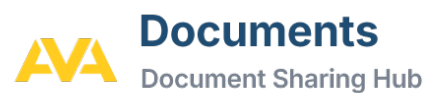


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Guide to learning and development



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Summary of pages

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Foreword

Publishing information

This Published Document is published by BSI Standards Limited, under licence from The British Standards Institution, and came into effect on 30 April 2017. It was prepared under the authority of Technical Committee HCS/1, *Human capital*. A list of organizations represented on this committee can be obtained on request to its secretary.

Use of this document

This publication is not to be regarded as a British Standard.

As a guide, this Published Document takes the form of guidance and recommendations. It should not be quoted as if it were a specification or a code of practice and claims of compliance cannot be made to it.

Presentational conventions

The guidance in this Published Document is presented in roman (i.e. upright) type. Any recommendations are expressed in sentences in which the principal auxiliary verb is “should”.

Commentary, explanation and general informative material is presented in smaller italic type, and does not constitute a normative element.

Contractual and legal considerations

This publication does not purport to include all the necessary provisions of a contract. Users are responsible for its correct application.

Compliance with a Published Document cannot confer immunity from legal obligations.

0 Introduction

In the rapidly changing and evolving environment in which organizations operate, there is a need for effective learning and development to maximize opportunities for individuals and organizations to adapt to change and shape their future. Organizations that successfully support learning and development recognize that it happens throughout the day, not just in classrooms and other formal learning events. Such organizations introduce structures to support learning, rather than to dictate it.

The knowledge, skills and abilities of individuals are valuable assets in which organizations invest to create value for the individuals, the organization and its stakeholders.

This requires an understanding of the importance of:

- a) a collaborative organizational culture that values knowledge-sharing and supports learning across the workforce;
- b) an approach to learning and development that is effectively designed, implemented and evaluated;
- c) an awareness of which learning and development interventions are the most effective in a given situation;
- d) creativity, innovation and flexibility in the delivery of skills and knowledge through design, delivery and assessment; and
- e) individual and organizational capability and aspiration.

This Published Document provides guidance on approaches to learning and development that enable an organization to demonstrate its commitment to valuing people.

It is informed by and shares the principles contained in BS 76000, including:

- 1) people working on behalf of the organization have intrinsic value, in addition to their protections under the law or in regulation, which need to be respected;
- 2) stakeholders and their interests are integral to the best interests of the organization;
- 3) every organization is part of a wider society and has a responsibility to respect its social contract as a corporate citizen and operate in a manner that is sustainable;
- 4) a commitment to valuing people who work on behalf of the organization and to following the guidance of this Published Document, which is made and supported at the highest level;
- 5) each principle is of equal importance.

This Published Document defines value as the merit and worth of people, taking into account the actual or potential contribution that people at all levels in the organization make as a result of their unique capabilities, knowledge, skills, networks, experience, attitudes and insights. It is not confined to the calculation of directly quantifiable monetary value, transactional utility or short-term return on investment.

To fully value the knowledge, skills and abilities of the workforce also requires tangible means of assessing and evaluating the impact of these skills and capabilities, with a focus on the present and the future. The aim of this Published Document is to promote dialogue on learning and development issues amongst a broad range of stakeholders with regard to:

- a) influencing;
- b) engaging;
- c) consulting; and

d) aligning learning and development expectations.

to ensure that the learning and development investments are directed towards the continuous improvement of individual, collective and organizational performance and success.

1 Scope

This Published Document provides guidance on reviewing, assessing and undertaking a competent and principled approach to learning and development for organizations of all sectors, sizes and levels of maturity.

NOTE The way that learning and development is undertaken depends on such factors as the organization's strategic policies, the nature of its activities and the risks and complexity of its operations.

This Published Document is applicable to anyone involved in organizational learning and development, as well as those involved in leadership and management. It is also relevant to stakeholders, including all those who work on behalf of the organization, contracted workers, trade unions or workforce associations and networks, community leaders, customers, clients and investors.

This Published Document is applicable to all organizations regardless of type, size, nature and complexity of business, and whether in the public, private or voluntary sector.

2 Normative references

The following referenced documents are indispensable for the application of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

BS 76000:2015, *Human resource — Valuing people — Management system — Requirements and guidance*

3 Terms and definitions

For the purposes of this Published Document, the terms and definitions given in BS 76000 and the following apply.

3.1 buddy system

mechanism used in an organization to assist new starters to expediently acclimatize to their new organizational environment and role

NOTE A buddy system involves pairing a new starter with an existing team member to assist them, e.g. address any questions.

3.2 context

situation in which something is learned or understood

NOTE This can have a positive or negative impact, e.g. a lack of time or resources to apply learning might negatively impact a learner's experience. Having a supportive manager when learning something highly relevant can positively impact learning experience.

3.3 development

process that brings out or enhances the actual or potential capabilities, knowledge, experience, skills, attitudes or insights of a person or organization

3.4 evaluation

formal or informal assessment of the quality, effectiveness and impact of learning processes

3.5 learning

product in terms of growth and fulfilment (knowledge, skills and behaviours) or a process by which behaviour is changed and shaped

3.6 learning environment

infrastructure and/or facilities that support individuals' learning

NOTE Examples include IT systems that allow individuals to store electronic-based learning materials such as e-books.

3.7 learning needs analysis

methodical approach to analyse and identify individuals' learning and development needs

NOTE This process is usually undertaken as part of other organizational processes such as performance appraisal, or in response to a change in the organization, e.g. new technology, ways of working, policies or risks.

3.8 learning provider

internal or external person or group providing learning products, solutions and services

3.9 organization

person or group of people that has its own functions with responsibilities, authorities and relationships to achieve its objectives

NOTE The concept of "organization" includes, but is not limited to, a small/micro, medium or large company, corporation, firm, enterprise, authority, partnership, charity or institution, or part or combination thereof, whether incorporated or not, public or private.

[SOURCE: ISO/IEC Annex SL:2012, 3.01]

3.10 performance management

organization-wide process to establish shared understanding about what is to be achieved and the mechanisms for leading and developing people to ensure it is successfully carried out

3.11 performance review

part of an organization's performance management system that involves assessing individuals' job performance, and setting and agreeing new goals

NOTE This process might involve identifying individuals' learning and development needs to help them attain their new goals.

3.12 stakeholder

person or collection of people who have an interest in the organization and who can affect, be affected by, or perceive themselves to be affected by a decision or activity

3.13 stretch assignment

project or task given to an individual beyond their current knowledge or skills level

NOTE A stretch assignment challenges the individual through working in unfamiliar situations to encourage learning and development.

3.14 training

organized activity aimed at helping individuals attain the required level of knowledge, skill or behaviours to improve performance

3.15 value

merit and worth of individuals due to their unique knowledge, skills and abilities

NOTE The term, inherent value, in this Published Document refers to the principle that people are valued for who they are, not just because they deliver monetary value or money equivalents to their organization.

[SOURCE: BS 76000:2015, 3.26]

4 Individual level learning and development

4.1 General

Although learning is a natural process, individuals usually do not learn as effectively as they should or can. The way that individuals learn is influenced by context, priorities, opportunities and available resources. A range of different personal factors might encourage learning, as well as have an effect on the outcomes of learning (see [Table 1](#) and 4.2 to 4.4).

Table 1 — *Learning and development: context, enablers and outcomes*

	Individual level	Organizational level
Context/Priorities	– Operational objectives – Position within the organization – Career aspirations – Personal learning preferences and needs	– Legal/regulatory – Sector specific – Business opportunities – Business continuity/risk issues – Strategic priorities
Enablers	– Time availability – Collaborative working opportunities – Job design	– Organizational and management support for learning and development – Resources and policies – Constructive feedback processes
Outcomes	– Increased skills – Knowledge – Appropriate behaviours – Increased capability – Change-readiness	– Organizational resilience and adaptability – Enhanced performance – Workforce engagement – Talent development

4.2 Context and priorities

4.2.1 General

Learning and development is a shared responsibility between the individual and the organization. Individuals can learn all the time as their development is ongoing. The learning undertaken is informed by the needs of the individual, by operational objectives that are relevant to the individual and their role and career aspirations.

4.2.2 Triggers of learning

Learning, at an individual level, is important when individuals:

- are learning how to do something for the first time;