

The Newcastle Upon Tyne Hospitals NHS Foundation Trust

Human Resources Policies and Procedures

Study Leave/Continuing Professional Development (CPD) Policy

Effective from: November 2011

Review date: October 2014

1. Introduction

The Trust is committed to supporting the development of staff as a primary means of enhancing the quality of service provision. The Trust therefore encourages attendance at training and associated learning/educational events which are relevant to individual employees' present and potential responsibilities, and which contribute to the effective working of the organisation. This policy incorporates the statutory right to make a request in relation to study or training.

2. Scope

This policy applies to all Trust employed staff groups, regardless of grade, profession, type of contract or working hours and covers approval for leave for education and training purposes, and requests for financial support associated with the learning activity. Responsibility for agency and locum staff training lies with the relevant agency, not the Trust. The responsibility for managing and recording study leave of junior medical staff in approved training posts (Foundation, ST1-2 and ST3-7 and those in LAT posts) is the responsibility of the deanery and is managed in the trust via the education centre. All other medical staff in non-training grade and career grade roles are subject to this policy.

Leave required by employees for mandatory training purposes is exempt from this policy, employees must be permitted to undertake their mandatory training in order to effectively fulfil their job role.

3. Study Leave Definition

The term study leave covers those periods of time when a member of staff is absent from their normal workplace to attend a course, conference, seminar, workshop for the purpose of developing knowledge, skills or attitudes which will help them at work, or with their agreed development e.g. clinical skills development, technical knowledge and skills update, professional conferences, workshops. Approved absence from work for study leave will normally be paid at flat rate; however individuals should not be financially disadvantaged through undertaking compulsory training. Extraordinary circumstances must be discussed with the applicant's manager and referred *and agreed at the time of application/approval* to an application.

Attendance at events/activities that do not meet this definition are to be agreed with line manager

For medical and dental staff allowances for paid study leave also includes professional leave which can be defined as usually but not exclusively or necessarily, attendance on a course or programme, research, teaching, examining or taking examinations, visiting clinics and attending professional conferences, training.

Attendance at external meetings required as part of individuals' job requirements or to represent the Trust, is considered authorized paid absence and thus recorded as such.

Agreed official duty/authorized absence claims and their associated costs will be managed and funded by the individual's department.

As outlined in the Professional Registration Policy, all employees are responsible for maintaining their professional registration and compliance with its requirements. The job planning arrangements for senior medical and dental staff accommodate CPD. For all non medical staff, the allocation of study leave/CPD is not intended for appraisal preparation or the maintenance of knowledge and skills portfolios.

This policy does not cover time absent from work for personal development unrelated to an individual's working role. Such absence will be authorized as annual leave, or authorized unpaid leave may be considered.

An employee may attend a course/conference in their own time. If it is a requirement of the Trust for the employee to attend, then appropriate time back should be negotiated with the manager of the employee at the time of application.

4. Non Attendance

Non attendance at the event for which leave has been approved will be classed as unauthorised absence unless the employee has notified their manager in line with the appropriate Trust Policy of the reason for their absence.

5. Process for and Approval of Study Leave

In line with current legislation, employees who have the appropriate 26 weeks service with the Trust have the right to request time off to train or study. This requirement applies to internally and externally provided development activity.

For internally provided training, bookings are made using the electronic manager self service booking system, following discussion with the individual regarding the need for the training. If the manager declines the request, then Appendix two is completed and a copy given/emailed to the individual. The appeal process is the same as that for external study leave.

Time off for external study leave/CPD must be made in writing using the form appended to this policy (Appendix six). The employee must ensure that they complete the sections as below:

- Details of the Training or Study, learning outcomes and the course fees

- Where and when it would take place
- Who is providing or supervising the training
- What qualification (if any) would be achieved
- Attach evidence of the course programme and course fees

This form should be sent to the employee's line manager for consideration. The line manager will acknowledge receipt of the request (by letter or email) using the contents contained within the example standard letter (Appendix one).

Final approval via the relevant line manager, Directorate Manager, Matron, Head of Service or Clinical Director is required; using section six of the study leave form. For leave in excess of 10 days, authorisation must be obtained from the Directorate Manger/Clinical Director or Head of service.

The study leave application form is for external study only; in house bookings are through managers using self service within Electronic Staff Record and the request for study leave can be undertaken by email using the contents of Appendix six as a guide.

Agreement to granting study leave will depend upon a number of factors but the training/study should improve the employee's effectiveness at work, benefit the organisation and the employees request should clearly state how the training will bring this about. The total time commitment, the timing of study leave, the relevance of the subject matter and service demands including availability of other staff to meet business needs and ensuring that it supports the organisation's needs and/or the individuals' personal development plan should also be considered. Approving line managers should also consider the amount of paid study leave previously granted to the employee concerned. They must ensure that the proposed representation of Trust employees and disciplines at events such as conferences is not excessive.

Within 28 days of receiving the request an employer should make arrangements with the employee to discuss it in further detail. If a meeting takes place, managers must advise employees of their decision within 14 days of the meeting (unless, alternative arrangements are made and the request is granted without a meeting). Managers must confirm to the employee in writing/e-mail what has been agreed by completing section six of the study leave form for external study leave, ensuring that the details of what is being studied, when and where and associated costs have been correctly completed by the applicant. Internal study leave is confirmed by managers completing the self service booking, and notifying the individual of the confirmed details via email/copy of their notification from ESR.

If the request for Study Leave/Training is denied, the written notification of refusal must clearly state the business case for refusal by the Trust. This notification can be by letter or email, ensuring the relevant information contained within (Appendix two) of this policy. A copy of the notification declining the request must be forwarded to the Education and Training Department.

In certain cases where paid study/CPD leave is not considered appropriate, special leave without pay may be given (within the allowances above) at the discretion of the applicant's manager. This should be confirmed in writing or via e-mail.

If an employee wishes to appeal the decision they must do so within 14 days and further details regarding how to appeal are contained within (Appendix two).

Once an employee has made a request for study leave, the employee cannot resubmit another request for the same study leave event for 12 months.

The Trust (only) may extend the time limits involved in this policy's process using the form appended (Appendix three).

For individuals applying for more than 10 days study leave for one course of study, or for multiple applications to one event then written approval on study leave form by the relevant Directorate Manager, Matron, Head of Service or Clinical Director is required.

Multiple attendees from one directorate or department is likely to result in a reduced allocation per head for funding from the study leave budget.

Where funding is not required from the Trust study leave budget, a copy of approved study leave forms (Appendix six) should be forwarded to the Education and Training Department, and the absence recorded by the manager on ESR by the manager through the manager self service function (MSS).

For part-time non medical staff it would be usual for study leave to be approved on a pro-rata basis. Agreement to this must be reached prior to the submission of all applications, by the appropriate authorizing manager.

Prior to applying for any study leave and/or expenses all staff must have completed those mandatory training programmes as specified relevant to their job role, or have dates confirmed on programmes within the current financial year. Study Leave will not be granted until mandatory training requirements are satisfied. Details of the training requirements are within the Mandatory Training Policy. This requirement applies to internal and external training requests. Details of these must be noted on the application form by the applicant: failure to do so will result in the form being returned to the applicant, and not being considered until completed correctly. Retrospective applications will not be considered.

The number of paid study days granted is at the discretion of the applicant's manager, who must ensure the level of service delivery is not compromised. Managers must determine priorities if several members of staff apply for the same programme. Medical and dental staff allowances are detailed in Appendix four. The following guidance should be applied when granting leave (excluding Junior Doctors).

- (i) **Day Release Students.** Course attendance during term-time only.
- (ii) **Specific Programmed Release Students.**

For those individuals undertaking programmes involving periodic taught modules, release to attend these must be agreed with the manager in advance of the programme commencing.

(iii) **Open/Distance Learning.** Up to a maximum of 5 days per year.

(iv) **Examination Leave (as part of an assessed programme).**

½ day per examination may be granted. Excess travel time requirements must be discussed and agreed at the time of application.

Employees will only be supported for one attempt at an examination set by a public examination board. Assistance for subsequent attempts will not normally be granted

6. Levels of support

Education budget resources demand that a thorough and systematic approach be taken in considering the support offered. All funding requests must reflect identified learning needs in line with the Directorate/Department Training Plan. However, as training resources are limited and must be allocated to ensure equity, there may be occasions when a training request is postponed or refused due to other priorities.

The following criteria are to be used to determine which needs should be considered for support: The approving line manager must confirm the level of support proposed by completing the relevant part of section six on the study leave form. Final approval for funding will be undertaken by the Head of Education and Development, in conjunction with the relevant Head of Service/Clinical Director/Directorate Manager as appropriate. Funding is subject to available resources, and is subject to review on an annual basis. Funding for courses leading to qualification will have a ceiling of £2,500 per financial year, subject to available funding and reviewed annually. In exceptional circumstances when the development is identified as level 1 and exceeds this limit consideration may be given to fund in excess of this and will include a directorate contribution as part of their business planning processes.

Where full funding is not provided, it is possible for staff to have support with payment of the remaining fees through salary deductions. This needs to be agreed as part of the application process and included on the bonding arrangement details. Staff may apply to alternative appropriate funds (e.g. charitable trustees, NMET), subject to the eligibility criteria of the fund holder in addition or instead of the Trust study leave budget. This will be taken into consideration for any applications to the Trust budget and may result in a reduced allocation of funding.

Costs of social events associated with a course or conference will not be paid by the Trust. The payment of registration fees to Professional Bodies is the responsibility of the individual employee. Applications for funding must be received within the Education and Training Service, a minimum of 6 weeks prior to the event where possible. Retrospective applications are not permitted.

It is acknowledged that there will be occasions when various departments/areas in the Trust will provide/host educational and training events for which an attendance charge will be made. The Trust is supportive of such initiatives, but the providing department/individual must not profit from the Trust Education and Training Budget,

i.e. whilst the Trust will consider funding the **actual** costs of an individual staff member's attendance, additional funding will not be provided.

6.1 Sponsorship

Where remittance has been received by an external sponsor, e.g. pharmaceutical company, this must be declared and details provided of what has been funded by whom, within the funding section of the study leave application form. Sponsorship over £25 must be declared in the normal way in the Trust Corporate Hospitality register.

**Table 1. Study Leave funding Criteria & Indicative Level of Support
(All Support is Subject to Available Resources)**

Study Leave Category	Definition	Leave Approval	Course Fees	Travel	Accommodation	Subsistence
Level 1 Essential to role/maintaining service provision Service need/Role Development needed for organisational/business needs or a Trust initiated request for attendance at learning event	Where development is considered to be vital to service delivery or a legislative requirement and identified as an essential business benefit	Paid study leave	Fully funded (except when in house provision is available including University contracted places/NCQs) Subject to bonding for the 100% if leading to a qualification	Fully funded as per travel and expenses policy (except when in house provision is available)	Fully funded as per travel and expenses policy	Funded by directorate if eligible
Level 2 Personal development (CPD) N.B. Colleges and Professional bodies identify it is a personal responsibility for Professionals to maintain their CPD through use of formal and informal learning	Where development is requested by individual and considered to be important and where the proposed study is of equal value to the Trust and the individual	Negotiated leave	50% and subject to bonding agreement for the 50% if leading to a qualification.*	50%	50%	Funded by directorate if eligible
Level 3 Personal development	Where development is considered to be a low service priority and of greater value to the individual but may provide some benefit to the Trust	Negotiated leave	25%	Nil	Nil	Nil
Level 4 Personal development	Where development is not considered of any benefit to the Trust and only for personal development/individual desired. No support will be given					
Overseas Study	Use criteria above to determine % eligibility of funding and to a maximum £800 per annum					
Extended Study (Course of 10 days or more on one occasion)	The principles of funding apply as above, with a maximum amount being applied, subject to available resources. Applications for college/higher education qualifications are only processed twice per annum (June for Autumn intakes and November for spring/summer intakes (excluding UNN contracted CPD) and for one academic year at a time.					

7. Repayment of Financial Assistance

Financial assistance is defined as payment of course fees, travel and subsistence and paid study/examination leave. Employees who receive such assistance to undertake relevant or partially relevant professional qualifications as outlined in the criteria will be required to sign a 'Bonding Agreement' (Appendix five) (Applies to study which leads to acquiring a recognised professional, technical or vocational qualification, diploma, degree, certificate including post graduate study.) As part of the Trust's workforce planning, employees may on occasion be authorized to attend a specialist skills training programme which will require study leave to attend a course on a day or block release basis. Although funding may not be necessary to facilitate attendance, the Trust is investing in employees through ensuring their paid release to obtain specific skills and/or qualifications in order to support the delivery of patient care, and will expect a return on that investment.

In the event of the resignation or termination of the employment within two years of either commencing a course, or completing a course, or the event of non completion of the qualification, the employee agrees that s/he will repay the Trust any financial assistance that has been given.

Line managers are responsible for the completion of the Bonding Agreement and need to ensure that the employee is made aware of the terms and conditions, and this should be received by the Education and Training Service, with the study leave application form, prior to any payment being made or paid leave being granted.

Repayment of Course fees/travel/subsistence:

Repayment of all funding received for these types of courses for staff leaving the organisation on completion (or partial completion if still actively studying) will be as follows:

Staff leaving within	12 months	-	Full amount
	18 months	-	50%
	19-24 months		25%

N. B. NMET funding via Newcastle PCT agreement is currently excluded from this arrangement

Repayment of paid study/examination leave:

In regard to attendance on specific skills training programmes, and in the event of resignation or termination of employment within two years of either commencing or completing a training programme, the employee agrees that s/he will repay the Trust the equivalent of the pro rata salary which will have been made to accommodate day or block release. NMET funded applications are included in this where paid time off for study has been granted by the Trust.

For example:

Day release course attendance = 225 hours study leave equating to 30 days paid study leave, 6 weeks pay at the relevant pay band of the employee.

Repayment of this pay on leaving the organisation (or partial completion if still actively studying) will be as follows:

Staff leaving within	12 months	-	50%
	18 months	-	30%
	19-24 months		25%

This repayment of funding also applies if the individual

- ❖ abandons the course of study to which financial assistance relates for reasons other than illness or being requested by the Trust to work on the relevant study days.
- ❖ in the absence of an adequate reason, fails to present themselves for examination/assessment.

Arrangements to repay the Trust through instalments can be negotiated. In the event of an employee refusing to repay under the above conditions, then the Trust will initiate legal proceedings to reclaim the amount owed.

8. Extended Study

Study leave applications for courses leading to a recognised qualification, e.g. degree/diploma level, with the exception of contracted CPD from Northumbria University, will only be considered twice per annum, in line with the academic year timetable, and as detailed on Table 1. Applications for leave and funding for courses longer than one academic year must be made for each individual year, and are subject to available resources and study leave time as outlined in 5. The extent of financial assistance will be reviewed annually and limited to £2,500 per academic year and will apply to all staff groups. Consideration will be given to previous financial assistance, and to the perceived return on investment to the Trust. No guarantee of funding can be provided, but the Trust would be sympathetic to the ongoing application. If the development is identified as business critical and cost exceeds £2,500 then the supporting directorate will be required to meet the cost through their business planning processes.

It is acknowledged that there will be occasions when individual staff members are granted funding, in addition to that approved from the Trust Education and Training Budget, to complete courses leading to a recognised qualification. It is expected that all staff (with the exception of Trainees) will make a personal contribution towards these fees as per the criteria in Table 1. This is to ensure that equity of financial assistance granted to individuals is maintained, and that personal commitment to undertaking the qualification is endorsed.

9. Overseas Study Leave

A grant **may** be made towards expenses incurred in overseas study events. The expenses will be assessed against costs which would be incurred if the event was held in the United Kingdom, to a maximum limit as outlined in Table 1.

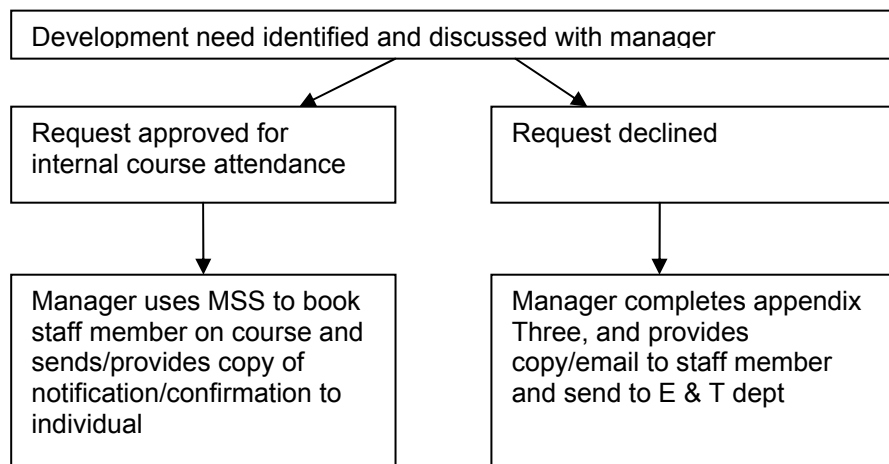
Managers are responsible for ensuring that applications for funding to support overseas study are in the best interests of the Trust, and must also prioritise such applications in line with identified attendance at 'local' events. It is expected that any request will be authorized by a Clinical Director/Directorate Manager, and it is

anticipated that attendance on such a programme will form part of the annual PDP discussion. A grant to an individual towards overseas expenses can only be made once in any financial year.

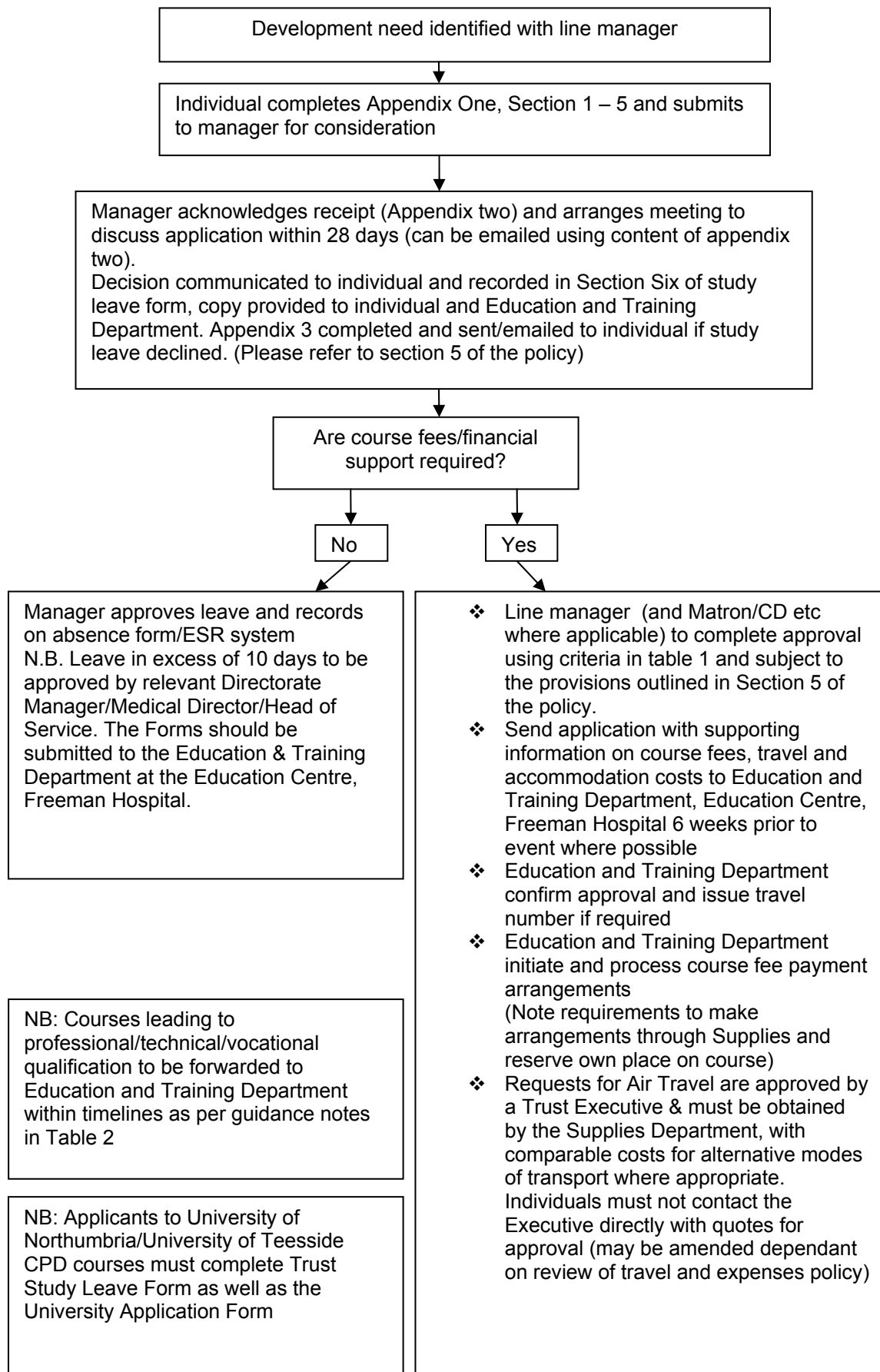
10. Non-Exchequer Funded Posts

A number of individuals, across a range of disciplines, are employed by the Trust, but salaried through other funding sources, e.g. Research Grants. The policy for applying for paid leave must be followed; however, the funding of fees and associated expenses must be approved from the Research Grant, or relevant other source.

11. Internal Study Leave



External Study Leave Application Process



For external study/CPD leave, the **individual employee is responsible for:**

- Obtaining agreement for the leave from their manager
- Obtaining agreement for their application for funding (if required) from their manager and the Education and Training Department
- Confirming a place is available on the course or conference & reserving once confirmation of leave/funding is received.
- Attaching course/conference and fee/travel information to their application (failure to do so will result in the form being returned and delay approval)
- Arranging all public travel and accommodation reservations (if applicable), and must use the Trust Travel Bureau through the Supplies Department
- Approved applicants will receive a travel order number for the Education and Training Department and must have this prior to contacting supplies to book their travel.
- Informing the Trust if they have any external funding to support their attendance at the course/conference through including this on the study leave application form. This includes details of any application to or receipt of a grant from external NMET funding
- Adhering to the Trust Travel and Expenses policy requirements
- Declaring sponsorship in excess of £50.00 in the Register held in the Corporate Services Office, Freeman Hospital.
- Inform their manager and the Education and Training Service if they are not attending the programme. If this is cancelled by the individual and not the Trust (e.g. due to sickness absence, unable to release from service), they will be required to fund any cancellation charges occurred.
- Notifying the programme organizers if they are not able to attend.
-

Application for Contracted University Programme Places (Northumbria University, Teesside University)

The Trust has access to a number of undergraduate and some post graduate programmes from local universities as part of a contract held by the Strategic Health Authority. Applicants for these programmes are not required to pay course fees, nor repay them on leaving the organisation. However they will be required to repay the equivalent of their pro rata salary should they leave or have their employment terminated within two years. Reference Section 7.

Individuals must apply to the University using the specific University Application form and these must be sent to the Trust Education and Training service for approval by the Head of Education and Development, in accordance with the process for Extended Study Leave Applications. Individuals must also complete a Trust Application for Study/CPD form, with supporting line manager approval.

Cascading of Training

Where an employee attends a training event, they are required to cascade the information gained to their colleagues to maximise learning opportunities and evaluate the impact of the learning to their service/practice. This should be discussed with their manager and agreed prior to their attendance.

Temporary Staff

Temporary staffs are welcome to attend any in-house course, whether it is concerned with mandatory issues such as moving & handling, or any other relevant issue.

Bank Nurses who wish to apply for post-registration courses must be in a position to comply with Northumbria University regulations, and should seek advice regarding these. Applications must be made through the Nurse Bank Manager, with agreement reached at this time.

12. Submission of Expenses Claims

Travel arrangements must be made via the Supplies Department and thus reimbursement will only be for mileage or subsistence if approved. Approved course fees can be paid directly by the Trust, but only once notification of funding support has been received from the Education and Training department or Directorate/Department. Payment should be arranged as a BACS credit where possible. **All claims for reimbursement for approved expenses incurred must be received with 6 weeks of attending the event.** Failure to do so will result in claims not being processed. Expenses will only be reimbursed on successful completed/attendance at the programme.

13. Monitoring and Review

This policy will be monitored by the Head of Education and Development, through the Trust Education and Training Group on an annual basis with regard to equity of access, funding support and adherence to the processes outlined.

Appendix One

Example Trust confirmation of receipt of External Study Leave Request Form:

Dear

I confirm that I have received your request for External Study Leave/Training on:
..... (date). I will be arranging to discuss your application with you within 28
days following this date. If we identify the need for a formal meeting you may be
accompanied at the meeting by a work colleague or union representative.

Yours sincerely

Manager

(NB. This form may be amended as appropriate if the discussion has previously taken
place)

To Complete If Request is Denied - Please identify a reason (tick all that are appropriate):

Internal training only: Details of course requested

Title.....**Date**.....

The training will not improve the your effectiveness in role ()

The time off required will have a detrimental impact on the department's performance ()

There are additional costs involved and these are unsustainable ()

The inability to reassign your work among existing staff ()

A detrimental effect on ability to meet demand ()

A lack of work during the period you proposes to work ()

The grounds which specifically apply in the circumstances are:

Signed: _____ Date: _____

Print Name: _____ Designation: _____

You have the right to appeal against the decision. You must write to the Head of Education & Training stating the grounds for your appeal within 14 days of receiving this written notification of the decision. Your appeal will be heard by the level of management above the manager that took the decision.

The Newcastle Upon Tyne Hospitals NHS Foundation Trust

Study Leave/Training – Extension of Time Limit Form

Dear (insert Employee name)

I wish to extend the amount of time that the regulations allow me to:

- Arrange a meeting to discuss your application (28 days) ()

- Notify you of my decision regarding your application (14 days) ()

- Arrange a meeting to discuss your appeal (14 days) ()

- Notify you of my decision regarding your appeal (14 days) ()

I wish to extend the time limit to () days. This means that I will have until (insert date) to complete the necessary action. The extra time is required for the following reason (insert reason)

If you agree to this extension, please sign below and return it to me, retaining a copy for your own records.

Sign:

Date :

Medical and Dental staff Study/Professional Leave

Medical and Dental staff study/professional leave allowances are outlined in the Terms and Conditions document (DH March 2008). See paragraphs 251 – 254 inclusive for details.

For Consultants, Associate Specialists and Specialty Doctors, leave with pay and expenses are available to a maximum of thirty days, in any period of three years for professional purposes within the United Kingdom.

Sponsorship of study leading to a formal Qualification Application and Bonding Agreement

Name and payroll number:		Role:	
Dept:		Directorate:	
Manager:		Telephone No:	

Name and address of University/college or training provider:	Course Title/Qualification: Course duration: Course dates: (Attach course information)
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Full breakdown of costs: (Please detail when the course fees are due for payment)				
	Year 1	Year 2	Year 3	Year 4
Course Fees				
Exam Fees				
Other				
TOTAL				

Details of the level of 'time off' required for attendance (inc. residential programmes etc):

Why is this study required? Link to your KSF outline/PDP requirements

For Manager to Complete:

Time: Indicate which is supported and the amount of days

† Study Leave (time off work to attend study e.g. afternoon/day release)

† Exam Revision (time off to revise for exams)

† Exam Days (time off to sit the required examinations)

It is a requirement that the individual signs a **bonding agreement** to cover the programme or other costs in the event of them leaving? Has this been discussed with them?
Yes/No:

Has the individual **previously requested** support for a professional qualification?
Yes / No
If "Yes" please provide details:

Additional Comments:

Approved by Line Manager Y/N

Signature:

Date:

Name:

Approved by Directorate Manager/Professional Lead/Clinical Director:

Signature:

Date:

Name:

Bonding Agreement

I can confirm that I am aware of the Trust Study Leave Policy and conditions relating to receipt of funding for courses leading to a formal qualification. I am aware that I should leave the Trust, or withdraw from the course for reasons not related to health, or academic achievement, then I will be required to repay the funding provided, and my signature on this document is my consent for the appropriate deductions to be made as follows:

Staff leaving within	12 months	Full amount	
		12 - 18 months	50%
		18- 24 months	25%

N.B. Any outstanding money due will be deducted from the employee's last salary unless other arrangements are made to repay through the finance department.

B I can confirm that I am aware of the Trust Study Leave Policy and conditions relating to provision of authorized paid leave to accommodate day/block release. I am aware that I should leave the Trust, or withdraw from the course for reasons not related to health, or academic achievement, then I will be required to repay equivalent of my pro rata salary should I leave or have my employment terminated within two years. My signature on this document is my consent for the appropriate deductions to be made as follows:

Staff leaving within	12 months	-	50%
	18 months	-	30%
	19-24 months	-	25%

Applicant Name (Please print)

Signature:

Date:

Head of Education and Development

Signature:

Name:

Date:

N.B. Fees will only be paid once the bonding agreement has been signed and returned by the individual to the Education and Training Service, Education Centre, Freeman Hospital.

Copy to HR Personal File

Copy to database

Date:

Signature:

The Newcastle Upon Tyne Hospitals NHS Foundation Trust

STUDY LEAVE APPROVAL FORM

This study leave request form needs to be completed by all staff employed by the Trust who wish to undertake a formal or informal learning activity of any type or duration and have the required 26 weeks service (where applicable) to qualify for study leave. A minimum of 6 weeks approval notice is normally required, exceptions may be negotiated with your line manager, but retrospective applications or requests for funding cannot be approved.

Process

1. Complete all relevant sections following discussion at your appraisal and sign the request form
2. Forward the request form to your line manager for authorisation
3. Manager to log course details as External Course on ESR MSS (see intranet for instructions)
4. Send application to the Education and Training Department, Freeman if funding required from Trust study leave budget

Section One: Personal Details

Full Name (please print)		Contact No:	
Grade		Staff group	
Ward/Department		Site	
Payroll Number		Directorate	

Type of Leave If other please state	Course <input type="checkbox"/>	Conference <input type="checkbox"/>	Study day <input type="checkbox"/>	Exam <input type="checkbox"/>
	Other <input type="checkbox"/>			

Section Two: Study Leave Event

Title of Training Event			
Training Provider			
Venue:			
Dates:	From:	To:	
Previous study leave this financial year (last 3 years for medical staff)	Days to date		Funding to date
Delegate	Yes/No	Conference Speaker	Yes/No
		Poster Presenter	Yes/No

Section Three: Costs to be incurred (please estimate costs if required and provide programme)

Cost of training event (fees)	£
Cost of travel	£
Other associated costs e.g. accommodation	£
Total costs	£
Please indicate funding source (e.g. Trust study leave budget, Departmental budget, charitable fund, research fund, external source)	
Account code	Cost centre

Name of sponsoring company or external source if applicable		£
I confirm that I have declared receipt of sponsorship to the Trust Hospitality register Register.Gifts@nuth.nhs.uk		Yes/No
Self contribution (please indicate % contribution to overall cost)		£

Section Four: Reasons for Request

Why do you want to undertake this study? (Please continue on separate sheet if required).	
How do you anticipate this learning will improve your effectiveness in role? (Please continue on separate sheet if required).	
How will your Department benefit from your attendance on this course? How will you feed this back?	
Was this learning identified as a result of your annual appraisal?	Yes/No
Is this learning necessary to meet Knowledge and Skills Framework requirements? (Exc. Medical Staff)	Yes/No
Is this learning credited e.g. CPD/CATs/CME/CPD Points (please indicate type and amount)	
Name of Clinical Mentor/Assessor if appropriate	
How will your sessions/work be covered?	

<p>Section Five: Mandatory Training</p> <p>Please provide dates and details of mandatory training attendance – CPR, M&H, Fire, Infection Control, H&S</p> <p>.....</p> <p>.....</p> <p>I confirm that all mandatory training is up to date Managers Signature</p>

Section Six: Authorisation

Signature of Applicant: **Date:**

N.B. It is a Trust requirement that all staff undertaking formal learning courses complete the assignments for their study. Your signature denotes agreement to this.

Managers Authorisation and comments (See study leave policy):

Date received from applicant: Date acknowledgement sent to applicant

Date of Meeting/email: Leave Approved Yes/No Funding Approved Yes/No

I confirm individual has not taken more than 30 days study leave in previous 3 years (medical staff only)
Yes/No

Date completed email sent (hold in local file)

Comments (if required):

Level of Support (please refer to study leave policy for advice)

Line Manager – Please indicate category below for events funded from Trust study leave budget.

- Level 1** Essential to role/maintaining service provision/Role Development **100% Trust funding**
- Level 2** Personal development (where development is considered to be important and the proposed study is of equal value to the Trust and the individual) **50% Trust funding**
- Level 3** Personal development (where development is considered to be a low service priority and of greater value to the individual but may provide some benefit to the Trust) **25% Trust funding**
- Level 4** Personal development (where development is not considered of benefit to the Trust and only for personal development/individual desired). **No Trust funding**

Signature of Line Manager: **Date:**

Name (Please Print):

Designation (Please Print):

Study Leave of 10 days or more Clinical Director/Directorate Manager approval required

Signature

Name (Please Print):

Designation (Please Print): **Date:**

Overseas travel or UK flight authorisation Clinical Director/Directorate Manager approval required

Signature

Name (Please Print):

Designation (Please Print): **Date:**

Section Seven: Education & Training Department authorisation use only

Total cost of fees approved **Total cost of travel approved**

Total cost of accommodation approved **No of Days**

Cost Centre.....

Email confirmation sent (Date)..... **ESR updated (date)**.....

NOD arrangements completed..... **Approval No**

Bonding form completed/attached **Y/N**

For courses leading to qualification (vocational, technical, academic).

Signed **Date**

Authorising Officer

THE NEWCASTLE UPON TYNE HOSPITALS NHS FOUNDATION TRUST
IMPACT ASSESSMENT – SCREENING FORM A

This form must be completed and attached to any procedural document when submitted to the appropriate committee for consideration and approval.

Policy Title:	Study leave and continuing professional development	Policy Author:	Head of Education and Development
		Yes/No?	You must provide evidence to support your response:
1.	Does the policy/guidance affect one group less or more favourably than another on the basis of the following: (* denotes protected characteristics under the Equality Act 2010)		
	• Race *	No	Applies equally to all staff
	• Ethnic origins (including gypsies and travellers)	no	Applies equally to all staff
	• Nationality	no	Applies equally to all staff
	• Gender *	no	Applies equally to all staff
	• Culture	no	Applies equally to all staff
	• Religion or belief *	no	Applies equally to all staff
	• Sexual orientation including lesbian, gay and bisexual people *	no	Applies equally to all staff
	• Age *	no	Applies equally to all staff
	• Disability – learning difficulties, physical disability, sensory impairment and mental health problems *	no	But may require reasonable adjustments for staff to access learning provision
	• Gender reassignment *	no	Applies equally to all staff
	• Marriage and civil partnership *	no	Applies equally to all staff
2.	Is there any evidence that some groups are affected differently?	yes	National terms and conditions means that medical and dental staff have an annual allowance of paid study/professional leave
3.	If you have identified potential discrimination which can include associative discrimination i.e. direct discrimination against someone because they associate with another person who possesses a protected characteristic, are any exceptions valid, legal and/or justifiable?	n/a	
4(a).	Is the impact of the policy/guidance likely to be negative? (If "yes", please answer sections 4(b) to 4(d)).	no	
4(b).	If so can the impact be avoided?	n/a	
4(c).	What alternatives are there to achieving the policy/guidance without the impact?	n/a	
4(d)	Can we reduce the impact by taking different action?	n/a	

Comments:	Action Plan due (or Not Applicable):
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Name and Designation of Person responsible for completion of this form: Karen Giles Date: ...27.9.11...

Names & Designations of those involved in the impact assessment screening process: The Employment Policies and Procedures Group

If any reader of this procedural document identifies a potential discriminatory impact that has not been identified on this form, please refer to the Policy Author identified above, together with any suggestions for the actions required to avoid/reduce this impact.)

For advice on answering the above questions please contact Frances Blackburn, Head of Nursing, Freeman/Walkergate, or, Christine Holland, Senior HR Manager. On completion this form must be forwarded electronically to Steven Stoker, Clinical Effectiveness Manager, (Ext. 24963) steven.stoker@nuth.nhs.uk together with the procedural document. If you have identified a potential discriminatory impact of this procedural document, please ensure that you arrange for a full consultation, with relevant stakeholders, to complete a Full Impact Assessment (Form B) and to develop an Action Plan to avoid/reduce this impact; both Form B and the Action Plan should also be sent electronically to Steven Stoker within six weeks of the completion of this form.