

STUDY LEAVE & FUNDING POLICY FOR ALL LEARNING & DEVELOPMENT

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Review Responsibility	Associate Director of Human Resources & Corporate Services
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REVISIONS/AMENDMENTS SINCE LAST VERSION

Date of Review	Amendment Details
December 2013	<p>The original PCT document has been revised to:</p> <ul style="list-style-type: none">• Reflect the Clinical Commissioning Group Establishment• Reflect the Clinical Commissioning Group structure• Align to the Clinical Commissioning Group Human Resources and Organisational Development Policies and procedures•
July 2017	<p>The CCG document has been reviewed and revised to;</p> <ul style="list-style-type: none">• Reflect changes in accountability and responsibility regarding applications for funding/study leave.• Remove reference to KSF which is now obsolete• Amend the study leave application process to reflect the changes in CCG Structure and process.• Reflect changes in legislation.

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Definitions

Term	Definition
ESR	Electronic Staff Record – a workforce and learning management system for the NHS
SSPRD	Specialist Skills and Post-Registration Development, formally Learning Beyond Registration (LBR) funded by Health Education England (HEE)
OLM	Oracle Learning Management – a learning management system that enables organisations to manage, deliver and track training activity.
PDP	Personal Development Plan – this supports employees where necessary to enhance existing skills or knowledge, and/or develop new skills or areas of expertise.
PDR	Personal Development Review – the process of reviewing, planning, developing and evaluating how the employee is applying their knowledge and skills to meet the demands of the post and what development opportunities have been undertaken and how these have helped the employee to become more effective.

SECTION A – POLICY

1. Policy Statement, Aims and Objectives

- 1.1 NHS Doncaster Clinical Commissioning Group (CCG) recognises that employees are our most important asset and we are committed to developing and supporting employees to achieve their full potential. The organisation fosters a culture that promotes lifelong learning and offers appropriate frameworks to enable employees to extend their skills and knowledge and will ensure fairness and equity of opportunity in the uptake of education and training.
- 1.2 This policy will ensure all employees are aware of how they can access study leave and funding. It provides guidance for employees and managers on the approval process and the provisions available for funding.
- 1.3 The aims of the policy are:
 - To establish the purpose of learning and development
 - To describe the criteria for leave/funding for learning and development
 - To provide a clear process for study leave application including templates
 - To describe learning and development opportunities
 - To outline funding opportunities available
 -
- 1.4 This policy should be used in conjunction with Personal Development Review process, Human Resources Strategy and Organisational Development Strategy.

2. Legislation and Guidance

- 2.1 The following guidance has been taken into consideration in the development of this procedural document.

The NHS Learning for Life Campaign – The Social Partnership Forum with NHS Employers, Trade Unions, Department of Health and Skills for Health deliver this campaign which promotes workplace learning.

3. Scope

- 3.1 This policy applies to those members of staff that are directly employed by NHS Doncaster CCG and for whom NHS Doncaster CCG has legal responsibility. For those staff covered by a letter of authority / honorary contract or work experience this policy is also applicable whilst undertaking duties on behalf of NHS Doncaster CCG or working on NHS Doncaster CCG premises and forms part of their arrangements with NHS Doncaster CCG. As part of good employment practice, agency workers are also required to abide by NHS Doncaster CCG policies and procedures, as appropriate, to ensure their health, safety and welfare whilst undertaking work for NHS Doncaster CCG.

4. Accountabilities and Responsibilities

4.1 Overall accountability for ensuring that there are systems and processes to manage study leave and funding application lies with the Chief Officer. Responsibility is delegated to the following:

<p style="text-align: center;">Associate Director of HR & Corporate Services</p>	<p>Has delegated responsibility for:</p> <ul style="list-style-type: none"> • Maintaining an overview of the corporate ratification and governance process associated with the policy. • Management of the service level agreement with Doncaster Clinical Commissioning Group (DCCG) in relation to Organisational Development and securing external funding for learning and development. • Leading the development, implementation and review of the policy. • Ensuring study leave records are kept in personal files • Management of ESR and OLM • Provision of advice on appropriate funding streams • Dealing with general enquiries regarding training and education needs including bespoke models of education • Supporting access to mandatory and statutory training • Supporting the application process for Support Staff Learning and Development • Supporting the application process for Learning Beyond Registration/Specialist Skills and Post-Registration Development
<p style="text-align: center;">Associate Director of HR & Corporate Services, with relevant Chief / Director</p>	<p>Have delegated responsibility for:</p> <ul style="list-style-type: none"> • Management of a learning and development budget for employees under their management • Ensuring there are equal opportunities for study leave and funding • Considering the implications of learning and development on the workload of the service and the impact on the release of staff

	<ul style="list-style-type: none"> • Approval of study leave for their own staff • Submitting associated documents to HR for retention on personal files.
Appointing Officers	<p>Have delegated responsibility for:</p> <ul style="list-style-type: none"> • Ensuring employees undertake mandatory and statutory training at prescribed periods noting that this takes priority over any other training • Ensuring employees are supported to access mandatory and statutory training. • Ensuring that each employee has an agreed Personal Development Plan arising from their Personal Development Review • Completing the study leave/funding application form (appendix 3) in partnership with the employee before submission to appropriate Head of Department.
All Staff	<p>Have delegated responsibility for:</p> <ul style="list-style-type: none"> • Completion of the study leave/funding application form for all learning and development programmes including conferences, seminars etc. in partnership with their line manager. • Submissions of the study leave/funding application form to appropriate Head of Department • Accessing relevant mandatory and statutory training. • Active participation in all sessions for which study leave has been granted.
Staff Side	<p>Have responsibility to: Ensure they are familiar with the policy and procedure Advise and represent employees who are members of a recognised Trade Union</p>

5. Dissemination, Training and Review

5.1 Dissemination

5.1.1 The effective implementation of this procedural document will support openness and transparency. NHS Doncaster CCG will:

- Ensure all staff and stakeholders have access to a copy of this procedural document via the organisation's website.
- Communicate to staff any relevant action to be taken via staff briefings/email.

5.1.2 This procedural document is located on the intranet. A set of hard copy Procedural Document Manuals are held by the Governance Team for business continuity purposes and all procedural documents are available via the organisation's website. Staff are notified by email of new or updated procedural documents. Key linked documents are the Induction, Mandatory and Statutory Training Policy and the Personal Development Procedure. Other documents include the Human Resources Strategy and Organisation Development Strategy.

5.2 Training

5.2.1 All staff will be offered relevant training commensurate with their duties and responsibilities. Staff requiring support should speak to their line manager in the first instance. Support may also be obtained through the HR Department.

5.3 Review

5.3.1 As part of its development, this procedural document and its impact on staff, patients and the public has been reviewed in line with NHS Doncaster CCG's Equality Duties. The purpose of the assessment is to identify and if possible remove any disproportionate adverse impact on employees, patients and the public on the grounds of the protected characteristics under the Equality Act.

5.3.2 The procedural document will be reviewed every three years, and in accordance with the following on an as and when required basis:

- Legislatives changes
- Good practice guidelines
- Case Law
- Significant incidents reported
- New vulnerabilities identified
- Changes to organisational infrastructure
- Changes in practice

5.3.3 Procedural document management will be performance monitored to ensure that procedural documents are in-date and relevant to the core business of the CCG. The results will be published in the regular Governance Reports.

SECTION B – PROCEDURE

1. Requesting Leave/Funding for training

1.1 The employee should complete the study leave/funding application form (appendix 3) in partnership with their Line Manager. All completed application forms should clearly outline the nature of the learning/development activity, the number of days/hours required and any associated costs. Time off for examinations will be granted and should be included on the form where applicable.

1.2 The purpose of learning and development is to enable employees through a variety of mechanisms to access professional, career and personal development, training and education. Leave/funding for learning and development can, therefore, be requested for the reasons outlined in the following paragraphs.

1.3 Participation in:

- Mandatory and Statutory Training/Update Refresher Training
- Professional/Practice Development
- Personal and Management Development
- Information Technology Training
- Conferences/Seminars/Workshops
- College/University to pursue formal educational qualifications
- Work shadowing/experience opportunities
- Job swap with an individual
- Courses/Workshops/Conference or Seminars which enable policies to be developed/implemented
- Use of library facilities
- E-Learning

2. Approval Process

2.1 It is acknowledged that learning and development activities undertaken should benefit the organisation, the individual, users and patients. It is recognised that the organisations resources are finite and should be utilised fairly and appropriately with access available to all staff.

2.2 Requests for leave/funding will be considered in light of the following:

- Mandatory and Statutory/Clinical Update
- Professional Development that is essential to the service/role
- Career related development
- Personal related development

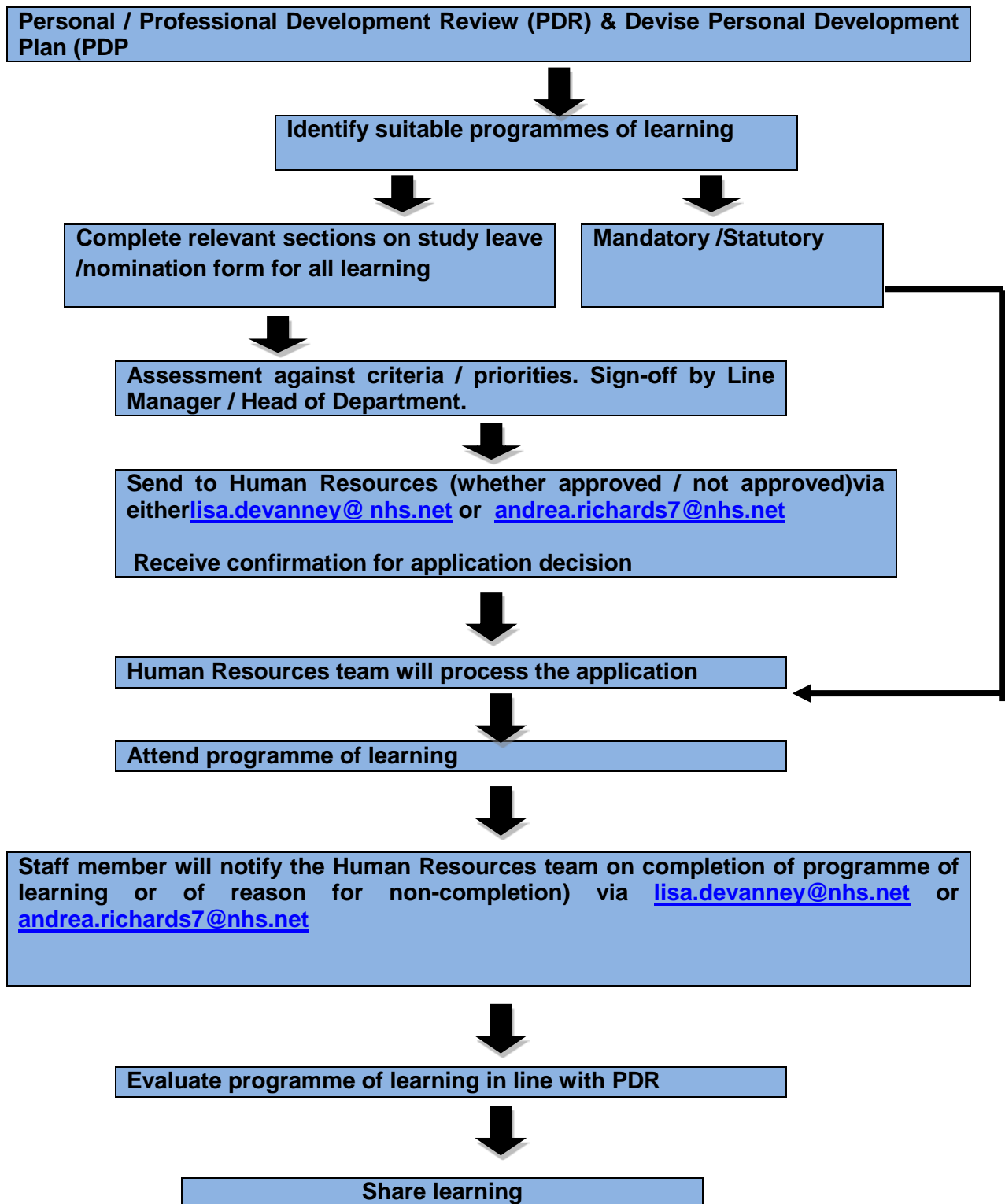
2.3 Allocation for leave/funding will be considered based on the following criteria:

- Mandatory and Statutory Training/Clinical Update – 100% funding support and 100% time commitment granted
 - Professional Development – up to 100% funding support and/or up to 100% time commitment granted
 - Career related development – up to 75% support and/or up to 100% time commitment granted
 - Personal related development – up to 50% funding support and/or up to 50% of time commitment granted
- 2.4 Any remaining funding or time commitment not supported by the organisation should be funded by the employee. Time commitment should be met by the use of annual leave or time in lieu. Any funding required from the employee will be recovered over an agreed period from salaries and must be repaid in full within the current financial year.
- 2.5 Should the employee leave employment with the CCG either during the study or within one year of completion of the study the CCG reserves the right to request reimbursement of the financial contribution made.
- 2.6 The Associate Director of Human Resources & Corporate Services is responsible for the approval of study leave/funding applications in conjunction with relevant Chief's/Directors and for ensuring that the time granted is reasonable, equitable and not to excess or detriment. In addition, it is also their joint responsibility to ensure that the process is underpinned by a review of Personal Development Reviews and Personal Development Plans.
- 2.7 DCCG will provide an overall organisational training needs analysis to support decision making and where there is a requirement to prioritise learning and development in a certain area the organisation reserves the right to adjust the budget allocation.

3 Evaluation of Learning and Development

- 3.1 Before undertaking learning and development activity employees should be clear of what they will gain from undertaking the activity in order for them to effectively evaluate the benefit of the investment made.
- 3.2 The employee should feedback via their Personal Development Review what has been learnt and how the learning has been implemented in the workplace.
- 3.3 Where appropriate learning should be shared with colleagues, for example learning from a conference attendance or workshop

STUDY LEAVE / NOMINATION PROCESS FLOW



LEARNING AND DEVELOPMENT OPPORTUNITIES

NHS Doncaster Clinical Commissioning Group

NHS Doncaster CCG will provide access to a range of e-learning and classroom based training, including mandatory and statutory training and developmental training. Access to e learning is via a smart card and the ESR system. A booking system is in operation for classroom based training and the brochure can be viewed via: <http://nww.intranet.rdash.nhs.uk/support-services/workforce-organisational-development/learning-and-development/learning-and-development-programme/>
Employees should contact lisa.devanney@nhs.net or andrea.richards7@nhs.net to book a place if the first instance.

Time for Audit Review Guidelines Education Training (TARGET)

TARGET is a locally run education scheme which seeks to provide updates and training sessions pertinent to a wide range of healthcare professionals and support staff. The sessions are advertised to all clinical staff groups via an email to all named NHS Doncaster CCG email distribution list in the month prior to the session being run. Staff wishing to access TARGET affiliated sessions should firstly ensure that the session topic is relevant to them. If the topic is not relevant, staff may use this time for self-directed study. For further information on how to access the sessions please contact anthony.fitzgerald3@nhs.net

External Conferences / Seminars

Approval for attendance at external conferences / seminars will be considered by the Line Manager in the first instance. Where it is deemed appropriate, a study leave form will be to be sent to the relevant Department Head to authorise funding. The study leave application form should then be forwarded to the Associate Director of HR & Corporate Affairs/Human Resources Manager. The applicant will be responsible for booking places on such training events.

Professional/Vocational Training

Advice on how to access professional/vocational training and on what is available can be sought from <http://nww.intranet.rdash.nhs.uk/support-services/workforce-organisational-development/learning-and-development/learning-and-development-programme/>

The process of application is via the study leave/funding application form, as per Appendix 1, which must be approved before the employee enrolls on the training directly with the learning provider.

Examinations

Employees will be granted paid time off to attend an examination. If an examination is to take place in the afternoon, the Line Manager, at his/her discretion, may allow the whole day as paid leave. If a staff member fails at the first attempt to obtain the qualification or to pass an intermediate examination, he/she may be supported for a

second attempt only if the Line Manager is satisfied that failure was due to circumstances beyond his/her control and not through any lack of application. A third attempt would only be supported in exceptional circumstances. Members of staff must state on the study leave form whether it is a 1st, 2nd or 3rd attempt.

SECTION 1 PERSONAL DETAILS										
Surname								Forename		
Title	Mr	Mrs	Miss	Ms	Dr	Work address:				
Employee No:										
Job Title:										
Email:					Telephone No:					
SECTION 2 TRAINING/DEVELOPMENT EVENT										
Course Title:										
Is it Internal		Please state source								
Is it External		College/University			Conference		Other (Please state)			
Venue										
No of study days										
Dates					Time					
From										
To										
SECTION 3 REASON FOR TRAINING AND DEVELOPMENT										
Statutory/Mandatory Training							Professional Development			
Career Development							Personal Development			
The above training has been identified at my Performance Development Review							Yes		No	
SECTION 4 LEARNING OUTCOME										
SECTION 4 SHARING LEARNING & DEVELOPMENT										
I understand the requirement to cascade to my colleagues, my learning from attending this event										
Signature of Applicant							Date:			
SECTION 6 APPROVAL										
Line Managers Approval			Yes	No	Signature:					

No of days approved			
Name & Job Title in full			Date
Department Head/Chief of Service Approval	Yes	No	Signature: _____
Name			Date
SECTION 7 FINANCE DETAILS			
Course/Event Fees	£	Please provide details of course provider i.e. check payable to:	
Registration/Exam fees	£		
Do you require a cheque with booking form			Yes No
Travel/Subsistence <i>If known</i>	£	Cost Centre Codes for Travel and Subsistence	
Travel Agreed	Yes No		
Subsistence Agreed	Yes No		
SECTION 8 FUNDING AGGRANGEMENTS/ALLOCATION			
Source	Amount	Cost centre codes	Analysis codes
Learning Beyond Registration/ Specialist skills and Post registration Development			
Support Staff Funding			
Other(specify)			
SECTION 9 CONFIRMATION OF ATTENDANCE			
Confirmation of attendance received by Learning and Development		Date	

GUIDANCE OF COMPLETION OF STUDY LEAVE/FUNDING APPLICATION FORM

Please read these guidelines carefully before completing the application for study leave/funding form

Investment in Learning and Development is crucial to the CCG's plans for Workforce Development and recruitment and retention. It is essential therefore that any expenditure on learning and development, delivers results and contributes towards measurable improvements in service delivery.

By funding learning and development for its staff, the CCG is making a commitment towards helping the individual to achieve their personal development plan, develop their skills and competencies and progress their career within the NHS. Similarly, the individual undertakes a commitment both to share their learning and new skills with their colleagues and to apply it to their day to day work.

It is important to recognise that the benefits from undertaking learning and development are not always immediately apparent and individuals need time to apply what they have learned to their jobs and similarly to reflect on or evaluate the changes to their attitudes, knowledge or behaviour.

WHEN SHOULD THIS FORM BE USED?

This form should be complete for ALL training, educational or development events which require you to take time out from your normal duties and/or you are requested to do so by your manager and/or training provider. There are some exceptions to the rule, so if in doubt speak to your line manager.

WHY SHOULD THIS FORM BE USED?

This form has many uses. It formally acknowledges your leave of absence, it authorises expenses, and it is used to record training and it is used for monitoring training activity. It is essential for your own benefit to have this form completed before you attend a training event(s).

COMPLETING THE FORM	
1.	Personal Details
The information you provide in this section will enable the information to be entered onto your training record. It is therefore important that you complete all sections and in particular your Employee Number (you can find this on your payslip). From time to time we may need to contact you at short notice regarding your Study Leave application – to enable us to do this, please supply telephone contact details.	
2.	Learning and Development Details

It is acknowledged that different course providers will have different requirements regarding course bookings, in order to ensure your place is both booked and paid for, you need to complete the following steps

- At the earliest opportunity complete your Study Leave form and submit to your Line Manager for approval (it is recommended that you keep a copy for your own information).
- You should provisionally book with the provider and confirm booking when you receive authorisation from the appropriate person (please ensure there is no financial penalty should approval not be granted).

3. Reason for Learning and Development

Learning and Development should only be undertaken where it has been identified as part of your development review and is required to meet a genuine service need.

4. Learning Outcome

The Learning outcome should be clearly identified and linked to your Personal Development plans.

5. Sharing Learning and Development

You are required to fill in your name and job title again here as this is to confirm that you agree to cascade information obtained from the learning event.

6. Approval

Study Leave **must** be agreed/approved, in the first instance, by your Line Manager and Department Head/ Chief where appropriate. If this section has not been completed, this may delay the processing of your application.

7. Finance Details & Funding Arrangement

7.1 Learning Beyond Registration/SSPRD

This funding can be utilised to support learning and development activities provided by the local universities and is accessed via the Learning and Development Team.

7.2 Support Funding

Funding is available for clinical and non-clinical support staff to meet both personal development and service needs. All staff who do not possess a work related professional qualification will have access up to NVQ Level 4 and its equivalent.

7.3 Other

Funding is available to support learning and development activity linked to specific development needs, may be ring fenced as part of particular project or post, or internal local training budgets.

FUNDING OPTIONS FOR LEARNING AND DEVELOPMENT OPPORTUNITIES

Specialist Skills and Post Registration Development(SSPRD) formerly known as Learning Beyond Registration (LBR)

This funding can be utilised to support learning and development activities provided by the local universities Education Providers in the Yorkshire and Humber area.

To obtain the funding you must complete a fees and funding form (Individual universities) which must be signed by your line manager and SSPRD/LBR lead. (sherly.gibson@nhs.net)

The funding is granted on a modular basis and needs to be applied for in your academic year of study (so if you are studying with us over multiple years you will need to apply for funding at the start of each year). The funding is available from April and is awarded on a first-come first-served basis, so to avoid disappointment you should apply as soon as possible.

The Education establishments that NHS Doncaster CCG employees can have access to are as follows:

- University of Sheffield
- Sheffield Hallam University
- University of Bradford
- University of Huddersfield
- University of Hull
- University of Leeds
- Leeds Metropolitan University
- Northern School of Child and Adolescent Psychotherapy
- Open University
- University of York
- York St John University
- University of Derby

Please note, the following local Universities are the preferred choice for placements:

- University of Sheffield
- Sheffield Hallam University

Secondment / Bursary / Sponsorship Opportunities

Secondments / bursaries / sponsorships will be advertised by NHS Doncaster CCG for staff to apply as and when they are available. Any member of staff wishing to undertake this type of training must first discuss it with their line manager.

Travel Expenses Associated with Study leave

Payment of expenses can only be made within the limits imposed by current regulations.

In accordance with NHS terms and conditions of service only travel expenses in excess of the normal cost of travelling to work will be paid.

Applicants should state how they propose to travel i.e. Train, bus, own car or as a passenger in someone else's car on the study leave application form. Full advantage must be taken of available cheap fares and car sharing.

Taxi or cab fares and any reasonable gratuity shall be payable only in cases of urgency or in others cases in which transport is reasonably required and an adequate public service is not available, but where these conditioned are not fulfilled an individual using a taxi / cab shall be entitled to claim the sum they would have paid had they travelled by public service vehicle.

Applications should indicate whether an element in respect of accommodation or meals is included in the fee. An official expenses claim should be submitted via the electronic expenses system for approval.

Day release students applying for courses of study leave lasting more than one academic year should make application for the current year only but should indicate that this forms part of a course over a longer period i.e. 'first year of three year OCN course'.

Name:			
Job Title:	Band:	Department:	
Base			

Learning Development Details	
Course/module title	
Start date	
Completion date	

Evaluation details

1. Have you completed the learning / development for which you applied for study leave / funding? If not, please explain why.
2. How did the learning meet your Personal Development needs? Please Explain
3. How did the learning / development meet the Service and Organisational needs?
4. Have you development a plan of action in order to apply new learning to your workplace? Please give examples
5. How will you share this learning / development with your team/organisation?
6. What were the most valuable skills/ learning / development from the programme?

7. What area, if anything, needs improving on the programme?

- Provider
- Facilitator
- Content
- Materials
- Timing
- Environment
- Other

Human Resources will collate this information for audit purposes. Please send your completed form to lisa.devanney@nhs.net or andrea.richards7@nhs.net

This form should be used by the staff member as an aid in the completion and review of Personal Development Review (PDR) in partnership with their line manager.