

TRUST CORE POLICY
STUDY LEAVE AND FUNDING POLICY

APPROVAL	Director of Academic Health Sciences	Date approved:	16/03/12
EFFECTIVE FROM	1 April 2012		
DISTRIBUTION	All Wards and Departments		
RELATED DOCUMENTS	BLT/WX/NUHT policies on appraisal Induction Policy (COR/POL/025/2012-001) Statutory and Mandatory Training Policy (COR/POL/026/2012-001) Risk Management Strategy and Policy (COR/POL/004/2012-001)		
STANDARDS			
OWNER	Director of Academic Health Sciences		
AUTHOR/FURTHER INFORMATION			
SUPERCEDED DOCUMENTS	Study Leave Policy at BLT, NUHT and Whipps Cross		
REVIEW DUE	1 April 2015		
KEYWORDS			

CONSULTATION	<i>Barts Health Working Groups</i>	Education Workstream Management Group
	<i>Barts and the London NHS Trust (BLT)</i>	BLT Policies Working Group
	<i>Newham University Hospitals NHS Trust (NUHT)</i>	<i>Policies Committee</i>
	<i>Whipps Cross University Hospital (WXUH)</i>	<i>Policies Committee</i>
	<i>External Partner(s)</i>	-

APPLICATION	Included in policy:
	This policy applies to all staff employed on a permanent or fixed term contract. It supplements policies that may be in place for specific staff groups (e.g. medical and dental staff) and for departments and professional groups. This policy also takes into account the requirements of professional bodies, on the provision of on-going professional development. All staff directly employed by the Trust may apply for study leave whether they are full-time, part-time, permanent or fixed term. Approval will be given on the basis of appropriateness and relevance to both the individual and the service needs of the Trust.
	Other staff, students and contractors working within the Trust
	Exempted from policy:
	There are no exemptions from this policy

TABLE OF CONTENTS

STUDY LEAVE AND FUNDING POLICY	3
1 INTRODUCTION AND AIMS OF POLICY/GUIDELINE	3
2 PROCESS	3
3 DUTIES AND RESPONSIBILITIES	7
4 MONITORING THE EFFECTIVENESS OF THIS POLICY	8
Appendix 1 Impact assessments	10
Appendix 2 Study leave/fundng application form	
Appendix 3 Funding study leave agreement	

STUDY LEAVE AND FUNDING POLICY

1 INTRODUCTION AND AIMS OF POLICY/GUIDELINE

- 1.0.1 This policy provides information for staff regarding access to education, training and development opportunities (including study leave) at Barts Health, and for line managers who are responsible for reviewing and approving such requests.
- 1.0.2 The Trust will endeavour to meet the expectations and needs of staff where these are consistent with the needs of the service, and are deliverable within the resources available
- 1.0.3 They also ensure that staff gain the vital skills necessary for them to deliver safe and effective services, in the support of users and carers, as well as giving individuals the opportunity to further develop their skills base and level.
- 1.0.4 This policy will support the achievement of these aims through careful prioritisation of training needs, while promoting a fair and equitable application of limited resources

1.1 Definitions

Study Leave	For the purposes of this policy, the term “study leave” is used to cover paid time away from the workplace to undertake relevant training and development, and/or the allocation of funding to cover course or training fees, where applicable.
-------------	---

2 PROCESS

General Principles for the award of Study Leave

- 2.1.1 These following general principles apply to all staff - however, it is acknowledged that some sectors of staff have particular requirements and support provided for study leave – the sectors may vary from time to time depending on the regulatory nature of the profession and central support available. Generally these staff sectors include:

- Senior Medical and Junior Medical Staff,
- Junior Medical Staff in Training,
- Nurses, Midwives and Allied Health Professionals.

Study leave will not be granted to any member of staff who is not compliant with their statutory mandatory training requirements.

- 2.2 General Principles for Managers are as follows:

- What the service can afford in terms of release time
- The link with the applicant’s PDP
- Can the training need be met by other means
- How will the applicant apply their knowledge in their role to demonstrate competence

- Previous funding and development of the applicant
- Cost of funding versus the benefit to the service and department
- Any special circumstances
- Professional requirements
- Requirements for the Ward/Team/Dept to deliver objectives
- Equity of application

2.3 **Planning time off**

2.4 All learning and development activities which require study leave should be identified through the Personal Development Plan process. The requirements of the service take precedence and time off should not be authorised if it will jeopardise service delivery. Paid time off and time off in lieu is to be agreed in advance at the time of application for study leave. Employees with authorised time off will be expected to, wherever and whenever possible, to cover outstanding tasks and duties resulting from their absence. Flexible working patterns may be negotiated when possible to enable the delivery of service and staff may need to consider changing their normal hours of work.

2.5 Study leave should not be considered on an individual basis only but as a collective study leave allocation to a clinical team or a department or area. It should be allocated individually to promote quality and safety of practice whilst supporting the development requirements of the workforce and service delivery. Therefore, the time made available for learning and development should be prioritised to reflect the following:

- Statutory and mandatory training compliance
- Induction - corporate and local induction
- For service delivery, service redesign and essential to completion of professional requirements
- Continuing Professional Development
- General Service
- Personal development

2.6 **Amount of Paid Training and Development Time**

2.6.1 It is anticipated that in general staff require an average of 37.5 hours pro rata of training and development support per annum covering activities such as work based learning, classroom-based and e-learning and including statutory/mandatory training.

2.6.2 Certain professional groups may have additional training requirements that are essential for the role which may necessitate additional paid support. These will be identified on an individual basis during the appraisal process.

2.7 **Eligibility of costs for consideration for support**

2.7.1 In all cases a proportion from 0% – 100% may be awarded and any such award is subject to the agreement of a senior manager.

2.8 Funding

2.8.1 Funding for study leave is not automatic and the degree of financial support to be considered may vary and will depend on service requirements, financial and budgetary constraints - a guide is as follows:

- 100% funding where essential for the service
- 75% funding where there is a major benefit to the service
- 50% funding where there is equal benefit to the member of staff and the service
- 0%-25% funding where the main benefit is to the member of staff but some service advantage
- 0-% Service /line manager willing to provide unpaid study leave only
- Where appropriate the applicant should be directed towards accessing other sources and supplementary sources of funding where possible.

2.9 Examination Leave

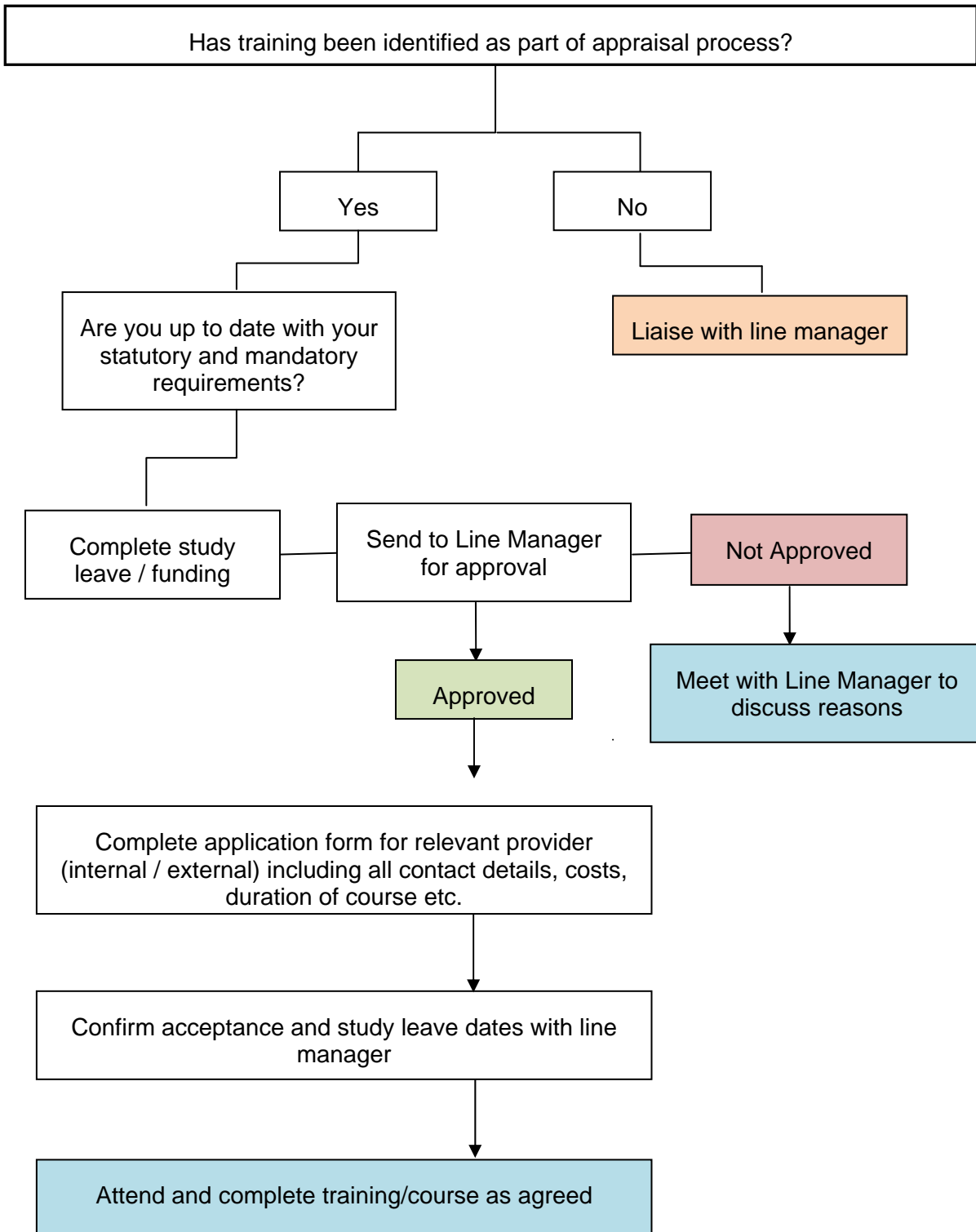
2.9.1 This is to be treated as study leave and included in any original application for leave and funding for a course and event.

2.10 Failure to complete the course/event - unsatisfactory progress - non attendance - Resignation/Dismissal

2.10.1 There is no automatic right to additional study leave support or funding where an applicant has not successfully completed an agreed programme of study.

2.10.2 The Trust reserves the right to seek repayment in full from the applicant who is dismissed or resigns (except in the grounds of redundancy) during the period of the programme. This may not apply if the applicant remains within the NHS in a substantive post or the subject of a TUPE transfer out of the NHS. The schedule of repayment to be set by the Line Manager and finance department.

2.9 Flowchart 1: Application Process for Funding/Study Leave



3 DUTIES AND RESPONSIBILITIES

<p>3.11 All staff working in the Trust</p>	<ul style="list-style-type: none"> • Employees are expected to recognise the need to update their job related knowledge and skills on a regular basis and, to help identify their own learning needs during performance appraisals. • Ensure all statutory and mandatory training is up to date • Apply for study leaver/and or funding using Trust processes. • Staff should not commit themselves to training and development or study leave without written approval from their manager. If written approval has not been obtained, payment of course fees and/or paid time off may not be granted • If funding is declined staff are required to meet with their line manager regarding the reason. Staff can appeal this decision by contacting the Line Managers Manager (i.e. the grandparent role) for review. • Applications for study leave and funding support will not be granted retrospectively. • Employees are responsible for attending and completing all aspects of the learning activity. • Employees have a duty to discuss course progression regularly with their manager. • Employees have a duty to report all non attendance on the day of absence following Trust sickness /absence policy • It is the responsibility of the staff member to book a place on the course once it has been approved by their manager via Learning and Development or course provider. • Non-attendance or cancellation resulting in cost to the organisation is likely to result in costs being charged to the staff member, unless there is reasonable justification or their manager requested cancellation.
<p>3.12 Managers</p>	<ul style="list-style-type: none"> • Developing an overall departmental training and development plan from personal development plans agreed at Appraisal, which guides managers in their response to applications for study leave, and budget setting.

		<ul style="list-style-type: none"> • Ensure staff have an up to date appraisal and PDP. • Ensure staff have completed their statutory and mandatory training prior to undertaking other training. • Ensure approved training has been identified in the individuals PDP and supports the achievement of CAG and organisational goals • Monitor attendance and completion of training • As part of the appraisal process ensure staff demonstrate application of learning in practice • Ensure equal and fair access to training • Provide reports to Education Directorate on a quarterly basis detailing the training undertaken and study leave granted within the CAG Corporate Team.
3.13	Education Directorate	<ul style="list-style-type: none"> • Establish and maintain a central system for processing applications booking places, monitoring, recording and reporting attendances • Provide reports to the Education Board reporting attendance, diversity and costs. • Agree funding for external courses • Liaise with CAGs to ensure equality of training needs analysis (TNA) across the divisions • Liaise with Line Managers to process reimbursement
3.14	Education and Training Committee	<ul style="list-style-type: none"> • Receive study leave and funding reports • Identify and address or escalate issues

4 MONITORING THE EFFECTIVENESS OF THIS POLICY

Issue being monitored	Monitoring method	Responsibility	Frequency	Reviewed by and actions arising followed up by
Applications and uptake of	Reports	Education Directorate	Annual	Education and Training

study leave				Committee
Equality of access to study leave and funding	Reports	Education Directorate	Annual	Education and Training Committee

END

Appendix 1 – Impact assessments

Equalities impact checklist - must be completed for all new policies

Organisational impact checklist - must be completed for all new policies



Organisational
impact assessment

APPENDIX 2: STUDY LEAVE/FUNDING APPLICATION FORM

Application for training, development and study leave- generic form

NAME	
Job title	
Department	
Length of time in current post	
Period of study leave required	From To (incl.)
Is this request to cover statutory and mandatory training (e-learning) to be undertaken away from the workplace?	Yes / No Total Time: (If yes, please indicate total time requested)
Total number of study days requested	
DETAILS OF TRAINING / DEVELOPMENT ACTIVITY	
Title of Course / Conference	
Venue	
Programme details: attach if available, or give summary of programme outline	
JUSTIFICATION	
(i) How will this training / development opportunity benefit you as an employee?	
(ii) How will this training / development opportunity benefit the service and/or the Trust?	
(iii) How does this training / development activity link to your personal development plan (PDP)?	
(iv) How does it support development of the skills and competence required for your role?	
FUNDING REQUESTED	
Course / conference fees	£ : p
Examination fees	£ : p
TOTAL	£ : p

Declaration: I have read and understand my individual responsibilities and them procedure for study leave application

SIGNATURE OF APPLICANT	DATE
SIGNATURE OF MANAGER	DATE

This form should be completed by the applicant, submitted to the line manager, and retained in the employee's local personnel file.

APPENDIX 3: FUNDING STUDY LEAVE AGREEMENT

(to be completed for all (non-Contract) applications)

I, the undersigned, agree to receive the Award of £...../a funded University place [delete as appropriate] from Barts and East London Healthcare.

I am accepting this Award on the understanding that, if I leave the employment of the Trust during the course of study for which the Award was granted, that funding will immediately cease and I will be expected to find alternative funding from the date of my employment with the Trust ends.

I will inform the TBC in writing should I leave during a period of study or decide not to complete a course of study. I understand that failure to do this may result in disciplinary action.

I understand that should I not complete a course of study funded by the Trust I will not be able to undertake further study (other than essential) for a period of 12 months.

I agree to effectively share the knowledge I gained on the course with my colleagues.

I understand that failure to attend a study day or submit assessments will result in me being required to repay the Trust any costs incurred.

For MSc or PhD programmes I agree to:

Discuss my research proposal with my CAU Research Lead and identify the link to patient care within the division.

Publish at least one paper and present at a minimum of one external conference on my research

Course:

Signature:

Full Name:

Designation: Ward/Dept:

Site:

Home Address:

.....

..... Post Code:

Home/Mobile Telephone Number: