



## Training, Education and Development (TED) and Study Leave Policy

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## **1 Statement of Aims and Objectives**

- 1.1. South East Coast Ambulance Service NHS Foundation Trust (the Trust) is committed to providing the highest quality service possible for our patients. To this end, the Trust requires that our colleagues are safe and competent to meet the care needs of our patients.
- 1.2. The Trust is fully committed to investing in the knowledge and skills of its colleagues and lifelong learning for all and aims to ensure that all colleagues are supported to develop the skills which are essential for them to fulfil their job role effectively and to maximise their potential.
- 1.3. As set out in the NHS People Promise, the Trust aims to ensure that opportunities to learn and develop are widely available, and we are all supported to reach our potential.
- 1.4. So that we attract, develop and retain talented people from all backgrounds it is imperative that everyone has equal access to these opportunities, using a fair and transparent process.
- 1.5. The aim of the policy is to clearly outline the Trust's approach to:
  - 1.5.1. Support colleagues in delivering the Trust's vision, which is to become best placed to care, and the best place to work.
  - 1.5.2. Provide all colleagues with clear and detailed guidance on the process for applying for funding and study leave for training, education and development.
  - 1.5.3. Provide clear guidance on the allocation of study leave, funding and resources in support of continuous personal development (CPD).
  - 1.5.4. Make learning available and accessible for all colleagues within the Trust.
  - 1.5.5. Set out the processes for identification of appropriate learning which will be supported by the Trust.

## **2 Scope**

- 2.1. This policy is applicable to all employees in the Trust and sets out the scope for training, education and development and study leave to which all employees must adhere. This policy applies to external training, education and learning that is not part of the Trust's annual training plan. This policy is effective from 1 April 2024.

## **3 Principles**

- 3.1. To be eligible for study leave and or TED funding:
  - 3.1.1. Learning needs must be discussed, identified and approved as part of the colleague's annual appraisal or at other appropriate times of the year, for

example during 1-1s. Ideally, development needs that have been discussed and agreed should be recorded as part of the appraisal process. In the event of appropriate development requests being rejected without good reason, colleagues can ask to discuss with the next level manager.

- 3.1.2. Colleagues must be up to date with at least 80% of their statutory and mandatory training before study leave or CPD funding is approved or have a agreed plan in place at application stage.
- 3.1.3. Learning must benefit the colleague's practice and the service.
- 3.1.4. Training, education and learning must be included on the service's annual training plan as identified through the annual training needs analysis process. Where additional development opportunities become available during the year, these need to be approved through a formal governance route, such as the Education, Training and Development Group or the Clinical Education Sub Group.
- 3.1.5. The Trust aims to be as flexible as possible with supporting colleagues to complete agreed development activities to fit in with their work and personal circumstances. The Trust is committed to supporting development for colleagues that work flexible or different working patters, e.g., part time working, etc.
- 3.1.6. Applications for TED funding needs to be completed using the online form, introduced from 1 April 2024. Colleagues and their manager are responsible for providing accurate and complete information. Applications submitted on the previous 'Training, Education and Development (TED) Request Form' need to be submitted using the new online form.

## **4 Equal access**

- 4.1 It is essential for the Trust to foster an inclusive environment where all colleagues have equal access to opportunities for growth and advancement.
- 4.2 Recognising that colleagues returning to work following a period of absence such as but not limited to maternity leave can significantly impact an individual's availability and capacity to engage in training, deadlines for completing statutory and mandatory training may be extended for those requiring accommodations. Line managers should consider a period of 'easing in' as colleagues become reacquainted with their workplace, they should be provided with protected time to complete their statutory and mandatory training so that they are up to date before applying for CPD.

## **5 Scope of Learning**

- 5.1. Learning can be formal or informal such as through organised courses or objective led self-directed study. Informal learning includes but is not limited to:
- Work shadowing – time out of normal work area observing other practices and can be internal or in external organisations.
  - Workshops, conference, and forums – out of the work area to share good practice and learn from peers/colleagues.
  - Self-directed – time out of work which has clear learning objectives, e.g., for research.
- 5.2. Formal learning includes but is not limited to:
- Accredited learning
  - Regulated Qualifications, whether academic or vocational, at appropriate levels, e.g., level 2, 4, 7, etc.
  - Distance learning programmes
  - Formal online learning
  - Apprenticeship programmes

## **6 Definitions**

- 6.1. *Statutory training* is required to ensure that the Trust is meeting any legislative or regulatory duties.

- 6.2. *Mandatory training* is an organisational requirement to limit risk and maintain safe working practices.
- 6.3. *Statutory and mandatory training* is defined by the NHS Core Skills Training Framework and the Trust's Statutory and Mandatory (Core Skills) Training Policy.
- 6.4. *Role essential training* is required in order that colleagues can fulfil the requirements of their job role and is pre-approved and planned by Heads of Service/Operating Unit Managers considering the individual's agreed job description.
- 6.5. *Developmental training* is that which will enhance the performance of colleagues in their current role, support career or professional development or may benefit the organisation longer term.
- 6.6. *Study leave* – the term study leave covers periods of time when a colleague is absent from their normal workplace to attend a course, conference, seminar, workshop, etc., that is not included in the annual training and development plan for purposes of acquiring knowledge and skills which should be applied in the workplace.

## **7 Responsibilities**

### **7.1. Line Managers**

- 7.1.1. Line managers must ensure colleagues are supported and given protected time to enable them to participate in:
- Statutory training (5.1), Mandatory training (5.2), and any other role essential training (5.4)
  - Any additional training identified as necessary to carry out regulated activities as part of their job duties and to maintain necessary skills to meet the needs of the people they care for and support. Other learning and development opportunities required to enable them to fulfil their role.
- 7.1.2. All managers at all levels are responsible for ensuring all colleagues receives an annual appraisal of their performance and any training, learning and development needs should be identified, planned for and supported.
- 7.1.3. Line managers are responsible for enabling colleagues, where appropriate, to obtain further qualifications appropriate to the work they perform.
- 7.1.4. Line managers are tasked with ensuring appropriate measures are taken in cases where colleagues fail to attend scheduled or registered learning and development activities.

## 7.2. **Colleagues**

- 7.2.1. Colleagues are responsible for taking part in their annual appraisal conversations with line managers and for completing their personal development plans.
- 7.2.2. Colleagues are responsible for taking up any learning and development opportunities identified through their appraisal conversation and for notifying their line manager and the training provider/supplier if they cannot attend booked/registered learning.
- 7.2.3. Colleagues who are health care professionals, or other professionals registered with a health care or social care regulator, must be enabled to provide evidence to the regulator in question. This will demonstrate, where it is possible to do so, that they continue to meet the professional standards which are a condition of their ability to practise or a requirement of their role.
- 7.3. The **Chief Executive Officer** is accountable for ensuring that the Trust has policies in place and complies with its legal and regulatory obligations.
- 7.4. The **Education Training and Development Group (ETDG)** is responsible for the ongoing effectiveness of this policy.
- 7.5. The **Clinical Education Department** is responsible for identifying and where appropriate commissioning training and education programmes that are to be made available for colleagues. The department will work in collaboration with Learning and Organisational Development team to approve requests to access education, training and development or study leave.
- 7.6. The **Learning and Organisational Development** team is responsible for identifying, delivering and where appropriate commissioning non-clinical learning and development to be made available for colleagues in accordance with the Trust's strategic priorities.
- 7.7. **All employees** are responsible for adhering to this policy.

## 8 **Financial Support, protected time, and other educational opportunities**

- 8.1. Study leave for the purposes of this policy is defined as time off work to:
- Attend formal courses/training through colleges, universities, or independent providers.
  - Undertake research.
  - Attend lectures, tutorials and residential.

- Attend informal in-house training/learning sessions.
- Attend teaching or examining programmes of study or qualifications.
- Take examinations.

8.2. Study leave allocation will be determined by:

- Statutory and mandatory training compliance (colleagues must be 80% compliant) at the time of application or have an agreed plan in place at application stage. .
- Team/service and organisational priorities (Operational Plan)
- National priorities
- Integrated Care System priorities
- Appraisal and Personal Development Plan (PDP)
- Duration of the learning programme
- Shift and work patterns and impact on team or service
- Successful completion of the probation period

### 8.3. **Apprenticeships - Off the job training**

8.3.1. Colleagues undertaking a qualification funded by the apprenticeship levy must spend at least 20% of their working hours completing off-the-job training. It can be flexible and doesn't have to mean one day out of the workplace every week. Training can take place online, at the colleague's place of work, at a college, university or with a training provider. Off-the-job training could be a combination of one day per week, part of a working day, blocks of time. Training schedules will be agreed with the appropriate training provider.

### 8.4. **Criteria for study leave and CPD funding applications.**

7.4.1 Equitable access and support for education, training and development is essential. It will not always be possible to support all applications for training or study leave. However, all applications will be considered in accordance with the following criteria:

7.4.2 The proposed study has a clear and explicit link to the directorate or service business plan and the individual's job role and PDP.

7.4.3 The course or conference is of sufficient benefit to the Trust and individual concerned so that the learning is transferable to the individual's current job role and information can be disseminated to colleagues.

7.4.4 The cost of the course or conference is not excessive in relation to its value for development purposes.

7.4.5 The amount of paid study leave granted to the individual is consistent with guidelines in this policy, is appropriate to the actual development need and consistent with study leave granted to other colleagues completing similar development.

7.4.6 The proposed representation of Trust employees and disciplines at the event/course is appropriate. Where more than one individual is attending a course/seminar a clear rationale should be given for supporting this level of attendance.

### **Allocation of study leave and CPD funding**

7.5.1 All colleagues must complete a Training, Education and Development (TED) form/study leave application form. This does not apply to Clinical Education CPD activity which is subject to a separate process whereby applications for advertised CPD opportunities would be made through Clinical Education Marval pages.

7.5.2 CPD funding and allocation of study leave will follow the criteria above and be provided on the following basis:

<b>Type of learning activity</b>	<b>Study Leave</b>	<b>% CPD Funding granted (if applicable)</b>
<b>Statutory and mandatory</b>	100%	100%
<b>Role essential</b>	100%	100%
<b>Developmental/career progression</b> - where there is benefit to the Trust, service and employee	75%	75%
<b>Non-work/career related</b>	0%	0%

Financial support may include but is not limited to:

- Course fees
- Registration/student membership subscriptions
- Examination costs
- Books and study

Other claimable expenses incurred for attendance on the course, development activity or programme, such as travel or overnight accommodation will only be payable in line with the Trust's e-Expenses Policy and Procedure (on the Zone).

Managers will take an equitable and consistent approach to all employees before authorising any study leave. It may be necessary for there to be a 'staggered' approach to multiple applications from colleagues from the same team to ensure service continuity and equity of access to education for all members of that team.

### **Approving TED Funding and Study Leave applications**

Applications submitted to [Organisational.Development@secamb.nhs.uk](mailto:Organisational.Development@secamb.nhs.uk) will be considered on a case-by-case basis and will be considered and approved by the TED panel.

The role of the TED panel is to review and authorise learning and development requests ensuring transparent, fair and equitable allocation of funding. Applications



will be analysed by protected characteristics; appropriate action will be taken to address under-representation where this is identified.

The TED panel will consider applications for any education, learning and/or development which is not part of the annual training and development programme delivered internally or commissioned by the Learning and Development team or by the Clinical Education Department.

The TED panel will meet monthly chaired by the Assistant Director of Organisation Development or a deputy. Quorum is having at least two panel members. Panel members will comprise representatives from Inclusion, Learning and Organisational Development and a nominated representative from the applicant's directorate.

The TED panel will allocate support for applications based on the following considerations:

Criteria as outlined above

The cost of the learning or development opportunity

Support from local management teams

Availability of funding from the L&OD budget, apprenticeship levy, service or department budgets, HEE or other national funding streams

The L&OD team has no responsibility for approving abstraction, paid or unpaid. This will need to be authorised by appropriate operational line managers / budget holders.

For any CPD agreed training or study, individuals must sign a learning agreement to demonstrate their commitment to the learning and development programme and to share their knowledge with their team and the wider teams.

Colleagues who secure funding for CPD will not be penalised if they are unable to complete the funded learning due to circumstances beyond their control.

The Trust will not contribute to professional membership fees, renewing membership fees or annual membership fees.

### **Repayments on non-attendance, non-completion or leaving the Trust**

The repayment of any financial support to employees where the value of the learning activity exceeds £1,000 will be instigated in the following circumstances:

The Trust may act where the employee is consistently absent from the learning programme. If absence is through sickness, reporting procedures as per the Managing Health and Attendance Policy needs to be followed.

Failure/discontinuation of the course. Repayment will only be required if it is considered that an employee contributed to the failure/discontinuation through their lack of application and effort. There is an expectation that all available processes to

support completion of the course (for example mitigating circumstances, intercalation, retake opportunities, etc.) will be exhausted prior to withdrawal.

Repayment of the financial support for learning for employees leaving the Trust is outlined in the learning agreement below.

Each case should be considered on an individual basis in conjunction with advice from the Learning & Development team. Therefore, it is essential for colleagues considering discontinuing qualification study or who are leaving within the specified period to consult their line manager and L&D.

## **7 Monitoring compliance**

- 8.1 The Education, Training and Development Group is responsible for monitoring compliance with this policy.
- 8.2 Compliance will be monitored at the quarterly ETDG meeting.
- 8.3 Non-compliance with this policy will be escalated to the Executive Management Board (EMB).

## **9 Education and Training**

- 9.1 Awareness sessions for line managers and HR colleagues will be provided to ensure that they understand their responsibilities in applying this policy. This will include the potential challenges faced by colleagues returning to work following long term absence and providing guidance on how to support them.

## **10 Audit and Review (evaluating effectiveness)**

- 10.1 This policy will have its effectiveness audited by the Education Training and Development Group (ETDG) at regular intervals, and initially six months after the new policy is approved and disseminated.
- 10.2 Effectiveness will be reviewed using the tools set out in the Trust's Policy and Procedure for the Development and Management of Trust Policies and Procedures (also known as the Policy on Policies).
- 10.3 This document will be reviewed in its entirety every three years or sooner if new legislation, codes of practice or national standards are introduced, or if feedback from employees indicates that the policy is not working effectively.
- 10.4 All changes made to this policy will go through the governance route for development and approval as set out in the Policy on Policies.

## **11 References**

- 11.1 **Care Quality Commission Regulation 18(2)** Persons employed by the service provider in the provision of a regulated activity must;
  - 11.1.1 18(2)(a) receive such appropriate support, training, professional development, supervision and appraisal as is necessary to enable them to carry out the duties they are employed to perform;
  - 11.1.2 18(2)(b) be enabled where appropriate to obtain further qualifications appropriate to the work they perform.

## **12 Financial Checkpoint**

- 12.1 This document has been confirmed by Finance to have no unbudgeted financial implications.