Worcestershire Acute Hospitals NHS Trust Non-Medical Study Leave Policy

Department/Service	**Human Resources**
Accountable Director	**Chief People Officer**
Date Approved by JNCC	24/10/2024
First Revision Date	24/10/2027
Changes since previous version	• **Formal Learning Agreement has been added which employee is required to sign,** • **PHD have been added to this policy.**
Queries about interpretation and application of policy	wah-tr.hrenquiries@nhs.net
Target Organisation	**Worcestershire Acute Hospitals Trust**
Version	2

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What this policy covers

Worcestershire Acute Hospitals NHS Trust (WAHT) is committed to ensuring that all colleagues have access to the education, learning, and development they need to deliver a better service to patients. Whilst promoting patient safety and quality patient experience.

Education and training are key to developing and retaining a high quality, well-motivated workforce ensuring that colleagues:

- have the skills, knowledge and competence to perform their roles safely
- are as effective as possible in their roles, reflecting latest learning and best practice
- have the opportunity to realise their potential
- training needs will be identified and delivered in accordance with our equal opportunities and inclusion principles
- colleagues will be supported to help them achieve their potential within their current and future roles within the Trust.

Purpose

The purpose of this policy is to provide a framework for the process by which education, learning and development is managed.

The policy provides guidance for colleagues:
- how to apply for education, learning and development
- under what circumstances to apply for education, learning and development
- the information required to proceed with an application for learning and development,
- the responsibilities of employees who are undertaking learning and development
- the responsibilities of their managers
- how education, learning and development will be monitored.

Scope

This policy applies to all colleagues except Medical and Dental colleagues (a separate policy has been agreed for this group).

The policy deals with internal and external education, learning and development only.

Line Managers will need to authorise all study leave.

Where there is cost to the Trust in terms of course fees, exam fees, travel expenses etc. Which is not NHS England/ CPD funded then budget holders as per the scheme of delegation will need to approve study leave application forms (See Appendix A).

Definitions

Education, Learning and Development: the time required away from the work role to attend a formal learning event. For example, a course, workshop or conference or time to take recognised exams or access to e-learning.

Study Leave: is usually paid time that is allocated to support colleagues to meet the development needs identified in their personal development plan or the Service Delivery plan and/or Workforce Development plan.

Informal learning activities: e.g. attending meetings, shadowing, secondments / placements, do not come under this policy.

Responsibilities

Line Managers and Heads of Departments

- To discuss the application with colleagues and to check that the education, learning and development is appropriate and links to the individual' Personal Development Plan and Directorate/Department Training Plan.

- Complete an annual Education, Learning and Development Plan for their Directorate/ Department.

- All Trust line managers and Heads of Department must ensure that they enable colleagues to have dedicated time to be able to complete their required Statutory, Mandatory and Essential to Role training. Managers should facilitate study time as well as attendance to course to complete their Continuous Professional Development education. This should be discussed at the colleague's annual PDR

- Ensure that cover arrangements are made to enable colleagues to be released to complete training.

- In the case of external education, learning and development to request study leave, ensure budget authorisation by the manager, nominated training representative (or equivalent).

- After the education, training and development event, evaluate with the colleague i.e. what they have gained, how they have benefited from the learning and development, what they will do different as a result and how they plan to share their learning with other colleagues.

- Update colleagues' personal file and training record where applicable.

- Ensure colleagues are aware of the commitment they are undertaking when going on study leave and should they fail to attend (in the case of courses incurring fees) inform them that they may be required to meet the course costs unless this is due to unforeseen circumstances / illness.

- Ensure colleagues member complete the Electronic Study Leave Application Form (eSLAF) (Appendix A) and in the case of funded courses fees above £350 they complete the Learning Agreement (Appendix B).

- In authorising education, training and development, ensure that staff have equal access to opportunities to undertake training and development.

Employee Responsibilities

- Complete the electronic study leave form and learning agreement prior to confirming your course booking.

- For PhD – complete the online form along with the research proposal

- Consider why you need to undertake the learning and development i.e. What do you need to learn? What do you intend to do different as a result? How will you share your learning It is recognised that professionals should learn together to work together, to promote shared learning and it is therefore expected, and a condition of study leave that individuals feedback their learning to their colleagues.

- Discuss the study leave with your manager before you complete the electronic study leave application form (eSLAF) – check that they agree it is relevant and that they will approve your time away from the workplace.

- If the course tutor has suggested pre-course reading or you are asked to complete pre-course work – ensure that you do this.

- Make the most of the event by asking questions and participating fully. If the course is not meeting your needs, where possible, make the course tutor aware of this so it can be addressed at the earliest appropriate time and ensure you complete any feedback given.

- Check the course date, start and finish times and ensure that you can attend the whole event. If after booking your place you find you are no longer able to attend the event notify your manager in the first instance so he/she can offer the place to someone else. You will also need to notify the course organiser and the Learning & Development Department of any changes.

- Ensure all statutory and mandatory training is completed and in date prior to submitting your study leave application.

- If, due to unforeseen circumstances, you are unable to attend the event (with less than 48 hours notice) notify the event organiser direct and advise them.

- If you defer your course, it is your responsibility to notify your manager, Learning & Development and the course provider. If you do not complete after the deferment, you may be required to repay costs to date.

- If cancellation costs apply, you may be asked to meet these costs unless you have a justifiable reason for not attending e.g. you are sick.

- Keep a record of the details of the event, telephone numbers etc. and a copy of your study leave application form in case you need to make any enquiries.

- Complete the course evaluation form.

- Record in your Personal Development Portfolio what you have learned and discuss this at your next appraisal.

- Share your learning with others and apply it.

Making an application for Study Leave

An application for learning and development can only be approved if it:

- aims to meet a training and development need that has been identified within an employee's personal development plan
- has been included within the Directorate/ Department Education, Learning and Development Plan.
- is clearly linked to Service Delivery and Workforce Development Plans
- colleague's mandatory training is in date.
- it is essential/mandatory requirement for the specific job role.

Applications that cannot demonstrate the above will not be approved.

Funding Study Leave

Most internal courses do not incur course fees. Where learning and development does involve course fees these may be met in total by the Trust or alternatively the costs may be divided among the Trust, the Directorate and the Employee. Where there is a cost to the Trust it must be approved by the Budget Manager (see scheme of delegation).

Applications for study eave fall broadly into the following categories:

- **Essential:** These are activities that colleagues **must** attend to do their job safely and effectively. These would include Risk Management Updates, Statutory, Mandatory and Role Essential training, Induction, essential training specific to the job role and Continued Professional Development. In these cases, the Trust will support paid study leave and will meet any costs incurred e.g. course fees, travel and subsistence.

- **Desirable:** These are activities that, although relevant to role, they cannot be regarded as 'essential'. These activities can be equally beneficial to both the individual and the Trust. If colleagues are self-funding there should be a discussion with their line manager with regards to study time and possible contribution towards fees, travel or subsistence.

- **Continued Professional Development (CPD):** Education, learning and development which is intended to update, refresh professional knowledge and skills and to maintain competence which is focussed mainly on the current sphere of practice.

- **Post Registration:** Education and learning that takes place after registration.

- **PhD:** CNO Fellowship PhD – a selection process twice a year for PhD's to be undertaken within the trust, this will be supported part time. The selection process will include a dissertation proposal and presentation to a panel to agree approval to proceed to university application. The process is open to all non-medical professionals.

The employee will be required to sign a Learning Agreement (Appendix B) for funding received above £1,000 the Learning Agreement should be signed by the authorising manager and member of staff as part of the approval process.

Where the employee <u>completes</u> a course of study for which the Trust is required to pay the course fees but leaves the Trust within 18 months of having completed the course, they will be required to pay a proportion of course fees as follows:

Within 3 months of completing the course	100% to be repaid
Within 6 months of completing the course	75% to be repaid
Within 12 months of completing the course	50% to be repaid
Within 18 months of completing the course	25% to be repaid

A standard repayment fee will apply to employees <u>failing to complete a course</u>, (other than in exceptional circumstances) which will be 50% of the costs to date.

The Trust is committed to funding all education, training and development wherever possible, and funds will be allocated based on the annual Training Needs Analysis and Development Plans.

Monitoring and Review

Record of any education, training and development activity should be kept as follows:

- in a Personal Development Portfolio
- personal file
- for funded study leave only the study leave form will be held by the Learning & Development Department.

Everyone who undertakes study leave is responsible for keeping their Personal Development Portfolio up to date.

In line with good practice Departments and Line Managers should keep records of staff development and training and development activity within their area of responsibility.

The Learning & Development Department hold records of all funded electronic study leave application forms. They will also hold the Trust Education, Training and Development plans along with the training needs analysis. These records will enable the department to monitor the funded training and provide the Education Faculties with reports on the spend and complete the NHSE quarterly returns.

Appendix A Application for Attending a Learning & Development Event

Application for Attending a Learning & Development Event **All** sections must be completed

Name:	Click here to enter your full name	Email Address:	Click here to enter your email address
Job Title:	Click here to enter your Job Role	Phone:	Click here to enter your contact number
Division:	Click here to enter Division	Employee No:	Click here to enter your employee number
Staff Group:	Click here to enter staff group		***NB: Form cannot be processed without both contact details***

Title of Event/Course: Date(s):	Click here to enter Course/Event Title Click here to enter start date. Click here to enter end date. No. of Study Days	*Please ensure full and correct Course Title is stated and start/end dates*

Your Mandatory Training Compliance **(Applies to all staff)**	Fire Safety	**Expiry Date**	**Renewal Period**	*Please enter your expiry date of the competency from your compliance matrix in ESR.* ***Please note if you are out of date with ANY of your mandatory training your Study Leave will automatically be rejected***
		Click to enter expiry date	Annually	
	Infection, Prevention & Control	Click to enter expiry date	Annually or Level 1 - 3 yearly	
	Information Governance	Click to enter expiry date	Annually	
	Moving & Handling	Click to enter expiry date	Every 2 years or Level 1 3 yearly	
	Health, Safety & Wellbeing	Click to enter expiry date	Every 3 years	
	Safeguarding Adults	Click to enter expiry date	Every 3 years	
	Safeguarding Children	Click to enter expiry date	Every 3 years	
	Equality & Diversity	Click to enter expiry date	Every 3 years	
	Conflict Resolution	Click to enter expiry date	Every 3 years	
	Preventing Radicalisation	Click to enter expiry date	Annually or Level 1 once only	
	Resus Basic Life Support	Click to enter expiry date		
		Click to enter expiry date		
		Click to enter expiry date		

Has this training been identified in your Personal Development Plan?	Select	Is this Considered Essential/Mandatory training for your specific job role?	Select	*Please select your answer using the drop-down box*
How will this development support you to achieve your Personal Development Plan?	Click here to enter text.			*Please complete the text explaining how this activity will support you to achieve your PDP*

Please indicate how this development will support you to improve patient care and experience	Click here to enter text.	*Please tell us how you will use this learning to improve patient care & experience*
Has this development been included in the team/ward workforce development plan?	Select	*Please select your answer using the drop-down box*
I confirm that the above details are correct to the best of my knowledge. I have read, understood and accept the Study Leave Application Form Information and Terms & Conditions and the date of my PDR was Click here to enter date		*Please ensure you enter the date of your last PDR*

Signature of Applicant: Click here to add digital signature.	Date: Click here to enter a date.	

THIS SECTION TO BE COMPLETED BY LINE MANAGER I agree to release the above member of staff to attend on the specified date(s) **: click here to add Manager Digital Signature.** **Where delegates fail to attend or cancel at short notice their department will be required to pay any fees incurred**	*Your Line Manager MUST check this box before submitting the eSLAF*

IF APPLYING FOR FUNDING SUPPORT PLEASE COMPLETE THE SECTION BELOW
Where a member of staff fails to complete a course or withdraws following commencement, the member of staff will be asked to repay the financial assistance provided.
A Learning Agreement MUST to be submitted with the Study Leave form for courses with a cost of £350 and over:

Allocation	Costs	Funding Source	Cost Centre Code	
Course/Event Fees:	Please enter cost	Select	Click here to enter code	*Please ensure that Cost Centre is inserted where appropriate*
Registration/Exam Fees: Travel/Subsistence Agreed?	Please enter cost Select		Click here to enter code	
NB: Travel & Subsistence MUST be paid from service budgets				
CPD Funding: Is this training application to be considered for CPD funding? Select		**CPD Funding: If this training application is to be considered for CPD funding, why is there a need for CPD funding?** Select		*Please use the drop down box as your answer*

DECLARATION				
Line Manager Authorisation : Job Title: Division:	Click here to enter Name Click here to enter job title Click here to enter Team	Email Address: Phone: Signature: Date:	Click here to enter email address Click here to enter Click here to enter digital signature Click here to enter date	*This section to be completed by the Directorate Authorisation who should then forward to L&D for approval*

Return Completed Form to: wah-tr.CHEC-TrainingTeam @nhs.net
For Office Use Only
Training approved: select **Signature:** Click here to enter digital signature **Date:**
Click here to enter a date. **Comments:** Click here to enter text
Learning & Development Manager

Appendix B Learning Agreement
Learning Agreement

Where the Trust agrees to provide funding for an employee to undertake a programme or course of training **costing £1000** or more, the employee is asked to sign a **Learning Agreement**.

This specifies that should an employee voluntarily leave the Trust within a specified time from completion of part or all of the programme/course, they will be asked to repay a proportion of the costs back to the Trust. This agreement has formal status as part of the employee's contract of employment. This Learning Agreement is between the Worcestershire Acute Hospitals NHS Trust) (the Trust) and the Trust employee.

The employee should read this agreement and ensure they understand the requirement of the agreement. They should then complete the form in full as below and sign where indicated.

Programmes of study are defined as a full academic programme, an individual course module AND/OR programmes of study where a course fee is over £1000
Please note:
   a) *A Learning Agreement is not required for mandatory training or where training has been identified as part of the Trust Capability or Disciplinary Policy.*
   b) *All Trust line Managers must ensure that they enable their staff to have dedicated time to be able to complete their required and identified Continuous Professional Development and linked hours within an annual period in line with staff upskilling, talent & career development*

By signing this Agreement, the employee agrees to the following:

1. An employee's decision to discontinue a course <u>must</u> be discussed with the course leader <u>and</u> their line manager prior to the final decision to ensure that all measures are put in place to support the employee to complete, or to identify <u>exceptional</u> circumstances which would negate the need for repayment of the course fees. The employee will need to notify the Learning & Development Manager of their decision.

2. If, despite these measures and in the absence of exceptional circumstances, the employee still chooses not to complete the course or is excluded from completing the course, the Trust retains the right to request the repayment of a proportion of the fees incurred directly by the Trust.

3. Where the employee <u>completes</u> a course of study for which the Trust is required to pay the course fees but leaves the Trust within 18 months of having completed the course, they will be required to pay a proportion of course costs as follows:

Within 3 months of completing the course	100% to be repaid
Within 6 months of completing the course	75% to be repaid
Within 12 months of completing the course	50% to be repaid
Within 18 months of completing the course	25% to be repaid

4. A standard repayment fee will apply to employees <u>failing to complete a course</u> (other than in exceptional circumstances) which will be 50% of the costs to date.

5. If you defer your course it is your responsibility to notify your manager, Learning & Development and the course provider. If you do not complete after the deferment you may be required to repay costs to date.

6. It is the employee's responsibility to provide the address and the purchase order number (will be provided by Learning & Development) for the invoice to the provider. If the provider does not send an invoice the fees are payable by the employee and reclaimed via EPAY. Trust credit cards are not allowed to pay the fees. The invoice email and address to be used is: sbs.apinvoicing@nhs.net Worcestershire Acute Hospital NHS Trust, RWP Payables 6485, NHS Shared Business Services, PO Box 312, LEEDS, LS11 1HP.

7. It is best practice to share with the team any new learning within the work area.

This Learning Agreement requires the employee to agree to and sign the following declaration:

I understand that in accepting the offer of financial support from the Trust for the course specified below, that in the event of either (a) leaving the Trust before 18 months [as specified above] after completing the course or (b) not completing the course, that I will repay to the Trust the proportion of course fees as specified above.

Copies of this form must be: - held in the employee's personnel file, in the Learning & Development Dept and a copy retained by the employee

THE LINE MANAGER IS RESPONSIBLE FOR INFORMING BOTH FINANCE AND LEARNING & DEVELOPMENT DEPT IF AN EMPLOYEE DOES NOT COMPLETE A COURSE SO REPAYMENT ARRANGEMENTS CAN BE IMPLEMENTED

Employee Name:		Manager's Name:	
Employee work location and Division/Ward			
Employee contact number and Email Address:		**Date of agreement:**	**Training Provider:**
Programme /Course of study:		**Expected commencement date:**	**Expected completion date:**
Cost of module/course:			£
Study leave application form agreed by name and job title:		**Study leave application form attached – YES/NO**	
Is the training considered mandatory/essential training for your specific job role?		**YES/NO**	

AGREEMENT SIGNATURES

Employee signature		**Date:**
Print Name		
Line manager signature		**Date:**
Print Name		

For Learning & Development Dept use

Confirmed date of leaving trust:

Confirmed date of discontinuing the course:

Date employee informed repayment costs will apply:

Amount of repayment: £

Date Finance informed:

Please send completed form to Learning & Development, Charles Hastings Education Centre, Charles Hastings Way, Worcester WR5 1DD,