TRAINING, LEARNING AND COMPETENCY ASSESSMENT PROCEDURE

PRN-139: Training, Learning and Competency Assessment Procedure
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Trading/Business Name: CAREHOPES
Company Registration Number: 15556946
SIC Code: 88100 – Social Work Activities Without Accommodation for the Elderly and Disabled
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1. Purpose

This procedure sets out the arrangements for identifying, delivering, recording, monitoring, and assessing training, learning, development, and competency requirements.

The organisation is committed to ensuring that employees and volunteers possess the knowledge, skills, behaviours, and confidence required to provide safe, effective, compassionate, and person-centred companionship and wellbeing support services.

This procedure aims to:

- Promote safe practice.
- Support professional development.
- Ensure legal and regulatory compliance.
- Maintain high standards of service delivery.
- Improve service user outcomes.
- Encourage lifelong learning and continuous improvement.

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2. Scope

This procedure applies to:

- Employees
- Volunteers
- Managers

- Directors
- Trustees where appropriate
- Students and placements

It applies to:

- Induction training
- Mandatory training
- Refresher training
- Role-specific training
- Professional development activities
- Competency assessments

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3. Principles

Training and development arrangements will be:

Person-Centred

Supporting high-quality, individualised services.

Proportionate

Relevant to the needs and responsibilities of each role.

Accessible

Designed to meet differing learning needs and preferences.

Continuous

Recognising that learning is an ongoing process.

Evidence-Based

Reflecting legislation, guidance, and best practice.

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4. Training Objectives

The organisation will seek to ensure that employees and volunteers:

- Understand their roles and responsibilities.
- Deliver services safely and effectively.

- Maintain professional standards.
- Understand safeguarding obligations.
- Promote wellbeing and inclusion.
- Work within organisational policies and procedures.
- Continue developing their skills and knowledge.

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5. Induction Training

All new employees and volunteers must complete an induction programme before undertaking unsupervised activities.

Induction should include:

- Introduction to the organisation.
- Organisational values.
- Role responsibilities.
- Safeguarding.
- Health and safety.
- Confidentiality.
- Data protection.
- Professional boundaries.
- Incident reporting.
- Lone working arrangements.

Induction completion should be recorded.

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6. Mandatory Training

Mandatory training may include:

Safeguarding Adults

Recognising and reporting abuse and neglect.

Health and Safety

Safe working practices and hazard awareness.

Data Protection and GDPR

Protection of confidential information.

Equality, Diversity and Inclusion

Promoting fair and inclusive practice.

Mental Capacity Awareness

Supporting decision-making and consent.

Lone Working

Personal safety and risk management.

Incident Reporting

Recording and reporting concerns appropriately.

Mandatory training requirements should be reviewed regularly.

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7. Role-Specific Training

Additional training may be provided based upon responsibilities and service needs.

Examples include:

- Volunteer coordination.
- Risk assessment.
- Supervision skills.
- Community engagement.
- Dementia awareness.
- Communication skills.
- Mental health awareness.
- Financial safeguarding.

Training should be relevant to role requirements.

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8. Identifying Learning Needs

Learning needs may be identified through:

- Supervision sessions.

- Appraisals.
- Competency assessments.
- Incident reviews.
- Complaints investigations.
- Safeguarding reviews.
- Policy updates.
- Volunteer feedback.
- Service development initiatives.

Learning needs should be recorded and reviewed appropriately.

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9. Training Plans

Managers may develop individual training plans that include:

- Required training.
- Development goals.
- Target completion dates.
- Review dates.

Training plans should support both organisational and individual development needs.

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10. Learning Methods

Learning may be delivered through:

- Face-to-face training.
- Online learning.
- Workshops.
- Group discussions.
- Supervision.
- Coaching.
- Mentoring.
- Reading materials.

- Reflective practice.

A combination of learning methods may be used.

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11. Competency Assessment

Training completion alone does not automatically demonstrate competence.

Competency assessment helps ensure that learning has been understood and can be applied in practice.

Competence may include:

- Knowledge.
- Practical skills.
- Professional behaviour.
- Decision-making ability.
- Safe working practices.

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12. Methods of Competency Assessment

Competency may be assessed through:

- Observation.
- Discussion.
- Practical exercises.
- Questioning.
- Reflective discussions.
- Scenario-based activities.
- Review of records.
- Supervision sessions.

Assessment methods should be appropriate to the role.

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13. Safeguarding Competency

Individuals should demonstrate understanding of:

- Types of abuse.
- Reporting procedures.
- Recording standards.
- Professional boundaries.
- Escalation processes.

Safeguarding competency should be reviewed periodically.

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14. Health and Safety Competency

Competency assessments may consider:

- Risk awareness.
- Lone working procedures.
- Incident reporting.
- Emergency procedures.
- Safe working practices.

Managers should ensure employees and volunteers understand relevant responsibilities.

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15. Communication Skills Competency

Employees and volunteers should demonstrate the ability to:

- Communicate respectfully.
- Listen actively.
- Adapt communication to individual needs.
- Promote inclusion.
- Maintain confidentiality.

Communication competency contributes to person-centred service delivery.

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16. Professional Boundaries Competency

Assessment should consider whether individuals understand:

- Appropriate relationships.
- Gifts and hospitality rules.
- Financial safeguarding boundaries.
- Confidentiality obligations.
- Safeguarding expectations.

Maintaining boundaries is essential for safe service delivery.

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17. Refresher Training

Refresher training should be undertaken periodically to:

- Maintain knowledge.
- Reflect legislative changes.
- Reinforce good practice.
- Address emerging risks.

Refresher intervals should be determined according to organisational requirements and subject matter.

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18. Additional Training Following Incidents

Additional training may be required following:

- Incidents.
- Complaints.
- Safeguarding concerns.
- Audit findings.
- Quality assurance reviews.

The focus should be on learning and improvement.

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19. Recording Training

Training records should include:

- Individual's name.

- Course title.
- Date completed.
- Trainer or provider.
- Assessment outcome.
- Renewal date where applicable.

Records should be accurate, secure, and regularly reviewed.

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20. Certificates and Evidence

Where training certificates are provided:

- Copies should be retained where appropriate.
- Expiry dates should be monitored.
- Compliance should be tracked.

Evidence should be maintained in training records.

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21. Non-Completion of Training

If mandatory training is not completed:

Step 1

Identify reasons for non-compliance.

Step 2

Provide support where appropriate.

Step 3

Agree revised completion arrangements.

Step 4

Monitor progress.

Step 5

Consider further management action if necessary.

Mandatory training completion is a key organisational requirement.

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22. Supporting Volunteers

Volunteers should receive training appropriate to their role.

Support may include:

- Structured induction.
- Ongoing training opportunities.
- Supervision discussions.
- Refresher learning.
- Wellbeing support.

The organisation recognises the importance of investing in volunteer development.

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23. Reflective Practice

Employees and volunteers are encouraged to engage in reflective practice.

Reflection may involve considering:

- Experiences.
- Challenges encountered.
- Successes.
- Lessons learned.
- Areas for improvement.

Reflective practice supports continuous learning and service improvement.

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24. Appraisal and Development Reviews

Where applicable, appraisals should include discussion of:

- Training completed.
- Learning achievements.
- Competency levels.
- Development goals.
- Future training requirements.

Development discussions should be constructive and supportive.

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25. Training Evaluation

The effectiveness of training may be evaluated through:

- Participant feedback.
- Competency assessments.
- Supervision discussions.
- Service user feedback.
- Audit findings.
- Observation of practice.

Evaluation helps ensure training remains relevant and effective.

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26. Equality and Accessibility

Training should be accessible and inclusive.

Consideration should be given to:

- Communication needs.
- Disability-related adjustments.
- Learning preferences.
- Language requirements.

Reasonable adjustments should be provided where appropriate.

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27. Training, Learning and Competency Flowchart

Identify Learning Need

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Training Requirement Confirmed

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Training Delivered

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Competency Assessment Completed

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Competent?

Yes → Record Completion → Continue Practice

No → Additional Support and Training

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Reassessment

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Record Outcome

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28. Case Study

Scenario: New Volunteer Completing Safeguarding Training

A newly recruited volunteer completes safeguarding training during induction.

Competency Assessment

The volunteer:

- Correctly identifies different forms of abuse.
- Explains reporting procedures.
- Demonstrates understanding of professional boundaries.
- Successfully completes a safeguarding scenario exercise.

Outcome

Competence is confirmed and the volunteer progresses to service user matching.

Learning Point

Training combined with competency assessment provides assurance that volunteers are prepared for their role.

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29. Responsibilities

Directors

Responsible for:

- Supporting workforce development.

- Ensuring adequate training resources are available.
- Monitoring organisational compliance.

Managers

Responsible for:

- Identifying learning needs.
- Monitoring training completion.
- Assessing competence.
- Supporting development.

Employees

Responsible for:

- Attending required training.
- Participating in assessments.
- Applying learning in practice.
- Identifying development needs.

Volunteers

Responsible for:

- Completing required training.
- Participating in supervision and learning activities.
- Raising support needs where required.

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30. Monitoring and Quality Assurance

The organisation will monitor:

- Mandatory training compliance.
- Competency assessment completion.
- Training attendance.
- Refresher training completion.
- Audit findings.
- Incident trends.

- Learning and development outcomes.

Monitoring results will be used to improve organisational capability and service quality.

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31. Review Arrangements

This procedure will be reviewed:

- Annually.
- Following significant incidents.
- Following safeguarding reviews.
- Following legislative or regulatory changes.
- Following workforce feedback.

Related Policies

- Learning and Development Policy
- Volunteer Management Policy
- Supervision and Appraisal Policy
- Adult Safeguarding Policy
- Health and Safety Policy
- Quality Assurance and Continuous Improvement Policy
- Employee Wellbeing Policy
- Volunteer Recruitment, Induction and Supervision Procedure

Associated Policies

- Learning and Development Policy
- Volunteer Management Policy
- Adult Safeguarding Policy
- Health and Safety Policy
- Quality Assurance and Continuous Improvement Policy
- Employee Wellbeing Policy