

Non-Mandatory Education, Training & Development (EDT) Policy

Document Profile

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Author	Justine Le Bon Bell
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Version control / changes made

Date	Version	Summary of changes made	Author

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1. INTRODUCTION

1.1 Rationale

This policy aims to ensure that Family Nursing &Home Care, hereafter referred to as the Organisation and its employees meet their duties with regard to non-mandatory development and training. This Organisation regards education, training and development as a priority, and believes that a well-trained and highly motivated workforce will help ensure the delivery of high quality care for our patients and service users and contribute to improved staff experience.

The following drive the necessity for organisations to ensure the right staff receive the right training at the right time: recent UK government inquiries and publications (Francis, Keogh, Cavendish and Berwick (2013)); agendas to modernise nursing and scientific careers (e.g. NMC standards for an all graduate profession); changes to curriculum (e.g. NVQ's and apprenticeships (Richard's Review (2012)); and the Health and Wellbeing agenda (Boorman 2009).

This document outlines key responsibilities for those who co-ordinate, deliver and undertake non-mandatory training. This policy should be read in conjunction with the mandatory training policy as well as other relevant guidelines and procedures on the Procedural Document Library

1.2 Scope

This policy is applicable to all staff employed by the Organisation, including permanent staff, individuals engaged via a contract for services, and individuals engaged on a fixed term contract of employment. For individuals engaged via an agency and co-located staff, this policy does not apply.

Students on placement and bank staff are required to undertake mandatory training but the Organisation is not obliged to provide non-mandatory training. It will remain the discretion of the mentor/supervisor and Education, Training and Development (EDT) as to whether students and bank staff will be able to participate in any non-mandatory training activities/courses.

This policy aims to ensure that the Organisation and its employees meet their duties with regard to non-mandatory development and training (mandatory training is covered in the Mandatory Training Policy).

1.3 Role and Responsibilities

Chief Executive Officer

The Chief Executive is ultimately responsible for ensuring that training provision is appropriate for the strategic needs of the organisation, and aligns workforce planning with educational provision.

Role of Committee

The committee has oversight over education and development processes:

- To ensure that learning and development arrangements are in place and adequate.
- To review compliance levels across the Organisation and to identify strategic level actions to support improvement.
- To ensure that adequate resources are allocated to meet the Organisational commitment to non-mandatory training.

Head of Quality, Governance & Care

The Head of Quality, Governance and Care has delegated authority from the Organisation to scrutinise and risk assess existing training provision to ensure the right training is being provided in the right way to the right staff at the right time in accordance with statutory and regulatory requirements in addition to local risk assessment

The Head of Quality, Governance and Care is also responsible for:

- Communicating to the Senior Management Team and Organisation's Committee any recommendations made by the Education & Development Lead for authorisation.
- Overall co-ordination of the organisation's education, training and development provision.
- Ensuring effective collaboration between the EDT team, other departments and across all staff groups internal and external to the organisation.
- Leading on the development, implementation and monitoring of strategy, systems and processes for EDT to ensure the organisation achieves its objectives.
- Monitoring evaluation, attendance and results from training and educational activities to assure quality and value for money, addressing any issues as appropriate.

Quality, Assurance, Governance and Performance Group

The Quality, Assurance, Governance and Performance Group's role is to ensure the best use of the available budget and equity of leaning. Representatives from the Senior Management Team, Quality and Governance Team and Operation Leads will review each applicant who presents their case for education, conferences and courses and/or training that costs over (£150). This will apply to:

- Training for individuals and to teams where there is a cost to training that is considered essential.
- Role specific and key trainer qualifications and updates.
- Courses that are relevant to development and improvement of services and role redesign.
- Staff development linked to the Skills and Competency Framework.
- Development opportunities identified in PDP process.
- Career progression and personal development.

The Education, Training and Development Department (EDT)

For courses that are organised by EDT, the EDT Team will:

- Maintain the organisation's training information on the Assure Learning Management System.
- Be responsible for maintaining data quality within Assure Learning Management System to ensure it matched to the Electronic Staff Record.
- Manage, facilitate, advertise, record attendance, evaluate training programmes and review evaluations of training and amend provision as required.
- Manage and assist with the planning, booking and delivery of courses and conferences and arrange any resources required for the training.
- Book and secure training / event venue and ensure relevant equipment is available.
- Requesting that trainers have provided lesson plans for all teaching sessions and have provided a copy to the Education and Training Department as a record of the activity if required to produce evidence of the teaching.
- Ensure that sufficient activities are scheduled and take appropriate action when sessions have to be cancelled or rescheduled.
- Ensure that appropriate support and resources are available to enable development.
- Accommodate bespoke requests (as negotiated) for interventions such as team development, change management support and coaching.
- Monitor the quality of training.

For courses that are not organised by EDT, the EDT team will (unless otherwise negotiated):

- Update the Assure Learning Management System on receipt of the completed course attendance list.
- Provide support and training for those employed by the Organisation who deliver training.

For external courses that are being paid for through the central training budget, the EDT team will:

- Work with Operational Managers to discuss the training needs of their departments to put together a training needs analysis within budget.
- Coordinate the central training budget.
- Process applications for activities and arrange payments where appropriate.
- Charge departments for staff who cancel their place close to the course date or, who do not attend on the day, where appropriate.
- Negotiate with external providers to ensure high quality, value for money training activities are commissioned.
- Co-Ordinate any conferences or Events planned on behalf of FNHC.
- Collaborate and maintain good working relationships with internal and external stakeholders.
- Recognise and celebrate achievement.

- Provide guidance for personal development and career progression to support pathways, succession planning and talent management.
- Provide learner support and high quality practice experiences that meet the requirements of practice-based learning.
- Ensure that access to development and training activities is fair and equitable to all staff. If any member of staff feels this is not the case they should discuss this with their line manager or the Head of Quality, Governance and Care.
- Actively seek external funding for development and training activities.

The Education & Development Lead

The Education & Development Lead is responsible for:

- Presenting funding applications to the Clinical Governance and performance Board.
- Processing applications for funding in line with this policy document and ensuring that contracts are signed and copies sent to HR and Finance.
- Work with individual and department to source appropriate training, courses and conference opportunities when applicable.
- Working collaboratively with External training providers including Universities and private training providers.
- Oversee any conferences or events planned on behalf of FNHC
- Monitoring course attendance and cancellations and to raise any concerns to the Team leads and or the Head of Quality, Governance & Care.
- Escalating any compliance issues to the Head of Quality, Governance & Care for further action as required.
- Review and discuss compliance issues at the Quality, Assurance, Governance & Performance meeting highlighted in the Divisional Dashboards.

Subject Leads and individual Trainers

All staff who deliver training will undertake and evidence Continuing Professional Development (CPD) in relation to their subject(s) and skills as a learning and development practitioner. Subject leads are in house experts and are responsible for ensuring that mandatory training is provided in a way which supports national guidance and Organisation policy based on best practice. Staff who regularly deliver training (once a month or more) will undertake a train the trainer course and/or undertake a recognised teaching course. Trainers are responsible for:

- Ensuring a record of their professional and teaching qualification is held on the Education, Training & Development Department's register of trainers and that any additional/supporting details are provided.
- Ensuring they have appropriate skills in order to be able to deliver training.
- Undertaking and maintaining evidence of CPPD (continued personal and professional development) in relation to their subject(s) specialism.
- Gaining support from their manager to allow them to have protected time to deliver training by means of a written agreement detailing time

- commitments and support that is signed by both the trainer and the manager.
- Ensuring that EDT procedures and guidelines are adhered to.
- Informing EDT at the point they are considering development of a new course/activity or changes to an existing course/activity.
- Delivering high quality training.
- Ensuring venues are booked and providing information about the training to EDT in good time for events to be arranged and advertised.
- Ensuring they have lesson plans for all teaching sessions and provide a copy to the EDT as a record of the activity if required to produce evidence of the teaching.
- Ensuring all learning resources are provided to delegates.
- Ensuring delegates sign the attendance sheets, and return them to the EDT.
- Ensuring delegates are aware of how to submit an evaluation, review evaluations of courses and amend provision as required.
- Submit summary of evaluations for Education, Training & Development Department as requested where relevant.
- Ensuring that sufficient activities are scheduled to enable all staff to complete the relevant training programmes identified in the Mandatory Training Needs Analysis.
- Monitoring course attendance and cancellations and to raise any concerns to the Education & Development Lead.
- Reviewing the quality and content of learning resources and e-learning modules annually and updating them as required and as appropriate.
- Starting and finishing taught sessions on time.

Managers

Managers are responsible for:

- Ensuring that EDT procedures and guidelines are adhered to.
- Approving any study leave according to Organisation guidance considering whether training is essential for role.
- Discussing with their members of staff during appraisal any training requirements that are needed in line with business plans.
- Ensuring that course details, time commitment and costings have been discussed and are included in the application.
- Ensuring that training is accessed fairly and effectively by all staff, is relevant and in line with staff development outlined in the competency framework and PDP discussions.
- Ensuring staff complete all their mandatory training (or have booked to attend) prior to undertaking any other training or education activities (refer to the Mandatory Training policy).
- Ensuring that staff are not authorised to take study leave for nonmandatory education and development unless they are up to date with their mandatory training.
- Ensuring that staff are given 'protected time' and are released to enable them to attend the training.
- Encouraging staff to use and share newly acquired knowledge and skills.

- reducing the numbers of those who 'Did Not Attend' (DNA) for training by ensuring that staff inform EDT if they are unable to attend pre-booked courses/sessions with as much notice as possible. This will enable EDT to fill places from waiting lists and ensure that courses remain viable.
- Reporting, as required, to advise how the training activity has impacted the service.
- Ensuring that any training undertaken is reported to the Education, Training & Development Department so that the Electronic Staff Record can be updated.
- Informing the EDT as soon a possible if their team member is unable to attend and rebook them on to the next available session.
- Managers should ensure that EDT are informed if any staff member is off work on long term sick or maternity leave so that their training account can be suspended on the Learning Management System.
- Ensuring that staff who have committed to delivering training for the Organisation have a written agreement detailing time commitments and support that is signed by both the trainer and the manager and that they are released to deliver this training.

All Staff (excluding agency and co-located staff)

Individual staff members are responsible for:

- Ensure that EDT procedures and guidelines are adhered to.
- Discuss training requirements and opportunities with their line manager during appraisal.
- Understanding and monitoring their own compliance with the mandatory training requirements for their role.
- Complete (or book) mandatory training prior to undertaking any further personal development (refer to the Mandatory Training Policy).
- Follow process for application for funded training (Appendix 2), following discussion with line manager, complete application forms and submit to EDT Lead for processing in accordance with EDT guidelines.
- Research details of course / conference e.g. costs, time commitments, travel and accommodation and include in application.
- Once funding has been agreed, discuss any requirements for travel and accommodation with EDT so that bookings can be processed.
- Submit any agreed expenses in line with Organisational policy.
- Discuss release from work for study and protected study time with their line manager.
- Ensure that they attend the course for which they are booked.
- Notify the EDT admin team, the course organiser and their manager as soon as they are aware they will not be able to attend either an in-house or external training course/event.
- Take ownership of their own training, development and learning.
- Consider and seek a variety of modes of study for Continuing Personal and Professional Development (CPPD) (e.g. distance learning, reflective practice, participating in projects, work shadowing).
- Put to use and be prepared to share knowledge and skills with colleagues (when appropriate).

- Participate in the evaluation process when required.
- Keep any information which will be useful evidence for discussion during their Appraisal.

2. POLICY

Continually updated information related to EDT processes and procedures can be found in Central Filing in the Education and training folder under Booking Information, these include:

- The procedure for accessing/booking development and training activities.
- Guidance for funding of development and training activities
- Study leave and expenses guidance
- Booking forms

Individuals and managers are jointly responsible for notifying the EDT department if the individual is not able to attend the training.

If, for whatever reason, the course is cancelled the applicant must inform their manager and make themselves available for duty.

3. PROCEDURE

3.1 Identifying Training needs

When identifying training needs for the Organisation the following things should be considered:

- Key strategic aims.
- Essential training.
- Succession planning.
- Continuing Professional Development (CPD).
- Personal Development Plans (PDP)
- Competency Framework.

All training identified within PDP's is not guaranteed but every effort is made to accommodate appropriate needs which meet the Organisations strategic aims and requirements. Training identified in PDP's should be submitted to the Education Lead by the end of July of each year, for forward planning purposes and to be included in the Annual Training Needs analysis (TNA). Anticipated costs for departmental specific mandatory training should also be submitted to the Education Lead to be included in the included in the TNA.

The Organisation recognises that each year, various companies and training bodies provide new information on education and conferences. Additionally there may be internal and external incidents that prompt training provision.

- New Training Opportunities These will be considered and the need prioritised.
- **Incident Management** training will be sourced/developed and provided in response to a specific demand.

3.2 Applying for study leave, funding and costs associated with training, courses and conferences.

When an individual, group or department has identified the training, course or conference they wish to attend or facilitate this will need to be discussed with the appropriate Line Manager, Operational Lead and Education Lead to seek approval and gain support. Staff must complete all their mandatory training (or have booked to attend) prior to undertaking any other training or education activities (refer to the Mandatory Training policy).

The appropriate application form will then need to be completed (see flow chart, Appendix 2). Applicants should provide details of the course conference to be booked with the application along with any estimated / costs.

- Free Training for courses that are facilitated externally to the Organisation a Free training Request form should be completed to enable the EDT to process the booking and update staff training record (Appendix 4).
- Costs under £150 can be approved directly by the Education Lead and processed accordingly following submission of the under £150 application form once signed by the line manager (Appendix 5).
- Costs over £150 the over £150 form will need to be completed and signed by the applicant and Operational Lead, then submitted to the Education Lead for presentation at the Quality, Assurance, Governance and Performance meeting (Appendix 6).

If the application is approved a letter (appendix 9) will be sent to the individual, group or department lead outlining the terms of the approval along with a contract for the individuals and Operational Leads to sign. If the application is unsuccessful a letter (appendix 10) will be sent out detailing the reasons and any actions that may be required.

Occasionally funding and approval needs to be agreed outside of the Quality Assurance, Governance and Performance meeting, this should only be required in exceptional circumstances. If approval is granted outside of the usual process an email confirming the course details and approval should be sent to the Education Lead and Education Assistant so that the booking can be processed. Forms will need to be completed and signed retrospectively.

3.3 Contracts

Two types of contracts are available to staff for funded courses and this will be discussed and agreed as part of the terms of the funding and each application will be considered individually. The terms of the contracts are outlined as follows:

Over £150 fully funded contract (Appendix 7)

The applicant has been granted full funding for the course, this may also include time to attend he course, protected study time and travel and accommodation costs.

FNHC will pay the full course/conference costs in full before the course/conference starts. If the applicant:

- Withdraws from the course before the completion date, or fails to successfully complete the course they will be expected to repay 100% of ALL costs (travel, accommodation, full course/conference fees, staff replacement costs) unless there are extenuating circumstances, in which case the SMTs discretion will be necessary.
- Resigns from FNHC within ONE year of successfully completing the course/conference a 100% refund of ALL costs (travel, accommodation, full course/conference fees and staff replacement costs) will be recouped.
- Leaves FNHC within TWO years of completion of the course/conference a 50% refund of ALL costs (travel, accommodation, full course/conference fees, staff replacement costs) will be recouped.

The repayment will either be in one payment to cover all costs and taken directly out of the individual salary or a payment plan will be set up to take the money to be repaid directly out of their salary.

The Manager or the Education and Development Lead can ask for progress reports relating to this course from the training provider, or demand at reasonable intervals any information or documentation necessary to ascertain the Employee's progress with the said course.

Over £150 costs on an 80:20 basis (Appendix 8)

The applicant has been granted funding for a course or conference on the basis that FNHC will pay the full course/conference costs in full before the course/conference starts, and the applicant agrees to reimburse to FNHC 20% of the course/conference fee if it is over the £150 threshold.

The applicant can pay the 20% of the conference/course fees either in full or on a payment plan as agreed with their divisional manager and the finance manager.

The terms for repayment if the individual leaves the Organisation with one – two years are outlined under the fully funded contract.

3.4 Costs / Expenses

Some costs and expenses may not be finalised until after completion of booking or may be ongoing if the course takes place over a number of months or years and may include associated travel costs. In this case an estimate of expected costs and travel requirements will need to be included in the application. A list of allowable expenses a booking guidelines is detailed below:

Cate	Description	FNHC Funding	Examples
gory A	 Organisation Mandatory training Role specific essential qualifications and updates Key trainer essential qualification and updates Relevant and appropriate to developments of services within FNHC Service Improvement and role redesign 	allowance 100% course or conference fee paid 100% Time allowed for classroom/confer ence attendance 100% Funding for travel and accommodation for off Island study	Masters Level SCPHN District Nurse Qualification Conference CMI / RQF
В	 Personally advantageous to the individual as identified in the PDP Individual development relevant for current role Career progression 	80% course or conference fee paid 100% time allowed for classroom/conference attendance 80 - 100% Funding for travel and accommodation for off Island study	Degree modules Conference / Study day / away day Learning events
С	 Personal Development not directly related to current role. No benefit to FNHC 	0% funding for course or conference Some time off may be granted 0% funding for travel and accommodation	Courses/ Conference / Study day / away day Learning events that are not relevant

- Flights / travel Flights and travel arrangements will be made as close to the
 course conference time as possible to reduce the need for accommodation
 expenses. The most economic travel plan will be discussed and arranged with
 the individual applicants / trainers. If individuals wish to extend their stay, this
 will need to be discussed and agreed with their line manage and EDT, only
 expenses associated with the course/conference will be covered.
- Accommodation As a guide a maximum amount for accommodation per person/per night would be £150 depending on time of booking and location of event in a Premiere Inn style hotel on a bed and breakfast board basis.
 If individuals wish to stay in more prestigious accommodation, they may book this themselves and claim back via expenses up to £150 per night.
- **Sustenance** FNHC do not cover the cost of lunch, dinner and refreshments for individuals who are attending courses / conferences off Island unless this is included in the cost of the event.
- Other expenses travel costs that are considered reasonable can be claimed back via expenses.

3.5 Study Leave Entitlement

Most staff will be allocated time to attend courses and conferences, for study that involves assessments and exams e.g. CMI / Degree / Masters modules consideration will be given for study time, his will need to be discussed and agreed with line managers and Operational leads using the following guidance:

Distance learning

Those undertaking Degree / Masters study as distance learning will be entitled to 5 days per module study time as classroom attendance is not required.

Degree and Masters

Further time for personal study for agreed masters and degree will amount to no more than 5 days per year and will be discussed and agreed with the individuals line manager and will be apportioned to the individuals working hours (one day equals one fifth of a working week).

Other Module based study

For other module based study, time will be given to attend the course and 1 day per module will be allowed for personal study.

3.6 Booking Rooms / Venues

When training, courses or conferences has been identified and approved, a suitable venue will need to be secured, if there is a cost implication this will need to be included in the application. The venue will be determined by number of people attending, equipment required, cost, location, accessibility and suitability for event.

Details of this will need to be discussed with EDT. Venues that are freely available to FNHC will be considered in the first instance. Some venues give charities preferential rates and loyalty rates to FNHC and would need to be considered.

Event planning and resources required including lunch and refreshments if relevant, will be co-ordinated by EDT and documented on Event Planner list (Appendix 12). Generally lunches are not provided on a regular basis by FNHC, however in the event that the training is being sponsored or costs covered this will be considered.

When considerable cost is involved e.g. conference planning, this will need to be discussed with Finance Manager and details of costs and charges outlined in a proposal document.

3.7 Booking External Trainers

External trainers are utilised for mandatory training, department specific training, Organisational training, conferences and events. The cost of using these trainers will need to be considered and included in any application for training.

Communication with and co-ordination of these trainers is usually undertaken by EDT, specifically when travel costs are involved (see appendix 3).

Details should be discussed with EDT to enable effective communication and coordination of bookings, travel and event requirements.

4. CONSULTATION PROCESS

Identify who has been involved and when including service users and partner agencies

Name	Title	Date
Claire White	Head of Quality Governance & Care	
Elspeth Snowie	Clinical Effectiveness Facilitator	
Tia Hall	Operational Lead Adult Services	
Michelle Cumming	Operational Lead Child & Family Services	
Clare Stewart	Operational Lead RRRT	
Jane Salt	Finance manager	
Tracey McLeod	HR Manager	
Marge McGarry	Home Care Manager	
Rachel Evans	Education & Development Assistant	

5. IMPLEMENTATION PLAN

A summary of how the document will be implemented with time frame

Action	Responsible Person	Planned timeline

6. MONITORING COMPLIANCE

Activity and issues related to non-mandatory education, training and development will be reported and monitored by the Quality and Governance Assurance Board. Line managers can request activity reports from the Assure Learning Management System from Education, Training and Development.

7. EQUALITY IMPACT STATEMENT

A statement to show that the document does not discriminate against disadvantaged or vulnerable people

Family Nursing & Home Care is committed to ensuring that, as far as is reasonably practicable, the way services are provided to the public and the way staff are treated reflects their individual needs and does not discriminate against individuals or groups on any grounds.

This policy document forms part of a commitment to create a positive culture of respect for all individuals including staff, patients, their families and carers as well as community partners. The intention is to identify, remove or minimise discriminatory practice in the areas of race, disability, gender, sexual orientation, age and 'religion, belief, faith and spirituality' as well as to promote positive practice and value the diversity of all individuals and communities.

The Family Nursing & Home Care values underpin everything done in the name of the organisation. They are manifest in the behaviours employees display. The organisation is committed to promoting a culture founded on these values.

Always:

- ✓ Putting patients first
- ✓ Keeping people safe
- ✓ Have courage and commitment to do the right thing
- ✓ Be accountable, take responsibility and own your actions
- ✓ Listen actively
- ✓ Check for understanding when you communicate
- ✓ Be respectful and treat people with dignity
- ✓ Work as a team.

This policy should be read and implemented with the Organisational Values in mind at all times.

8. GLOSSARY OF TERMS

Glossary consisting of definitions of technical or specialised terminology used within the document

All staff – refers to all permanent staff employed by FNHC.

EDT – refers to the Education, Training and Development Team.

Mandatory Training – refers to any subjects or knowledge required either by statute or policy; by legal obligations of the Organisation, its managers and individuals; guidance or requirements from professional and regulatory bodies (such as the Nursing and Midwifery Council); or by the organisation itself to minimise risk, support the delivery of services, patient care and requirements between employer and employee/individual, and maintain compliance with the required standards.

Non-Mandatory Training - refers to any subjects or knowledge that are not statutory or mandatory training, this includes, external courses, conferences, apprenticeships and leadership courses. These may be 'essential for role', for CPPD or personal, career aspiration.

Training Matrix -This is a report produced by the Education Department's Electronic Staff Record, it can produce individual, team and organisational information and reports.

The Organisation - refers to Family Nursing & Home Care.

9. REFERENCES

Documents referred to in the document.

Use Harvard convention https://www.ukessays.com/referencing/harvard/

10. APPENDIX

Additional material needed to support the document

Appendix 1: Equality Impact Screening Tool

To be completed and attached to any publication document when submitted for approval and ratification.

Stage 1 - Screening				
Non-Mandatory Educ Development (EDT) P				
Date of Assessment		Responsible Department	Governance	
Name of person completing	Justine Le Bon Bell	Job Title	Education Lead	

Does the policy/function affect one group less or more favourably than another on the basis of :

	Yes/No	Comments
• Age	No	
Disability Learning disability; physical disability; sensory impairment and/or mental health problems e.g. dementia	Yes	Some courses that require physical activity would ned to be considered on an individual basis. All other courses, conferences should have provision to accommodate disabilities. Specific requirements will need to be considered on an individual basis and every effort made to accommodate any specific needs. The same will apply to travel and accommodation.
Ethnic Origin (including hard to reach groups)	No	
Gender reassignment	No	
Pregnancy or Maternity	Yes	Some courses / training may be unsuitable for pregnant mothers and would need to be assessed on an individual basis.

• Race	No
• Sex	No
Religion and Belief	No
Sexual Orientation	
If the answer to all of the above questions is NO, the EIA is complete. If YES, a full impact assessment is required: go on to stage 2, page 2	

Stage 2 – Full Impact Assessment

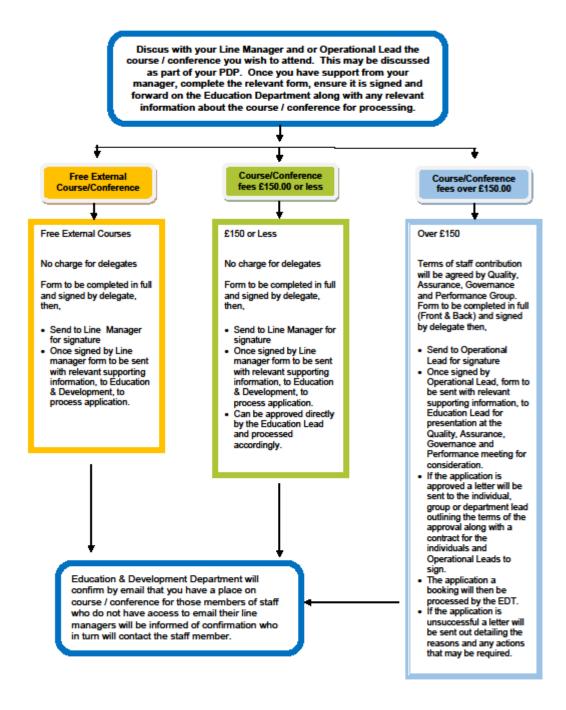
What is the impact	Level of Impact	Mitigating Actions (what needs to be done to minimise / remove the impact)	Responsible Officer
Se above as detailed in the comments section.		As detailed above circumstances would be assessed on a case by case basis.	

Monitoring of Actions

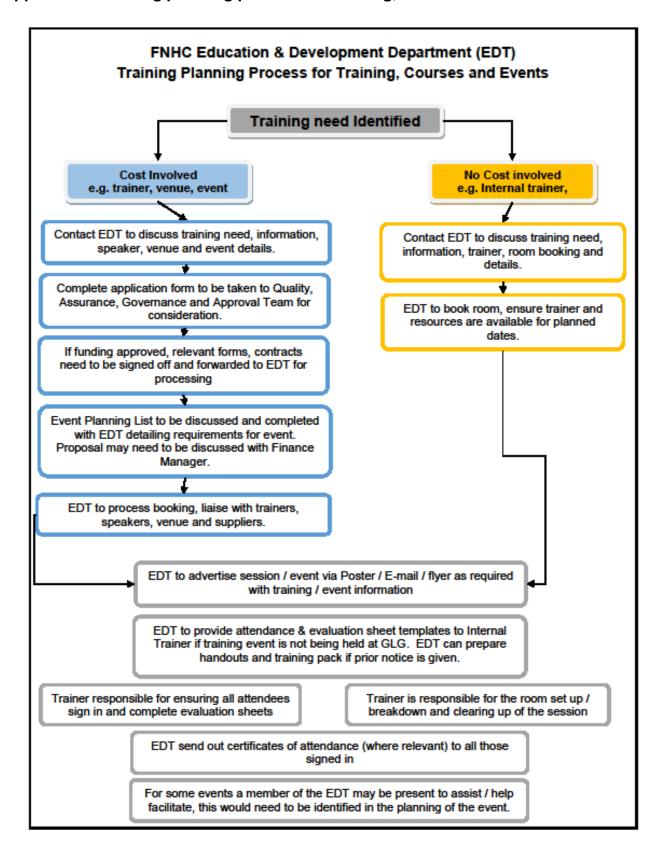
The monitoring of actions to mitigate any impact will be undertaken at the appropriate level

Appendix 2: FNHC Guidance for applying for study leave, funding and costs associated with training, courses and conferences.

FNHC Guidance for applying for study leave, funding and costs associated with training, courses and conferences.



Appendix 3: Training planning process for Training, Courses and Events



Appendix 4: Education and Development Request Form Free External Courses

EDUCATION AND DEVELOPMENT REQUEST Family Nursing & Home Care **FREE External Courses**



Name of Delegate		Telephone No			
Job Title	Department				
Team Lead		Operational Lead			
Date of Application		Discussed with			
Mandatory training completed and up to date – face to face	Yes No C	Mandatory training completed and up to date – eLearning	Yes □ No □		
Is this part of PDP?	Yes No C	Is this safeguarding training?	Yes No		
Is learning required as part of role?	Yes No				
Proposed Course / Conference Title					
Course venue		Date			
Aim of Course	Please identify by ticking one of the options below To Gain Professional Skills				
	☐ To Gain Additional Knowledge	•			
Reason for attending					
Benefits to the Individual / Team / Organisation					
Relevant Information abo course/ conference attack to application					
I agree to provide feedback on the Course/Conference. N/A					
AUTHORISATION	to initiate Education and	Developmen	t		
Applicant Signature Date					
Line Manager/Supervisor Date					
Office Use Only					
Proceed Inv	vestigate further	n not to be take	n up at this time 🗌		
Education & Developm	ent Co-Ordinator Agreement	Yes □	No 🗆		
Action Taken: Confirme	d On Course 🔲 Entered on Data	Base 🗌 Email	Confirmation Sent		
	thorisation from your Line Mana				

Free Training Request 2020 blank

Appendix 5: Education and Development Request Form Under £150

EDUCATION AND DEVELOPMENT REQUEST

©⊖⊙ Family Nursing & Home Care £150 or less - all costs covered by FN&HC

Name of Delegate Telephone No					
Job Title			Department		
Team Lead			Operational Lead		
Date of Application			Discussed with		
Mandatory training completed and up to date – face to face	Yes 🗌	No 🗌	Mandatory training completed and up to date – eLearning	Yes No	
Is this part of PDP?	Yes 🗌	No 🗆	Is this safeguarding training?	Yes 🗌 No 🗌	
Is learning required as part of role	Yes 🗌	No 🗌			
Proposed Course / Conference Title					
Course Venue			Date		
Reason for attending					
Benefits to the Individual / Team / Organisation					
Relevant Information about course/ Yes No Conference attached to application					
COStS — please complete all cost details as appropriate					
	Cost				
Course/Conference Fee	F	FN&HC will pay for course/conference when fee is £150 or less			
Flights/Ferry	F	Flights/Ferry costs will be met in	n full by FN&HC		
Other transport costs	E	Estimate of all other transport costs (Final costs to be agreed retrospectively)			
Accommodation (B&B)	FN&HC will pay for Bed and Breakfast – all other meals to be paid for by staff member				
Total					
I agree to provide feedback on the Course/Conference.					
AUTHORISATION to	o initia	ate Education and	Development		
Applicant Signature	Date				
Line Manager/Supervisor	r/Supervisor Date				
NB: Falsely completing your Line Manager/Supervisor authorisation may result in disciplinary proceedings					
Office Use Only Proceed Investigate further Education not to be taken up at this time					
Education & Development Co-Ordinator Agreement Yes No					
Education & Development		nator Agreement	Yes 🗌 💮 N	lo 🗌	
Action Taken: Confirmed o	Co-Ordin				
Action Taken: Confirmed o	Co-Ordin		se Email Confirmatio	on Sent 🗌	

Training under 150 Request 2020 blank - Copy

10/13/2020

Appendix 6: Education and Development Request Form Over £150

EDUCATION AND DEVELOPMENT REQUEST © © Family Nursing & Home Care

Name of Delegate			Telephone No						
Job Title			Department						
Team Lead			Operational Lea	d					
Date of Application			Discussed with						
Mandatory training completed and up to date – face to face	Yes 🗌	No 🗌	Mandatory traini completed and u to date – eLearn	up	Yes	No			
Is this part of PDP?	Yes 🗌	No 🗌	Is this safeguard training?	ding	Yes _	No			
Is learning required as part of role	Yes 🗌	No 🗌							
Proposed Course /Conference Title									
Course Venue				-	Date				
Aims/objectives of Course/conference									
Reason for attending									
Time commitment to attend course / conference									
Benefits to the Individual / Team / Organisation									
Supporting informatio Managers rationale in or not of the application	support								
Relevant Information a course/ conference at to application		Yes No 🗆							
Approximate Cost	s – pleas	se complete all cost de	etails as appro	priate	9				
	Cost	FNHC (80% of the course/conf	erence fee)		member of cours		feren	ce fee)	
Course/Conference Fee	£	£		£					_
Flights/Ferry	£	Flights/Ferry costs will be	met in full by FNHC	if agre	ed				
Other transport costs	£	Estimate of all other transp	port costs (Final co	sts to	be agreed	l retros	pectiv	rely)	
Accommodation (B&B)	£	FNHC will pay for Bed and	FNHC will pay for Bed and Breakfast – all other meals to be paid for by staff member						
Grant or Self-funding	£	Indicate if any grant, spons	Indicate if any grant, sponsorship or self-funding is contributing towards costs						
Total	£								
AUTHORISATION	to initiat	ite Education and Development							
I agree to provide feed	lback on t	he Course/Conference.			Yes	N	0	N/A	1
Applicant signature			Date						
Operational Lead sign	ature		Date						
When you		horisation from your Oper				il form	to		

Training over 150 Request 2020 blank

10/14/2020

EDUCATION AND DEVELOPMENT REQUEST Costs Over £150

For course/conference over £150 Education and Development Funding

Date of SMT meeting					
Application approved					
Application rejected					
Details of Funding / Support to be provided by FNHC					
Funding					
Flights, travel, accommodation					
Time to attend study sessions					
Protected study time					
Signature of SMT Chair		Signature of Education Lead			
Signature of Quality & Governance Lead		Signature of Employee			
Final Costs – detailed br	eakdown				
Course/Conference Fee			£		
Flights/Ferry			£		
Other transport costs			£		
Accommodation (B&B)			£		
Other Costs			£		
Grant or Self-funding			£		
Cost to Staff member (20%	of course fees)		£		
Cost to FNHC (80% of cour	se fees)		£		
Total Cost of the course/co	onference		£		

One completed copy for Education & Development and one completed copy for employee.

Electronic copies will be provided to Finance and HR by Education & Development.

Appendix 7: Education and Development Contract Over £150 Fully Funded

EDUCATION AND DEVELOPMENT CONTRACTOver £150 – Fully Funded by FNHC Contract



For course/conference over £150 Education and Development Funding

Name of Employee		
Job Title		
Division		
Course Details		
Course/Conference Title		
Start Date		
Costs – detailed breakdow	/n	
Course/Conference Fee		£
Flights/Ferry		£
Other transport costs		£
Accommodation (B&B)		£
Other Costs		£
Grant or Self-funding		£
Total cost of the course/co	onference	£

AGREEMENT between Family Nursing & Home Care of the one part (Hereinafter referred to as "FNHC") AND of the other part (hereinafter referred to as "the employee")

I have read and understood the following conditions which apply to the above mentioned course/conference.

- 1 FNHC will pay the full course/conference costs in full before the course/conference starts.
- 2 I agree that if I:
 - 2.1 withdraw from the course before the completion date, or fail to successfully complete the course I will repay 100% of ALL costs (travel, accommodation, full course/conference fees, staff replacement costs) unless there are extenuating circumstances, in which case the SMTs discretion will be necessary.
 - 2.2 resign from FNHC within ONE year of successfully completing the course/conference a 100% refund of ALL costs (travel, accommodation, full course/conference fees, staff replacement costs) will be recouped.
 - 2.3 leave FNHC within TWO years of completion of the course/conference a 50% refund of ALL costs (travel, accommodation, full course/conference fees, staff replacement costs) will be recouped.
- 3 I agree that should either 2.1, 2.2, or 2.3 be invoked, the repayment will either be in one payment to cover all costs and taken directly out of my salary OR a payment plan will be set up to take the money to be repaid directly out of my salary.
- 4 I agree to my Manager or the Education and Development Lead asking for progress reports relating to this course from the training provider.
- 5 I agree to furnish the Manager on demand at reasonable intervals any information or documentation necessary to ascertain the Employee's progress with the said course.

Employee Signature	Date
Operational Lead Signature	Date

One completed copy for Education & Development & one completed copy for employee.

Electronic copies will be provided to Finance and HR by Education & Development.

Education & Development fully funded contract 2020 Blank

14 October 2020

Appendix 8: Education and Development Contract Over £150 80:20 basis

EDUCATION AND DEVELOPMENT CONTRACT Over £150 - costs on an 80:20 basis



For course/conference over £150 **Education and Development Funding**

Name of Employee		
Job Title		
Division		
Course Details		
Course/Conference Title		
Start Date		
Costs – detailed breakdown	n shown overleaf	
Course/Conference Fee		£
Flights/Ferry		£
Other transport costs		£
Accommodation (B&B)		£
Other Costs		£
Grant or Self-funding		£
Cost to Staff member (20% of	course fees)	£
Cost to FNHC (80% of course	fees)	£
Total Cost of the course/confe	erence	£
		part (Hereinafter referred to as "FNHC") AND
I have read and understood the folk FNHC will pay the full course FNHC 20% of the course/col I agree to pay the 20% of the in full on a payment plan as: I agree that if I 3.1 withdraw from the course/courstances, in which course in full (travel, according from FNHC within TW accommodation, full col I agree that should either 3.1, taken directly out of my salary I agree to my Manager or the I training provider. I agree to furnish the Manager the Employee's progress with	the other part (hereinafter referred to as "the owing conditions which apply to the above mere/conference costs in full before the course/conference fee if it is over the £150 threshold. The conference/course fees either OR agreed with my divisional manager and the finese before the completion date, or fail to success mmodation, full course/conference fees, staff nease the SMTs discretion will be necessary. In ONE year of successfully completing the confull course/conference fees, staff replacement costs; 3.2, or 3.3 be invoked, the repayment will eithe OR a payment plan will be set up to take the reducation and Development Lead asking for put on demand at reasonable intervals any inform the said course.	interence course/conference. Inference starts, and I agree to reimburse to ance manager Instally complete the course I will repay 100% of replacement costs) unless there are extenuating urse/conference a 100% refund of ALL costs at costs) will be recouped. In a 50% refund of ALL costs (travel, and in one payment to cover all costs and money to be repaid directly out of my salary, regress reports relating to this course from the mation or documentation necessary to ascertain
I have read and understood the folk FNHC will pay the full course FNHC 20% of the course/col I agree to pay the 20% of the in full on a payment plan as: I agree that if I 3.1 withdraw from the course/courstances, in which course in full (travel, according from FNHC within TW accommodation, full col I agree that should either 3.1, taken directly out of my salary I agree to my Manager or the I training provider. I agree to furnish the Manager the Employee's progress with	the other part (hereinafter referred to as "the owing conditions which apply to the above mere/conference costs in full before the course/conference fee if it is over the £150 threshold. The conference/course fees either OR agreed with my divisional manager and the finds as before the completion date, or fail to success mmodation, full course/conference fees, staff in case the SMTs discretion will be necessary. In ONE year of successfully completing the course/conference fees, staff replacement of years of completion of the course/conference fees, staff replacement costs; 3.2, or 3.3 be invoked, the repayment will either OR a payment plan will be set up to take the reducation and Development Lead asking for per on demand at reasonable intervals any informatical course.	interence course/conference. Inference starts, and I agree to reimburse to ance manager Instally complete the course I will repay 100% of replacement costs) unless there are extenuating urse/conference a 100% refund of ALL costs at costs) will be recouped. In a 50% refund of ALL costs (travel, and in one payment to cover all costs and money to be repaid directly out of my salary, regress reports relating to this course from the mation or documentation necessary to ascertain
I have read and understood the folk FNHC will pay the full course FNHC 20% of the course/course for full in full on a payment plan as: I agree that if I 3.1 withdraw from the course/coursetances, in which accommodation 3.2 resign from FNHC within TW accommodation, full course for fur full course for full course for full full full full full full full ful	the other part (hereinafter referred to as "the owing conditions which apply to the above mere/conference costs in full before the course/conference fee if it is over the £150 threshold. The conference/course fees either OR agreed with my divisional manager and the finese before the completion date, or fail to success mmodation, full course/conference fees, staff nease the SMTs discretion will be necessary. In ONE year of successfully completing the confull course/conference fees, staff replacement costs; 3.2, or 3.3 be invoked, the repayment will eithe OR a payment plan will be set up to take the reducation and Development Lead asking for put on demand at reasonable intervals any inform the said course.	interence course/conference. Inference starts, and I agree to reimburse to ance manager Institute the course I will repay 100% of replacement costs) unless there are extenuating urse/conference a 100% refund of ALL costs at costs) will be recouped. In a 50% refund of ALL costs (travel, and in one payment to cover all costs and money to be repaid directly out of my salary. In a course from the ination or documentation necessary to ascertain Date
I have read and understood the folk FNHC will pay the full course FNHC 20% of the course/cot I agree to pay the 20% of the in full on a payment plan as: I agree that if I 3.1 withdraw from the cour ALL costs (travel, according circumstances, in which are supported in full cot and the course of the course	the other part (hereinafter referred to as "the owing conditions which apply to the above mere/conference costs in full before the course/conference fee if it is over the £150 threshold. The conference/course fees either OR agreed with my divisional manager and the finese before the completion date, or fail to success mmodation, full course/conference fees, staff in case the SMTs discretion will be necessary. In ONE year of successfully completing the course/conference fees, staff replacement of years of completion of the course/conference unse/conference fees, staff replacement costs; 3.2, or 3.3 be invoked, the repayment will eithe OR a payment plan will be set up to take the reducation and Development Lead asking for put on demand at reasonable intervals any inform the said course.	interest of the employee") Intioned course/conference. Inference starts, and I agree to reimburse to Interest of the course I will repay 100% of replacement costs) unless there are extenuating surse/conference a 100% refund of ALL costs in costs) will be recouped. In a 50% refund of ALL costs (travel, it) will be recouped. In the recouped of the repaid directly out of my salary, regress reports relating to this course from the mation or documentation necessary to ascertain Date Date
I have read and understood the folk 1 FNHC will pay the full course FNHC 20% of the course/coi 2 I agree to pay the 20% of the in full on a payment plan as: 3 I agree that if I 3.1 withdraw from the cour ALL costs (travel, accorizumstances, in which (travel, accommodation 3.2 resign from FNHC within (travel, accommodation, full coil agree that should either 3.1, taken directly out of my salary I agree to my Manager or the I training provider. 6 I agree to furnish the Manager the Employee's progress with Employee Signature Operational Lead Signature One completed copy for Education	the other part (hereinafter referred to as "ti owing conditions which apply to the above mer e/conference costs in full before the course/conference fee if it is over the £150 threshold. e conference/course fees either OR agreed with my divisional manager and the fin se before the completion date, or fail to succes mmodation, full course/conference fees, staff in case the SMTs discretion will be necessary. in ONE year of successfully completing the coin, full course/conference fees, staff replacement O years of completion of the course/conference urse/conference fees, staff replacement costs) 3.2, or 3.3 be invoked, the repayment will eithe OR a payment plan will be set up to take the re Education and Development Lead asking for p or on demand at reasonable intervals any inform the said course.	interence starts, and I agree to reimburse to ance manager ance manager asfully complete the course I will repay 100% of replacement costs) unless there are extenuating curse/conference a 100% refund of ALL costs at costs) will be recouped. as 50% refund of ALL costs (travel, will be recouped. are be in one payment to cover all costs and money to be repaid directly out of my salary. are reports relating to this course from the mation or documentation necessary to ascertain Date Date are employee.

14 October 2020

Application for Funding for Training & Development

Private and Confidential

Name Role Team

Date

Dear

Yours sincerely

Justine Le Bon Bell

Education & Development Lead

Appendix 9: Application for funding letter approved

	YES / NO	Action Required/ comment	
QAGP Approval			
Funding agreed – details			
Flights, travel, accommodation, etc agreed – details			
Time to attend study sessions agreed - details			
Protected study time agreed - details			
Other Comments			

Development Department at the Gervaise le Gros Centre and retain one for your own records.

Your application for funding for...... has been presented to and considered by the Quality,

Appendix 10: Application for funding letter unsuccessful

Private and Confid	Circiai		
Name			
Role			
Team			
Date			
Dear			
A			
Application for Fur	nding for Trainii	ng & Development	
Your application fo	r funding for Team. After		
Your application fo and Performance	r funding for Team. After		
Your application fo and Performance	r funding for Team. After e reasons detail		
Your application fo and Performance unsuccessful for th	r funding for Team. After e reasons detail		
Your application fo and Performance unsuccessful for th	r funding for Team. After e reasons detail		

Yours sincerely

appointment.

Justine Le Bon Bell Education & Development Lead

Appendix 11: Application for funded courses check list Education and Development Application for Funded Courses Check list

Luucation and Develo	pinent Application for Funde	u courses che	CK IISt	
Name:				
Job Title:				
Department:				
Operational Lead:				
Title of Couse/conference/study:				
Date of Course/conference/study:				
Check list	Comments / Action Required	By Whom	Timescale	

Check list	Comments / Action Required	By Whom	Timescale	√
Over £150 form been completed and signed by the applicant and the operational lead				
Mandatory training is up-to-date or places booked on future courses.				
Relevant information about course/conference/study attached to application				
Funding has been approved by Governance Approval Group				
Funding approved outside of approval group, email provided by Senior Management confirming this				
Approval letter sent out with contract				
Contract signed and returned to EDT				
Copies of contract for EDT, individual, HR and finance				
Purchase Order processed for invoices				
Course / conference / study booked and final costings detailed				
Travel and accommodation booked and costs finalised and detailed				
For courses / events facilitated by F	NHC			
Venue confirmed				
Speaker confirmed				
Speaker / Event requirements detailed and confirmed				
Catering requirements detailed and confirmed				

Appendix 12: Education and Development Event Planning Check list

Education and Development Event Planning Check list

Name:	
Department:	
Operational Lead:	
Type of Event:	
Title of Event:	
Venue:	
Date of Event:	

Check list	Comments / Action Required	By Whom	Timescale	V
Target Audience				
Delegate rates				
Themes				
Outline				
Flyers / Posters				
Brochures / Leaflets				
Equipment / resources				
Speakers				
Workshops				
Stands				
Sponsorship				
Room / Venue Hire				
Catering				
Accommodation				
Flights				
Schedule				
Other				
Summary of Expenditure		Cost	Total	
Venue / Room Hire				
Catering				
Equipment / resources				
Printing				
Speakers				
Accommodation				
Flights				
Summary of Income		Cost	Total	
Sponsorship				
Delegate rates				

Other Funding		