Yorkshire Ambulance Service NHS Trust

Support for Learning and Development Policy

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1.2	September 2019	Wendy Kelvin	A	Review of Learning and Development policy underway. Extension agreed at Sep TMG until Jan 19
1.3	February 2019	Wendy Kelvin	A	TMG approved 1 year extension of policy to allow for development of the future career framework.
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Associated Documentation: Insert names of associated Policies or Procedures here • Learning and Development Approvals Panel SOP • YAS One Team Best Care and People Strategies				

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Staff Summary

The policy aims to ensure that each individual member of staff in the Trust has access to learning and development opportunities through a common and consistent approach.

1.0 Introduction

1.1 The purpose of this policy is to provide guidance for the authorisation of learning and development that requires organisational approval, financial support, abstraction from normal working duties and Continuing Professional Development (CPD) requests. Application of this policy will ensure that a common and consistent approach is taken to the careful consideration of applications for learning and development by individuals who wish to pursue relevant opportunities.

1.2 The Trust is committed to supporting the learning and on-going personal and professional development of all staff and creating a learning culture. Key priorities of the Trust's One Team Best Care and People Strategies are to attract, develop and retain a highly skilled, engaged and diverse workforce and grow and develop our existing workforce to become an exemplary workforce for the future.

1.3 To achieve this ambition, we need to ensure that staff receive not only the training they need for their roles but to enable them to grow and develop for the future.

1.4 Outputs from annual personal development reviews (PDR) capture details of objectives set and any development activity required through the next 12 months are is linked to this policy. Whilst not all applications need to be supported by PDR objectives they should be considered in the decision making process by the Learning and Development Approval Panel (L&DAP) formerly known as Course Approvals Panel (CAP).

2.0 Purpose/Scope

2.1 This Support for Learning and Development policy applies to the personal, professional and academic development of all employees within the Trust that is considered not core training essential for role. There is no requirement to complete learning and development applications for the L&D panel for mandatory training or clinical refreshers or core training essential to role. This policy and process is for applications for learning and development where Trust approval is required. This is required where access to public funding, levy or where abstraction is required. Once completed, the learning and development will not, on its own, lead to a change in the scope of practice of the applicant.

2.2 Panel outputs are recorded by the academy resource coordination team for audit and analysis purposes.

2.3 In order to be eligible for learning and development support, the following conditions must be satisfied:

2.4 The applicant must be employed by the Trust under Agenda for Change terms and conditions or an apprenticeship contract. There are some exceptions such as staff employed on a fixed term contract of less than 6 months.

2.5 The applicant should have a relevant PDR recorded

2.6 The applicant is currently compliant with regard to all statutory and mandatory training required for their role. Exceptions may be where it has not been possible to attend due to extenuating circumstances.

2.7 The learning or development is relevant to role, aspirational, CPD and should be consistent with the applicant's PDR plan or following a professional discussion with a relevant manager or professional.

2.8 There is a clear benefit to the Trust or individual in supporting the applicant's participation on the learning or development opportunity.

2.9 Where funding is requested the applicant is not already enrolled on a funded course, learning or development opportunity which is yet to complete.

2.10 Learning and development support may not be granted, even if eligibility criteria are met, when the applicant has previously withdrawn or failed to complete a funded course, programme or development opportunity. This will be considered on an individual basis and in consultation with the applicant's manager. The panel need not know the details of the previous withdrawal but only needs to know if the manager supports the new application.

3.0 Process

3.1 Application Process

3.1.1 The application process for support for learning and development is via the YAS learning and development portal. The process is summarised in Appendix 1 and can be accessed via this link http://learning.yas.nhs.uk/

3.1.2 In circumstances where an individual employee wishes to apply for a learning or development opportunity and their annual PDR is not yet due, or this has not been recorded in their PDR, the individual employee should have held a professional discussion relating to the specific learning which concludes there is a benefit to the Trust or individual in undertaking the opportunity.

3.1.3 When a relevant learning or development opportunity is identified, an online application should be completed through the Intranet Learning Portal. Should the applicant not have access to the Intranet, a paper based alternative application will be made available from the Administration team at YAS Academy, Elm Bank, Stanley Road, Wakefield, WF1 4LH

3.2 Consideration of support for learning and development

3.2.1 Applications for learning and development support that are submitted through the portal will be considered on a case-by-case basis by the L&DAP. Applications from employees will only be presented to the panel if approved by the employee's line manager.

3.2.2 The Approvals Panel will meet on a monthly basis chaired by the Deputy Head of YAS Academy or a deputy. Quorum is the Chair or Deputy Chair and at least four panel members, including Operations, Staff side, Clinical Directorate, Academy and Leadership & OD representation that will each represent a PGB. Where no PGB representative is available, decisions will be withheld.

3.2.3 The Approvals Panel will allocate support for learning and development based on the following considerations:

- The cost of the learning or development opportunity and its consistency with the general marketplace.
- Support from local management teams.
- Availability of funding from the L&DAP budget, apprenticeship or other levy, supporting departmental manager budgets, HEE or other national funding streams and individual CPD budget.

3.2.4 The L&DAP has no responsibility for approving abstraction, paid or unpaid, nor any influence over scheduling team activity.

3.3 Approved Financial Support

3.3.1 This may include but is not limited to:

- Course fees.
- Registration/student membership subscriptions.
- Examination costs
- Book/Materials
- Other Expenses

3.3.2 Claimable expenses incurred for attendance on the course, development opportunity or programme in question will only be paid in line with the Trust's Travel and Subsistence Policy.

3.3.3 The payment of expense claims will be subject to submission of receipts or other proof of payment as defined in the Travel and Subsistence Policy.

3.4 Abstraction

3.4.1 The approval panel is unable to grant abstractions or leave to study. It is expected that the applicant's line manager has already discussed and agreed with the employee the issue of absence from work or operational duties for the purposes of study leave. Managers should be aware that if they approve an application that requires abstraction, the panel will consider that the abstraction is also approved unless specifically stated by the manager that the applicant must attend in their own time.

3.5 Terms of Approval

3.5.1 When the application is approved, this will be communicated back to the individual applicant and confirmed in writing within seven working days by the coordinator of the L&DAP. The applicant will be sent a 'Reimbursement Agreement Form' should the value of the course exceed £1000.

3.5.2 The 'Reimbursement Agreement Form' needs to be completed and signed by the applicant, prior to enrolment on the learning or development opportunity.

3.5.3 Should the application be rejected, the reason for rejection will be communicated back to the individual applicant and confirmed in writing within seven working days of the panel meeting by the coordinator of the L&DAP.

3.6 **Appeals Process**

3.6.1 Unsuccessful applicants will be provided with a clear reason why their application has been declined. If the reasons are not acceptable to the applicant, an appeal against the decision of the Approval panel may be made in writing to the Chair of the L&DAP. The appeal must include the grounds for which the appeal has been made. Where the appeal cannot be resolved the case will be elevated to the Associate Director of education and organisational development for independent review. Applicants are encouraged to consult staff side representation as part of their appeal.

3.6.2 A response should be given to the applicant within 14 days

3.7 **Reimbursement Agreement**

3.7.1 In circumstances where the Trust or public funds are used costing more than £1000 the Trust will seek a commitment from that individual to remain with the Trust for a specified period following successful completion of the learning or development opportunity.

3.7.2 By signing and returning the Reimbursement Agreement form (Appendix 2), the individual staff member understands that the funding allocated by the Trust or public fund is subject to the continued employment of the staff member for a specified period after successful completion of the learning or development opportunity.

3.7.3 Under certain circumstances detailed in section 8 below, if an individual staff member fails to remain in the employment of the Trust for the duration of the specified period, they may be liable to repay some or all of the funds which were made available to them. Details of the repayment schedule can be found in Appendix 3.

3.7.4 Refusal on the part of an individual staff member to sign the Reimbursement Agreement form will result in the withdrawal of the offer of funding and/or support.

4.0 Liability to Repay Funding

4.1 Applicants will be required to repay funding under the following circumstances:

- During the specified period and in circumstances where; the individual staff member voluntarily resigns from employment with the Trust.
- The individual staff member makes their continued employment with the Trust untenable and/or is dismissed from the Trust.

4.2 An individual staff member who chooses to take voluntary early retirement at any time during the specified period will be liable to repay all or some of any funding provided, in accordance with the sliding scale shown in Appendix 3. A decision to take early retirement by an individual staff member will, for the purpose of this policy, be taken as constituting voluntary resignation from the Trust, unless that individual returns to the Trust as a part-time employee within 3 months of taking voluntary retirement.

4.3 Individual staff members will not be liable for any repayment of funds, during the specified period and in circumstances where:

- The individual staff member is made redundant by the Trust or their services are otherwise dispended with, through no direct fault of the individual.
- The individual staff member is entitled to a period of maternity or paternity leave, in accordance with current UK employment law and the Trust's conditions of service.

- The individual staff member is on long term sick leave.
- The individual staff member is successful in applying for another role within the Trust or another department within the Trust, but still remains within the paid employment of the Trust.
- The individual staff member successfully applies for a change in contracted hours of work. For example, an individual who was previously employed on a full-time basis reverts to part-time working, and vice-versa.
- The individual staff member is retired by the service due to sickness, disability or injury which could not be foreseen when funding was approved.

4.4 Should an individual staff member successfully apply for and take an unpaid employment break from employment with the Trust during the specified period, then any time remaining will effectively be frozen. Upon returning to employment with the Trust, the specified period remaining will still apply, and the clock will restart.

4.5 Should an individual staff member choose to resign from the Trust during the remainder of their specified period, or should that individual choose to resign whilst on their employment break and not return to work with the Trust then that individual will be liable to repay some or all of the funding for their course, programme or development opportunity, in accordance with the sliding scale shown in Appendix 3.

4.6 Any liability to repay funding provided during the specified period may be reviewed and possibly wavered in the light of exceptional personal circumstances.

4.7 It is not possible to provide specific and exhaustive examples of what may constitute ‘exceptional personal circumstances’ and each case would have to be reviewed on its own merits. However, such circumstances may include severe or devastating personal circumstances that could not have reasonably been foreseen by the individual staff member in question at the time that they applied for funding from the Trust.

5.0 Non-Attendance on Courses and Development Opportunities

5.1 The Trust will approve support for learning and development to individual staff members on the understanding that those individuals will make every effort to attend the learning and opportunity or programme that is being supported.

5.2 It is the responsibility of the individual staff member to report any unauthorised absence from their learning or development opportunity to their manager in addition to the standard sickness notification procedure.

5.3 If a staff member fails to attend a learning or development opportunity it is the responsibility of their line manager to inform the panel of their continued or discontinued support. No further details are required by the panel regarding the reason.

5.4 In cases where support or manager approved abstraction has been granted and an individual fails to attend without extenuating circumstances, any additional travel or subsistence that was approved with the application will cease.

5.5 Should an individual staff member fail a learning or development opportunity due to non-attendance, the individual will be liable for the repayment of all funds made available to them under this policy.

6.0 Withdrawal or Deferral from Learning or Development Opportunities

6.1 Should an individual staff member wish to withdraw from or defer completion of a learning or development opportunity, the individual must follow the training or programme provider's guidance and protocols. In addition, the individual staff member should make all appropriate arrangements to minimise the financial commitment to the programme.

6.2 The Trust will not be responsible for expenses and financial losses incurred as a result of individual staff members not following the training programme provider's guidance and protocols on withdrawal or deferment.

6.3 It is the responsibility of individual staff members to notify their line manager and the L&DAP chair of any decision to withdraw from or defer completion of their learning or development opportunity an soon as that decision has been made, in order to minimise further financial loss to the Trust and further unnecessary absences from work commitments or operational duties.

7.0 Implementation Plan

7.1 The latest approved version of this document will be posted on the Trust Intranet site for all members of staff to view. New members of staff will be signposted to how to find and access this guidance during Trust Induction.

7.2 Links to the procedural documentation that supports this policy will be circulated to all line managers and held on the Trust Intranet.

8.0 References

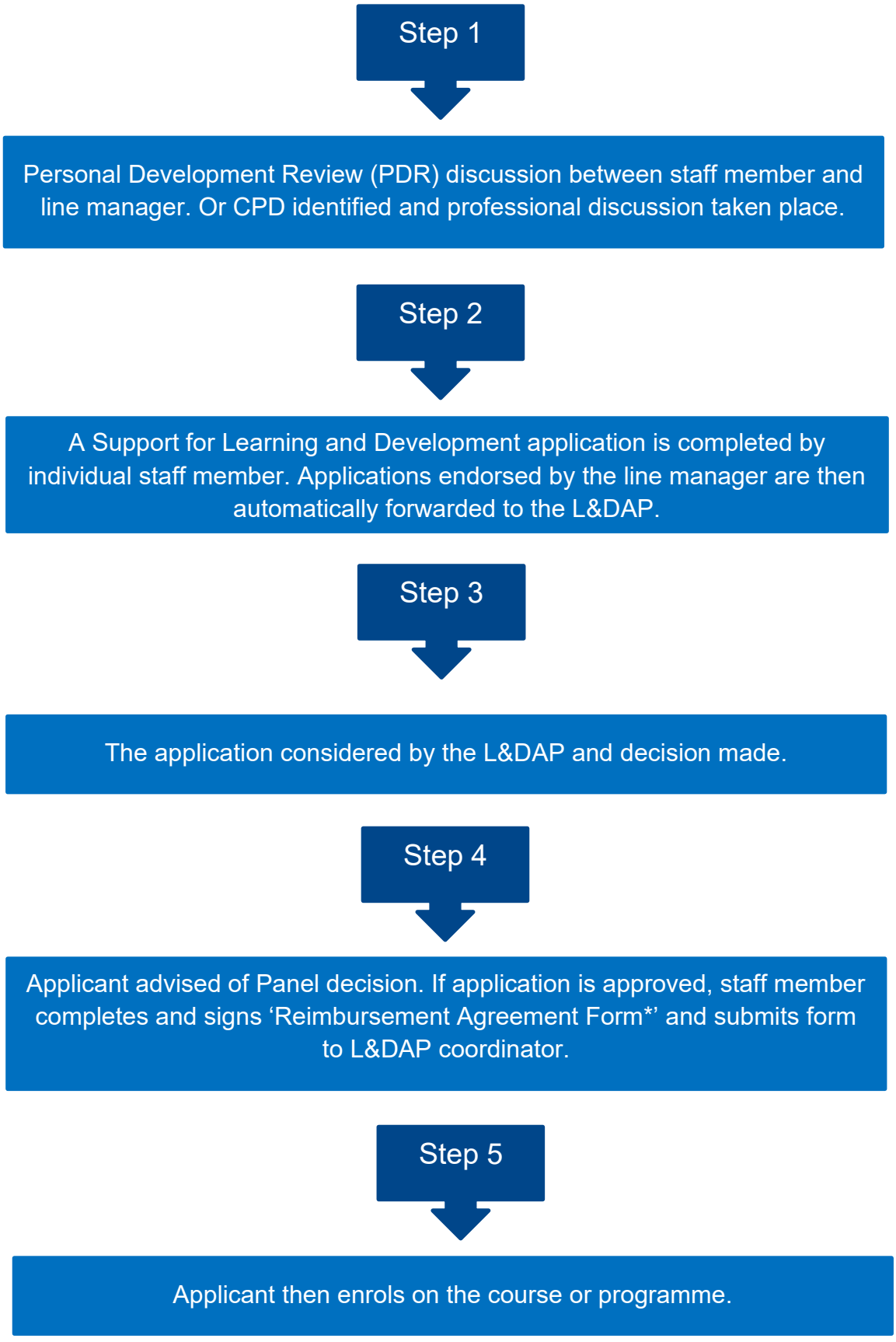
8.1 Agenda for Change

9.0 Appendices

9.1 This document includes the following appendices:

Appendix 1 – Application Process for Learning and Development
Appendix 2 – Reimbursement Agreement Form
Appendix 3 – Scale of Funding Repayments

Appendix 1 – Application Process for Learning and Development



Appendix 2

Learning and Development Reimbursement Agreement Form

This form should be returned by the applicant to the Learning and Development Panel coordinator as soon as practicable, and in any case within 14 days of any written request to complete this form.

Name of applicant……

Learning/Course Title……

Start Date……

Completion Date……

I ……..undertake that if I leave the employment of Yorkshire Ambulance Service within the specified period of completion the above course of study/development programme, I will repay funds provided to me by Yorkshire Ambulance Service or other public fund in accordance with the scale detailed within the Support for Learning and Development Policy.

In the event that I become liable to repay funds to the Trust, I understand that I can either negotiate a repayment plan and/or have monies deducted from my final salary payment. By signing this form I am consenting for monies owed to be taken at source from my salary payments and or my final salary payment.

Applicant's signature……...

Applicant's name (please print)……

Date……...

Appendix 3 – Scale of Funding Repayments

The following scale of payments is to be repaid by individual staff members who leave the employment of the Trust within the 'specified period' shown, for all funding approvals of £1,000 (excluding VAT) or more.

Total amount of funding approved by the Trust (excluding VAT)	Duration of specified period (period of liability to repay funds to the Trust)	Percentage of total funding to be repaid to the Trust
Up to £1,000	NONE	NONE
Over £1,000	Leaving within 6 months	75%
	Leaving within 1 year	50%
	Leaving within 18 months	25%
		No liability in months 24+

Should an individual staff member leave the employment of the Trust during or before the completion of a course or programme for which they have received funding, the individual concerned will be required to repay to the Trust 100% of the funds provided to them.