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Learning and development strategy and policy

Understand how to create and implement a learning and development strategy and policy to support organisational success

Introduction

A learning and development (L&D) strategy outlines how an organisation develops its workforce's capabilities, skills and competencies to remain successful. It's a key part of the overall business strategy.

This factsheet looks at the influences on learning and development strategy: business strategy, operational and cultural factors, keeping strategy updated, and how this translates into policy. It also examines the different stakeholders involved in organisational learning and development. Finally, the factsheet considers the practical elements of implementing an L&D strategy and policy.

The CIPD is at the heart of change happening across L&D, supporting practitioners in providing insights and resources. Connect with us through our Leading in Learning network.

What is a learning and development strategy?

A learning and development (L&D) strategy sets out the workforce capabilities, skills and competencies the organisation needs, and how they can be developed to ensure a sustainable, successful organisation.

Organisations need to adapt to changing labour markets and our Creating learning

cultures report highlights L&Ds pivitol role in this. The report also emphasises the importance of strategic human resource management aligning to the overall business strategy.

The L&D strategy has to reflect the overall business strategy and drive progress directly towards that. It must also align with the broad people strategy and align with other strategies (for example, recruitment). We explored more on this in our Valuing your Talent research programme.

When developing a strategy, it's useful to adopt the financial and operational language of business. This helps L&D to be understood widely across the organisation. With good financial and operational 'savvy', L&D professionals can also challenge decisions that risk damaging organisational value and employee engagement.

The core of an L&D strategy will be meeting the organisation's performance needs through the development of its employees. In practice, it may focus on those identified as high-performing or high-potential individuals ('talent'), who are critical to long-term success. This can typically include mentoring programmes with senior leaders, in-house development programmes and project-based learning. Some organisations have a broader range of interventions, adopting a more inclusive approach to employee development. Find out more on managing talent.

Listen to our podcasts on aligning L&D with business objectives, evidence-based L&D and today's learning organisations.

Explore different elements of L&D strategy and policy in our Profession Map.

Learning and development strategy in the time of coronavirus

The COVID-19 pandemic has raised challenges for L&D professionals and highlighted the need for responsive strategies. L&D teams need to work closely with senior managers and other people professionals to meet the changing needs of their employees. Developing people working remotely and the challenge of ensuring equality of access to learning through technology are two highlighted issues.

Listen to our learning cultures webinar and what it means for learning and development post-COVID-19. Our Impact of COVID-19 on the L&D profession report reveals the lessons learnt as L&D professionals adapted their practices in response to the pandemic. There's more on what employers should be doing in our Responding to the coronavirus hub.

Influences on learning and development strategy

Business strategy

The starting point for an effective L&D strategy is to recognise the internal and external context of the organisation. This includes the industry, business needs and the rationale that drives overall organisational strategy. Some examples might be:

- The unique business offer and it's competitive advantage.
- Changes predicted in the business environment – the rate of growth or decline, the competition and the degree of technological change.
- The need to change and adapt to economic circumstances.
- How customers are served and the nature of their expectations.

Our research L&D: new challenges, new approaches showed that key drivers of change across economic, social and cultural, and technological dimensions are having a profound impact on organisations. Evaluating the impact of these trends is the first step in building an effective L&D strategy.

Operational factors and the learning environment

As well as reflecting the business aim, the L&D strategy must align with organisational culture and address operational realities and constraints. Our research on learning cultures explores this and offers actions to embed learning at an organisational, team and individual level to create a positive learning environment. Examples include:

- All work is a process of continual learning and improvement – this can be the starting point for creating a positive learning environment.

- Expenditure on learning and development is encouraged only where there's measurable benefit to the organisation. This doesn't always mean a 'bottom line' commercial benefit. Engaging employees in a continuous learning journey might be seen as a means to drive performance with an engaged workforce.

- Learning is targeted on performance needs and aligned to key performance indicators.

- Learning and development may cover more than a narrow definition of business benefit – they can support the organisation's wider social agenda (for example, by

- taking community needs into account when offering apprenticeships).

- L&D professionals need to work closely with line managers to provide time and space for learning and learning transfer.

- Personal career development can be critical for retention.

- Personal career development is critical for retention and engagement and should ideally be linked to business objectives.

- L&D professionals need to evaluate existing channels of learning to ensure they meet organisational, team and individual needs.

- L&D teams must be part of a wider business strategy of ongoing investment in people, ultimately with a view of benefits to customers and the customer experience.

Keeping strategy updated

The L&D strategy and the associated policies and programmes must be kept up to date as the business environment changes and as data is gathered on the effectiveness of learning activities. This is particularly important to avoid 'regularly-run learning programmes failing to keep pace with changing needs. Our Learning and skills at work report shows that L&D strategies have had to evolve through the COVID-19 pandemic to ensure they are not only current for their organisation but also benefit from wider developments in L&D practice. Our Profession Map shows the importance of creating and valuing a learning culture that supports continuing professional development.

Stakeholders in organisational learning and development

Alignment with the organisation's goals is critical in delivering an L&D strategy. Without it, L&D may not achieve senior stakeholder support. Equally important is engagement with line managers, as well, of course, with the learners themselves.

Three key tests for an L&D strategy aligned to the business and organisational outcomes are:

- **Relevance**: how the strategy will meet opportunities and challenges for the business
- **Alignment**: how the strategy aligns to other strategies in the business , for example HR and finance
- **Measurement**: how the strategy will be evaluated effectively and consistently.

Our Learning and skills at work report shows L&D is getting closer to aligning with organisational priorities, and has role-modelled agility in its provision, but there's still a gap in these three areas.

Allocating responsibility for learning

Only individuals can learn, and only they can choose to apply their new knowledge, skills and behaviours to their work. However, the organisation has a responsibility to set out the aim and purpose of learning. It needs to give support via investment in time and resources to allow learning to happen. The L&D strategy may be managed by the HR team, by a specialist L&D team or an operational lead, but it needs managers and individuals to execute it.

However, not all of the investment in learning will be managed by people professionals (especially in smaller organisations), and others, will be responsible too.

The role of line managers

Line managers are crucial as the gatekeepers to individual learning and development so it's imperative they have support for their own development, as well as their role in developing others. People development is a fundamental part of any manager's role. Where there's recognition and reward for these responsibilities, it's more likely that line managers will give high-quality time to developing their teams. Involving line managers is most effective when L&D responsibilities are a core element of leadership expectations.

Translating the learning strategy into policy and action

While an L&D strategy is a statement of intent, detail is needed to provide guidance on how it'll be implemented and who will turn it into practice. To do this many organisations have a separate L&D policy that sets out some broad parameters for accessing L&D resources.

Policy outline

Organisations need to decide how evolving organisational, team and individual learning needs are analysed against performance gaps and planned goals. From this analysis, priorities will emerge to address these gaps. These priorities are often set out in a learning policy which details how the strategy will be implemented. Typically, an L&D

policy covers:

- Responsibilities for learning and development.
- Personal Development Plans.
- The range of methods used to facilitate learning and development.
- Access to a range of learning opportunities and resources (both formal and informal).
- Equality of opportunity in learning and development.
- internal and external provision.
- Booking formal training and enrolling on qualifications.
- Travel, subsistence and hotels if the learning involves face-to-face interventions carried out elsewhere.
- Cancellation issues.
- Evaluation and monitoring of learning and development.

The policy needs to be effective for the whole organisation, not just the L&D professionals. It should also be reviewed regularly in line with organisation changes.

Performance management and appraisal

Using performance management and performance reviews effectively can key to line managers achieving business targets and ensuring their teams have the right level of capability to deliver performance.

Individual development needs may be included in appraisal or development reviews and be based on learning goals and personal development plans. Be sure to factor the agility to respond quickly and appropriately to regular manager meetings with staff into the L&D strategy.

Resources for learning and development

Budgets and resource planning are clearly critical to implement an L&D strategy effectively. Being open minded to what can be achieved with little or no budget is useful. Learning strategies can benefit from harnessing the knowledge that already exists within an organisation. Read our costing and benchmarking learning and development factsheet.

What kind of learning methods?

Questions that may help determine the nature of learning and development include:

- What methods and modes of delivery will be used for example, face to face, digital or

a blend, formal or informal, coaching and/ or mentoring, curated resources?

- What relationship is there between learning and formal qualifications, for example, is learning be accredited by educational institutions?

- Are any of the government-backed and regional funding programmes appropriate to meet learning needs within the organisation?

- What can learners do to enable them to continue applying the learning?

Read our learning methods factsheet.

Impact, engagement and transfer

Given that effective implementation of the L&D strategy is critical to an organisation's success, it's essential to regularly review and assess the use of learning activities. The impact of the strategy and policy must be measured. Deciding how engagement and transfer will be recorded and assessed before the learning takes place is part of any L&D strategy. Find out more in our factsheet on evaluating learning and development.

Innovation

In mature economies, innovation is critical. Organisations are constantly seeking to innovate and find new solutions to the challenges they face. L&D strategy needs to specifically address innovation and will need an agile, iterative approach with regular reviews to match the changing needs of the business.

Fairness and equity

The L&D strategy and policy needs to ensure there's no discrimination in accessing learning resources. Some organisations offer extra resources to develop the skills of under-represented groups. Creating an ethically sound L&D strategy will encourage all to engage with learning and is sound business practice. See more on equality issues in our factsheet on inclusion and diversity in the workplace.

Further reading

Books and reports

BEEVERS, K., REA, A. and HAYDEN, D. (2019) *Learning and development practice in the workplace*. 4thd ed. London: CIPD and Kogan Page.

HOYLE, R. (2015) *Informal learning in organisations*. London: Kogan Page.

LANCASTER, A. (2019) *Driving performance through learning*. London: Kogan Page.

OVERTON, L. (2016) *Unlocking potential: releasing the potential of the business and its people through learning*. London: Towards Maturity.

PARRY-SLATER, M. (2020) *The learning and development handbook*. London: Kogan Page.

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Journal articles

BEN-HUR, S., JAWORSKI, B. and GRAY, D. (2015) Aligning corporate learning with strategy. *MIT Sloan Management Review*. Vol 57, No 1, Fall. pp53-59.

FARAGHER, J. (2018) Why fresh approaches to L&D are presenting new problems. *People Management* (online). 25 October.

HOWLETT, E. (2020) How can HR remotely manage... learning and development? *People Management* (online). 9 April.

JENNINGS, C. (2016) Reimagining L&D.*Training Journal.* September. pp36-38.

KETTLEBOROUGH, J. (2013) Build a winning L&D strategy. *Training Journal*. November. pp58-63.

LEWIS., D. (2017) Quarter of workers 'receive no training'.*People Management* (online). 6 November.

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This factsheet was last updated by David Hayden.