

Education and Training Procedures

(to be referenced in Member Management Policy)

1. After the Annual General Meeting (AGM):

- a. Ask the Secretary for a list of the roles and sub-committees that members and non-member tenants (NMTs) were elected to at the AGM
- b. Ask all Sub-committee (S/C) Coordinators (Constitutional Review; Executive; Finance; Maintenance; Member Tenant Selection; and Newsletter) for:
 - Anticipated number and dates of meetings throughout the year
 - Roles of S/C members (as per Job Descriptions)
 - S/C Succession Plan for future roles members and NMTs

2. Annual Training Self Check (TSC)

- a. Each member and non-member tenant to be sent the following a.s.a.p. after the AGM
 - TSC form with deadline for return to Education Officer
 - TSC Covering letter
 - Job Description(s) for current and future role(s)

SEE Appendix A
- b. If no response by deadline, follow up (by letter & email) with a Final Reminder letter and new deadline
- c. If no response by new deadline, give details to Membership Officer for action re breach of membership obligations

3. Draft Annual Individual Training Plan (ITP)

- a. Identify each member's and non-member tenant's relevant training needs using:
 - TSC form and previous training records*
 - Job Specification(s) for current and future role

* Training records should be in the files, but if not can be obtained from Community Partnerships and Growth (CPG) Learning & Development (L&D)
- b. Send a DRAFT ITP form (by letter & email) to each member and non-member with covering letter and deadline, asking them to negotiate training with the Education Officer, then sign and return in a timely manner.

SEE Appendix B
- c. If no response by deadline, follow up (by letter and email) with a Final Reminder letter and new deadline
- d. If no response by second deadline, ask Membership Officer to take action for breach of obligations

4. Confirmation of Signed ITP & Registration Requirements

- a. Send confirmation (by letter & email) to members and non-member tenants to:
 - Confirm annual IPT
 - Remind them they are responsible for registering for training in a timely manner.

- Offer information about external providers where CPG does not offer the training
- Provide a [Finance Committee Expenses form?] if there are course fees
- Ask members and non-member tenants to confirm registration to the Education Officer a.s.a.p.
- Include 'To Whom It May Concern' letter about Merz commitments to show employers etc.

SEE: Appendix C

- b. No response after 30 days, follow up with a phone call and deadline for response
- c. No response by deadline, send Final Reminder (by letter & email) with second response deadline
- d. No response to Final Reminder deadline, ask Membership Officer to take action for breach of obligations

5. Annual Organisational Training Plan

- a. Using spreadsheet template, add details from each ITP after signed
- b. Submit (draft) to MTS S/C for recommendation and approval by Committee of Management (CoM). Deadline for CoM should be in Annual Strategic Plan

6. Confirmation of Registration and Attendance at Training

- a. Contact training providers (CPG and external) and ask them to confirm registrants' attendance

7. Update Member and Non-member records each month prior to MTS S/C meeting

- a. To include: dates of leave, TSC form status, ITP form status, registrations, attendance, follow-up actions

8. Monthly written report to MTS S/C for CoM via Newsletter:

- a. Review of (education-related) Action Statements from minutes of MTS & CoM meetings:
- b. Monthly progress update to include:
 - Number of STC forms returned by deadline to date; name(s) for any outstanding; and action taken
 - Number of ITP forms returned by deadline to date; name(s) for any outstanding; and actions taken
 - Number who have registered for training to date; name(s) for any who have not registered; and action taken
 - Number who have attended training to date; name(s) for any who have not attended; and action taken
- c. Sector Development Forums
- d. CPG calendar update
- e. External providers update
- f. Any Other (education-related) Business

9. Review and Update of Education Policy and Procedures

- a. Table possible improvements at MTS S/C meetings for recommendation to CoM if necessary, and approval

10. Review and update Register of external providers for training not offered by CPG Learning and Development (L&D)

11. Prior to the Annual General Meeting (AGM):

- a. Prepare Education Annual Report (summary of monthly Education Reports)
- b. Regularly research and update Register of external providers for training not offered by Community Partnerships and Growth (CPG) Learning and Development (L&D)

APPENDICES

- A. TSC form and letter
- B. ITP form and letter
- C. ITP Final Reminder
- D. ITP Confirmation, Registration & TWIMC Letter

Merz Housing Co-operative Inc.
2E Pickering Street
BROMPTON SA 5007

[date]

[name]

[street]

[suburb & postcode]

Dear [name]

ANNUAL REVIEW OF LEARNING & DEVELOPMENT NEEDS

Please complete the enclosed Training Self Check (TSC) form attached and return to me by **[day & date]**

The TSC form contains the skills and knowledge required:

- by all members and non-member tenants of the co-operative
- for your current role and/or sub-committee as per the Annual General Meeting elections
- for your proposed future role as per your sub-committee's Succession Plan

PREVIOUS TRAINING RECORDS

My records show you have undertaken the following training since 2012. Can you please let me know if you have done any other training in the past 5 years?

Course	Year Attended

Yours in co-operation

[name]

Merz Education Officer

p [phone]

m [mobile]

e [email]

Training – Self Check (TSC) form

Name _____

Status [] member OR [] non-member tenant

Date issued: __/__/____ Deadline for return to Education Officer: __/__/____

Current Role as per AGM: _____

How many years have you been in this role? _____

What is your next role as per the Succession Plan? _____ in _____ (year)

	Your Knowledge/Skill rating			Importance/Frequency		
	Beginner's level	Intermediate level	Advanced level	Need to use occasionally	Need to use frequently	Need to use all the time
General Skills & Knowledge required by ALL members and non-member tenants						
How to access current Merz Rules and find what you need to know						
How to access current Merz Policies & Procedures and find what you need to know						
Basic administration skills (hard copy & electronic records management & confidentiality)						
Basic computing skills						
Computer applications – word processing						
Computer applications – spreadsheets						
Computer applications - internet						
Computer applications – cloud office						
Skills & Knowledge required for your CURRENT role _____ (from Job Specification attached)	Beginner's level	Intermediate level	Advanced level	Need to use occasionally	Need to use frequently	Need to use all the time

Skills & Knowledge required for your CURRENT role _____ (from Job Specification attached)	Your Knowledge/Skill rating			Importance/Frequency		
	Beginner's level	Intermediate level	Advanced level	Need to use occasionally	Need to use frequently	Need to use all the time

I am also interested in undertaking additional training in:

I am able to offer training to other Merz members in:

Name: _____ **Signature** _____ **Date:** __/__/__

Received by Education Officer: Date: __/__/__

MERZ HOUSING CO-OPERATIVE INC.

2E Pickering Street

BROMPTON SA 5007

[date]

[name]

[street]

[suburb & postcode]

ANNUAL INDIVIDUAL TRAINING PLAN

Dear [name]

Thank you for completing your annual Training Self Check (TSC) form and returning it to me.

I have prepared a DRAFT annual Individual Training Plan (ITP), based on your TSC form, previous training record, Job Specifications for your current (and future) roles, and your sub-committee's Succession Plan.

Please contact me as soon as possible to discuss your training priorities.

Once you have an agreed plan, you need to sign it and return to me as soon as possible.

Please note that members and non-member tenants are obliged to:

- Negotiate and sign an Annual Individual Training Plan with the Education Officer
- Register for, and attend agreed training

The deadline for return of the Individual Training Plan (ITP) form attached is [day & date]

Yours in co-operation,

[name]

Merz Education Officer

p: [phone];

e [email]

Merz Housing Co-operative Inc.

Individual Training Plan

Year	
Name	
Membership Status	<input type="checkbox"/> Member from _____ (year) <input type="checkbox"/> Non-member tenant from __/__/____
Role & Sub-committee	1. _____ S/C: _____ 2. _____ S/C: _____
Considerations	<p>Leave? CoM Approved __/__/____ to __/__/____ CoM Approved __/__/____ to __/__/____</p> <p>Work commitments? (days & times) _____ _____ _____</p> <p>Study commitments? (days & times) _____ _____ _____</p> <p>Special Needs? Please describe: _____ _____ _____ _____ _____ _____ _____</p> <p>__ Participation Agreement? Signed __/__/__</p>

Continued over

NAME				
Agreed Training Activity	Provider: CPG L&D or External	Registration Completed	Attendance Dates	Training Attended
		__/__/__	__/__/__ __/__/__	[] YES [] NO
		__/__/__	__/__/__ __/__/__	[] YES [] NO
		__/__/__	__/__/__ __/__/__	[] YES [] NO
		__/__/__	__/__/__ __/__/__	[] YES [] NO
		__/__/__	__/__/__ __/__/__	[] YES [] NO
		__/__/__	__/__/__ __/__/__	[] YES [] NO

I understand I am obliged to:

- negotiate an agreed Annual Individual Training Plan
- register for training as per this plan
- attend training as per this plan
- Inform the training provider and the Education Officer as soon as practicable if I am unable to attend training

Member/Non-member Tenant: Signature: _____ Date __/__/__

Education Officer: Signature: _____ Date __/__/__

EDUCATION OFFICER RECORDS

Date	Action

MERZ HOUSING CO-OPERATIVE INC.

2E Pickering Street

BROMPTON SA 5007

[date]

[name]

[street]

[suburb & postcode]

REGISTERING FOR TRAINING AS PER YOUR ITP

Dear [name]

Please find a copy of your signed annual Individual Training Plan (ITP).

You need to register to attend the listed training as soon as practicable.

You can register for training offered by Community Partnerships and Growth (CPG) Learning and Development (L&D) either via the links on the website www.communityhousing.sa.gov.au, or by phoning [??????].

Where training is not offered by CPG L&D, I have provided details of some external providers you can contact. Please let me know me as soon as possible if they are not suitable.

If your training involves a fee, you must apply for Merz to pay the fee on your behalf, or reimburse you. Please complete the attached form and send to me so it can be approved in a timely manner to ensure you are not out of pocket.

Please inform me when you complete a registration, and let me know the attendance dates.

Yours in co-operation,

[name]

Merz Education Officer

p: [phone];

m: [mobile]

e [email]

Attachments: Copy of signed Annual Individual Training Plan

Requisition form (to be provided by FINANCE?????)

List of External Providers (where necessary)

TWIMC letter re Merz commitments for employers etc.

MERZ HOUSING CO-OPERATIVE INC.

2E Pickering Street

BROMPTON SA 5007

[date]

TO WHOM IT MAY CONCERN

[name]

[name] is a tenant of Merz Housing Co-operative Inc., which provides affordable housing for members and non-member tenants hoping to become members.

Housing is linked to membership, and obligations of membership include attending meetings, and undertaking necessary training and education.

The co-operative seeks your understanding and support in allowing [name] to attend the following, so [he/she] can fulfil their requirements to become or continue as a member and tenant of Merz.

Meetings	Date
Annual General Meeting	September – third Monday of the month unless otherwise advised
General Meeting	Monthly – third Monday of the month unless otherwise advised
Special General Meeting	As required – to be advised
[Specify] Sub-Committee Meeting	Monthly - as advised
Training Courses	Date

Yours co-operatively

[name]

Merz Education Officer

[phone], [mobile], [email]