

# Learning at Work Policy

For Agenda for Change staff

Ref: HR23/001





**Version**

<b>Title:</b>	<b>Learning at work policy</b>		
<b>Author(s):</b>	<b>Organisation and Workforce Development Head of Service</b>		
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<b>Version No.</b>	1.0	<b>Supercedes:</b>	POST ENTRY LEARNING, DEVELOPMENT AND EDUCATION GUIDELINES
<b>Links to other policies</b>			



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## 1.0 Introduction

The Western Health and Social Care Trust (WHSCT, or 'The Trust') is committed to becoming a learning organization and embracing the principles of lifelong learning, enabling a culture that values and expects that all staff will have the opportunity to learn and develop continuously throughout their working life.

As part of this process each member of staff should have the opportunity to have an annual appraisal review meeting with their Line Manager, part of which is dedicated to identifying and agreeing an Individual Learning Plan (ILP). Once the ILP has been identified the individual should take the appropriate steps to avail of development opportunities.

The Trust is dedicated to providing a blended learning experience for all staff wishing to avail of an ILP. Education, Learning & Development or Training can take place by way of short courses or by longer programs of study, the expenses of which may be met by the Trust, either in part, or in full, or the employee themselves as agreed in advance.

Appropriate approval should be obtained alongside the ILP at the managerial level required before application to enroll is made. This can vary by course and learning opportunity and will be clearly outlined in any communication regarding the process of enrolment

*There are 2 different categories of Individual Learning:-*

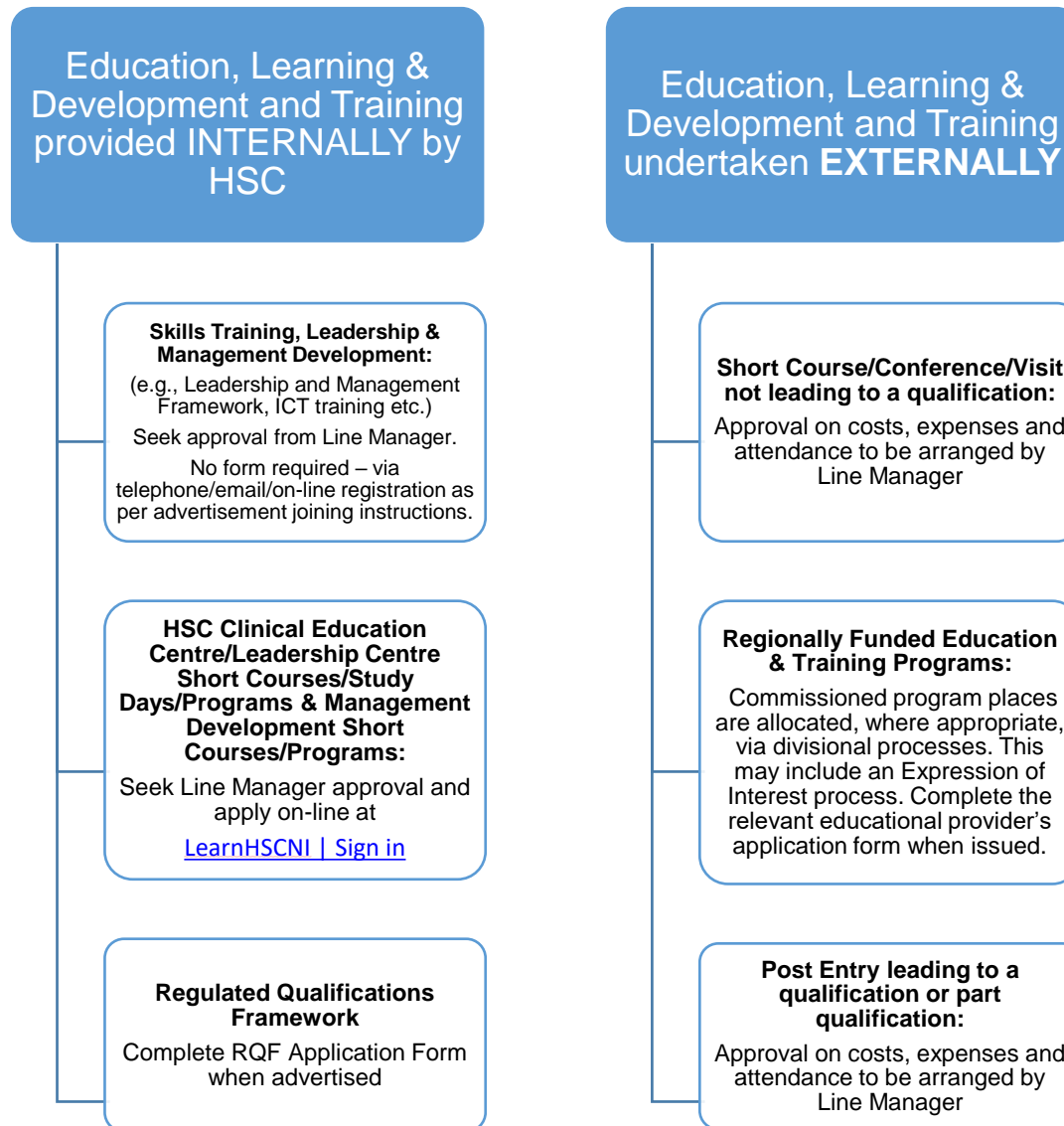
Education, Learning & Development and Training provided internally by HSC

Education, Learning & Development and Training undertaken externally

This policy will outline the process of how to apply for each type of training. Study Leave will be agreed by discussion between the employee and the manager after consideration of service needs and individual training requirements. Travel and subsistence entitlement is provided and requirements regarding cancellation or withdrawal of a place by the employee.

## 2.0 Course Types and Application Process

**Types of Learning**





## **Application Process for Education, Learning & Development and Training provided internally by HSC**

Internal training is defined as Corporate Mandatory (e.g. Fire Training); Skills Training, Organization and workforce development (e.g. coaching, leader and manager framework); HSC Leadership Centre: Clinical Education Centre/Leadership Centre (e.g. short courses/programs, study days or consultancy days); Regulated Qualification Framework awards (RQF's) and Social Services Workforce Development & Training Unit courses.

### **Corporate Mandatory Training and Skills Training & Management Development**

The Trust operate a partial booking system for all the courses delivered by Trust staff (including courses advertised by the Organizational and Workforce Development team). Courses are advertised via e-mail globally to all Line Managers and published on the Trusts SharePoint site. In-house training providers should advertise courses at least 8 weeks in advance where possible to allow Line Managers sufficient time to arrange cover and/or manage Rota's. Once approval from Line Manager has been gained, staff should ring or e-mail the appropriate department as indicated on the course advertisement to book their place. In the case of e-Learning modules, or other trainings that use the Learning Management System (LMS) staff should self-register as per joining instructions on the course advertisement. E-learning modules for HSC staff can be found on the Learn HSCNI site available on the following link: [LearnHSCNI | Sign in](#)

Any employee with a disability who requires special arrangements to be made in advance of attending the course, e.g. need for an interpreter or parking facilities etc, should get in contact with the relevant training provider at the earliest possible opportunity in advance of the training to ensure their request for reasonable adjustments can be considered/actioned.



## HSC Leadership Centre (Clinical Education Centre & Leadership Centre)

The Trust has Service Level Agreements (SLA's) with the HSC Clinical Education Centre and HSC Leadership Centre for Professional Nursing & Midwifery/AHP training, Leadership & Management Development and Skills Training. It is important that the Trust effectively monitors the use of these SLA's to ensure as many staff as possible can benefit from appropriate development opportunities.

The SLA's can be used in the following 3 different ways:-

Consultancy Days can be requested directly from the HSC Leadership Centre from the following link. [Consultant Request \(office.com\)](#) . Please note that arrangements for consultancy with the HSC Leadership Centre must be handled directly by the requestor. In addition, the following Trust document must be referred to when arranging Consultancy in cases where data sharing may be necessary. This document can be used to review the nature of the Consultancy request and to put in place a Confidentiality Agreement where necessary depending on the nature of the work. [DAA - Data Access Agreement template v5.0 \(Sept 2022\).docx \(n-i.nhs.uk\)](#)

- Open Short Course/Study Day places/programs - book on-line at [Sign in \(hscni.net\)](#); or if at the Leadership Centre, Hampton Manor Drive, Belfast – seeking approval from your Line Manager before progressing any formal bookings to ensure the funding is in place for attendance to the course.
- Management Development places (at HSC Leadership Centre, Hampton Manor Drive, Belfast) – seek approval from your Line Manager, then book on-line at [Sign in \(hscni.net\)](#)

## **Regulated Qualification Framework (RQF) Awards**

The Organization and Workforce Development team continues to aspire to facilitating RQF's for those HSC staff who are involved in the delivery of care. Over recent years RQFs have provided opportunity for staff to develop and learn new skills within their current job roles. In more recent times career progression has become a reality. Many staff having completed RQFs have moved to new jobs and continuing to develop and learn new skills.

The Organizational and Workforce Development team will advertise all qualifications offered via e-mail and other online channels to all Line Managers

All applicants should request and complete the appropriate RQF application form from the Organizational and Workforce Development team and seek approval from their Line Manager who will then discuss with the appropriate Head of Service. Once approval from the appropriate Head of Service has been gained the application form should be forwarded to the Organizational and Workforce Development Team who will confirm places directly with the individual. A waiting list may be created if individual programs are oversubscribed.

Line Managers will be notified via e-mail of any non-attendance.

In the event of a candidate missing one or more of the training sessions, the candidate may be required to be put on hold until the provider is able to facilitate the training at a later stage. It should be noted that the alternative training location could be in any Trust area and/or via remote delivery (e.g. Zoom). Employees are expected to organize the best option for themselves in order to attend the missed session(s)

**External courses are defined as any learning that is provided from an external source and not part of the internal HSC workforce. These include:**

- Courses/Conferences/Seminars/Visits (that do not lead to a qualification).
- Regionally Funded Nursing & Midwifery and AHP Education & Training Programs defined as Professional Post Registration Education, Learning & Development and Training e.g. Post Registration Education Commissioned courses or Nursing & Midwifery Education and Training Programs.
- Regionally Funded Social Services Training Programs defined as Professional Post Qualification Training e.g. Post Qualifying, Social Work Accredited Programs/Modules, etc.
- Post Entry training (leading to a qualification or part qualification) defined as delivered by an academic institution/education provider eg University, Regional College, etc. that requires students to undertake assessment ie assignments and/or examinations. Please note some Life Support Programs will lead to an academic qualification.

### **Application Process for Education, Learning & Development and Training Undertaken “Externally”**

1. Line manager approval must be provided for all external courses, whether or not a course fee is involved, as in the case of regionally funded courses, the Trust must ensure appropriate funds are re-distributed and/or so that expenses may be claimed.
2. Where funding for attendance at courses/conferences is from the Trust Charitable Funds, staff must also complete a Request for Approval for Expenditure from Charitable Funds form.
3. It is up to the staff member to provisionally book a place on the course, with the approval of the Line Manager/Finance Approver and/or Assistant Director. In the case where the amount of expenditure requested exceeds the approval limits for an Assistant Director, it will be necessary for the relevant Director to consider and approve.
4. The application form, along with supporting documentation, must be forwarded to the relevant Head of Service in advance of the course taking place. The Head of



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Service will subsequently aim to forward the appropriate documentation to the Assistant Director/Director for approval, and if approved relay this decision back to the staff member to allow them sufficient time to secure their place on the course and make appropriate travel arrangements (if necessary). Applicants should retain a copy of the course information.



### 3.0 Claiming for Expenses

In situations where the Line Manager approves fees and travel expenses for non-accredited external courses deemed to be relevant to the employee, course fees will be reimbursed by the Trust, and travel expenses should be claimed at the appropriate rate. In all cases specific details on what can be claimed can be found on the NHS Agenda for Change Terms and Conditions of Service Handbook Annex 12 on the following link [Agenda for change | NHS Employers](#)

The standard rate of reimbursement for post-entry course fees and examination fees is 75% for those courses that are non-commissioned i.e. the member of staff must make a personal contribution of 25% of the cost of participating in the course. Receipts must be retained as proof of payment and submitted to the approving manager with the claim for reimbursement.

If the course is deemed as mandatory for the staff member, for example certain commissioned courses within Nursing and Midwifery that are required to maintain professional skills and licenses, then the Trust will look to cover the post-entry and examination fees at 100% reimbursement so that there is no cost to staff. Approval should be sought first from the direct line manager and receipts must be retained as proof of payment and submitted to the approving manager with the claim for reimbursement.

Expenses will be reimbursed by completing a claim form on HRPTS ESS – Guidance is available via the ‘Help and support’ section in HRPTS or by accessing the [HR Knowledge Hub](#). NB: Line Managers must keep receipts for a period of 3 years in line with the Trust’s Retention & Disposal Procedure.

#### Payment of course fees

Where the Trust is funding 100% of course fees the invoice should be emailed directly to Payment Shared Services stating the name of the approver and the cost centre to deduct the payment from. Finance will scan this invoice and route it out in FPM to the appropriate FPM approver for their authorization and then payment.

Where invoices in respect of fees are met by the individual, the relevant percentage of the course fees will be reimbursed via making a claim on HRPTS or following the Endowment & Gifts procedure where the course funding is from Endowments and Gifts.

In cases where staff are unable to pay the full course fee up front before claiming back the 75% that the Trust is responsible for then other options can be explored

which include, but are not limited to:

- Flexible payment options with the Education Provider. For example some education providers allow the course fee payment to be spread over monthly installments, or are able to split the invoice into 2 parts so that the individual staff member only receives an invoice for 25% of the overall fee and the remaining 75% can be sent directly to Payment Shared Services stating the name of the approver and the cost centre to deduct the payment from. In any occasion where these arrangements are agreed to it is the staff members responsibility to a) organize the details with the provider and b) ensure any payments either monthly or otherwise that need to go directly to the provider are successful and on time.
- Available funding options through any Government programs that will partially or fully cover the fees
- Any available funding that may be available through the Trust's Endowments and Gifts Committee.
- Any other grants or bursaries available that will reduce the overall upfront costs to the individual staff member

Managers who need advice on how to support the staff member throughout any of these processes can contact the OWD team directly at [owd@westerntrust.hscni.net](mailto:owd@westerntrust.hscni.net)

The Trust will fund the purchase of course materials at 100% (up to a maximum of £40 per academic year) providing the following conditions are met:-

Any textbooks claimed for must be 'essential reading' for the course of study.  
Receipts being provided as part of the expense claim

There is an expectation on the part of the student that they have exhausted all other avenues to borrow the book(s) in advance of making a purchase with the intention of submitting a claim, e.g. the relevant educational institution's library, public libraries, including the Trust's Resource Library at the Medical Education Centre and the Organizational Development team to ensure that the textbook cannot be borrowed. The textbooks must be returned to the Trust's Resource Library or Organizational Development team on completion of study.

Receipts should be sought as backup for all expenditure and claimed via HRPTS such as:-

- Meals.



- Bus/train/taxi fares (Taxi fares will only be reimbursed if no other form of transport is available).
- Course and/or examination fees.
- Car parking.
- Course reading materials/books

Guidance on how to use HRPTS for submitting expense claims can be found on the Trust intranet page.

These are broad guidance notes and staff should make themselves aware of the subsistence allowances prior to committal. These can be found here. [Agenda for change | NHS Employers](#)

Any queries regarding financial assistance should be brought to the attention of the relevant Director/Assistant Director.

Failure to adhere to the above procedures will result in claims being delayed or not being reimbursed.



#### 4.0 Study Leave Entitlement

Should a course that is required to meet the needs of the service run during periods of time outside of the normal working week, appropriate time off in lieu (TOIL) will be granted to cover attendance requirements of the course/training. This includes any core mandatory training that cannot be completed during normal working hours for a valid reason (eg. Service pressures). If TOIL cannot be accommodated in a particular case, payment for time owed may be approved, subject to discussion/approval by the appropriate Assistant Director, based on the needs of the service.

There may be protected time out for approved mandatory training via e-learning and courses/learning relating to the individual's agreed development plan via the appraisal process. Click [Mandatory Training](#) to refer to the Trust's e-Learning Policy to access a list of current agreed times for Corporate Mandatory Training e-Learning.

- Staff who are allocated to work, for example, a 12 hours shift will be expected to return to base following their attendance at a course.
- If the course is in the afternoon and staff are required to work a morning shift they will be facilitated with time to change out of uniform as per the Trust's uniform policy.
- Employees will be granted time, during normal working hours, to travel to and from the course/program.
- Any additional study/completion of work in connection with the course will be completed in the member of staff's own time.
- Time off to complete assignments will not be granted as study leave.
- Employees will be granted time off for the duration of an examination, if applicable, whether or not time is in normal working hours.
- In addition, employees will be granted one days study leave pro rata for each examination up to a maximum of three days pro rata per academic year.



Generally, employees re-sitting examinations will be expected to do so in their own time. However, applications for leave/expenses to re-sit examinations will be considered in exceptional circumstances.

In relation to Regionally Commissioned Courses, Nursing Staff will also be given:-

- 2 hours 'time out' to register for courses prior to commencement.
- Time to attend lectures/tutorials must be agreed with their Line Manager.

In courses where there are practice-based elements incorporated, any additional time required outside the individual's contracted hours should be negotiated with their Line Manager.

NB: no study leave will be allocated over the university holiday periods for stand-alone modules.

## 5.0 Cancellation

1. If, for any reason, an applicant is unable to fulfil the full requirements of the training course, they should ensure the course organizer and their Line Manager is given as much notice as possible so that if financial support is involved the relevant parties can be informed in order to avoid paying cancellation fees.
2. Where financial assistance has been granted and the employee discontinues his/her studies or fails for some unacceptable reason to sit his/her examination, they will be required to refund the Trust the total amount of assistance granted. The employee will not be reimbursed by the Trust for the cost of the course. In this instance managers should contact the Retained Finance team to arrange for an invoice to be raised to the staff member involved.
3. Where financial assistance has been granted (including fully funded regionally commissioned courses) and the individual is struggling to complete the course for any reason, it is important to raise this with the direct Line Manager as early as possible to allow time to explore all available options which may include, but not limited to, deferment or study break. The Trust understands that circumstances can change at times and it is important to have open and honest two way communication in order to resolve challenges up front where possible.
4. Where financial assistance is granted for courses leading to a qualification it will be on an annual basis. Payment for a second year will be conditional upon the successful completion of the first year and to this end students must submit evidence of successful completion of examinations at the end of each academic year.

5. In certain circumstances, for training and development that requires significant investment by the Trust and the role is deemed as a specialist or 'hard to fill' post, a learning agreement with a retention clause can be used by the service manager upon approval by Assistant Director level or above. The details of such a clause will be defined on a case by case basis, and the agreement must be signed by the staff member **before** undertaking of any study.

## 6.0 Consultation and engagement

Stakeholders were consulted through the governance structures in place in the following groups within the Trust's governance structure. At each stage the policy was reviewed, feedback was provided, changes were made and approval to move to the next stage was provided. Outside of these formal governance structures input was provided by the Interim Head of AHP Services and a Senior Accountant in Financial Management on claiming for travel and other expenses.

HR Policy Design Group: Reviewed and approved 20<sup>th</sup> September 2023. This group is attended by a range of HR professionals and Trade Union (TU) representation.

HR Senior Management Team meeting: Reviewed and approved 4<sup>th</sup> October 2023. Attended by the Director and Assistant Directors (AD's) of HR.

Trade union consultation: Reviewed and approved 24<sup>th</sup> October 2023. Attended by and AD of HR and TU representation by Trevor Lucy (Unison), John Havord (Unison), Richard Dalzell (Unison), Jill Weir (Unison), Alan Philson (Unison), Tony McLaughlin (Nipsa)

Policy group: Reviewed and approved 14<sup>th</sup> May 2024. Attended by representatives from all Trust services.



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