will relate to specific qualification / training course(s) linked to the Career Grade.

1. The Signed Career Grade Training Agreement should then be returned by the manager to the Learning and Skills Team to ldadmin@cumbria.gov.uk for signature by the appropriate Workforce Learning and Skills Manager, on behalf of the Council.
2. The Learning and Skills Team will send the signed Agreement to the Service Centre via the Service Centre Portal for a copy to be placed on the employee’s personnel file and recorded on iTrent.
3. The Service Centre will complete the relevant field on the employee’s record indicating that they have entered into a Career Grade Agreement.
4. Provided that the employee successfully completes their training from the point of qualification (notification of the final exam results or successful completion of the course) and all other learning and development activities necessary to progress to the full role and completes 3 years’ service with the Council thereafter, the training costs will not be reclaimed.

Arrangements to reclaim costs if the employee leaves before the expiry of the timescale as described in the Career Grades & Training Agreement.

1. As soon as the manager knows that an employee is leaving, the Manager **must notify the Service Centre immediately** by completing the leaver form on the Portal.

1. The Service Centre will notify the Workforce Learning and Skills Manager via ldadmin@cumbria.gov.uk that there is Career Grade Agreement in place and the employee is leaving.
2. The Workforce Learning and Skills Manager will discuss and agree the repayment of the costs with the relevant Manager.
3. The manager should, where possible, meet with the employee to discuss the repayment of costs, the rationale for the calculation of the amount to be reclaimed and inform them that this will be deducted from their salary payments / final salary. If there are insufficient salary payments for the whole amount an invoice for the outstanding amount will be sent to the employee. The Council should recover monies in a fair and equitable manner which does not leave the employee in a situation where they would not be able to meet their financial commitments or suffer undue financial hardship. (See the Overpayment Recovery Procedure). Alternative repayment arrangements may be agreed if appropriate.
4. The Learning and Skills Team will advise the Service Centre of the amount to reclaim, the method of repayment and the cost centre to be reimbursed.
5. The Service Centre will deduct the amount of the training costs to be reclaimed as notified either from the employee’s salary / final salary and / or will raise an invoice for any outstanding monies.
6. The relevant Learning and Development budget or the service budget will seek to be reimbursed by the amount recovered as appropriate.

**Checklist of Action:**

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| **Responsibility** | **Action** |
| Manager  | Identifies if a Career Grade is necessary and checks with the Workforce Learning and Skills Manager to see if appropriate training is available and if it meets the criteria for funding.  |
| Manager  | Obtains approval for release of funds from the relevant budget holder/ Finance Manager if not being funded from the central Workforce Learning and Skills budget.  |
| Manager | Prepares the Career Grade Agreement and asks the employee to sign. |
| Employee | Signs the Career Grade Agreement. |
| Manager  | Signs the Career Grade Agreement and sends it to the Learning and Skills Team at ldadmin@cumbria.gov.uk **in all cases** (whether funded separately or from the central funds). |
| Learning and Skills Team | The Career Grade Agreement is signed by Workforce Learning and Skills Manager. |
| Learning and Skills Team | Sends the Signed Agreement to Service Centre for attachment to employees’ record.  |
| Service Centre | Attaches the signed Career Grade Agreement to the employee record and sets up the status of the ‘Career Grade in progress’.  |
| Manager  | Must inform the Learning and Skills Team at ldadmin@cumbria.gov.uk if there is any change to the expected date of the final exam results or successful completion of the course(s).  |
| Manager | Informs the Service Centre via the Service Centre Portal of:* the completion date of all relevant learning and development, and attaches a copy of Qualification Certificate or confirmation of completion of the course, for attachment to employees’ record
* Specifies when the employee progresses to the next level of the Career Grade or, progression to level B in the current grade.
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|  | Arrangements to reclaim costs if the employee leaves before the expiry of the timescale as described in the Career Grade Agreement  |
| Manager | **Notifies the Service Centre** **immediately** that the employee is leaving via the Service Centre Portal.  |
| Service Centre | Notifies the Learning and Skills Team that the employee is leaving and identifies that there is a Career Grade Agreement in place and costs may need to be recovered. |
| Manager & Learning and Skills Team | Determines the amount of costs to be reclaimed (following discussion between the Manager, the Workforce Learning and Skills Manager and the employee as appropriate). |
| Learning and Skills Team | Notifies the Service Centre of the amount to be reclaimed and the repayment arrangements. |
| Service Centre | Reclaims the costs as instructed by deducting monies from the salary payments including final salary if appropriate. If there is insufficient pay in the final salary to do this, the Service Centre should arrange for an invoice to be issued to the employee for the outstanding balance.  |