



## External Learning and Development Events: Policy and Procedure

DOCUMENT CONTROL	
<b>Owner:</b>	Director of HR Business Services
<b>Document Control:</b>	HR Business Support
<b>Date Live From:</b>	October 2017
<b>Review/Approval Group:</b>	Partnership Policy Review Group/Area Partnership Forum
<b>Last Reviewed:</b>	March 2017
<b>Review Due/Cycle:</b>	Every 2 years

## 1. Aims

1.1 The aims of the External Learning & Development Policy are:

- To provide staff with a process for applying to attend external learning and development activities.
- To give managers direction on how to engage with the Learning & Professional Education team to progress applications.
- To support the use of appropriate Learning & Professional Education budget to maximise the benefits to NHS 24.

1.2 NHS 24 aims to create an environment, which will allow all staff members to utilise their skills and experience, and thereby encourage a well-motivated and committed workforce, with a focus on quality and teamwork. NHS 24 value the contribution made by staff, and will treat all staff with dignity, respect, care and compassion, as an open and accountable organisation.

## 2. Introduction

2.1. NHS 24 is committed to investing in the education, training and ongoing development of all staff.

2.2. This policy applies to all NHS 24 staff and has been developed based on the principles of equity of access and opportunity to learning and development for all NHS 24 staff. It demonstrates NHS 24's commitment to the development of staff, through providing funding support and/or allowing time off for activities that are educational or developmental and which lead to the acquisition of skills or knowledge relevant to a staff member's current role. Selected activities should have specific and direct relevance to the individual's KSF outline and agreed goals as documented in their Personal Development Plan, and in equivalent documentation for non-Agenda For Change conditions staff. NHS 24 is also committed to supporting staff to develop their careers within the NHS.

2.3. This policy supports activities, which may include short courses, conferences or other educational events, which are considered essential or desirable for a staff member's role. This policy is one means by which NHS 24 provides commitment to the development of staffs' current and future potential within their job role, through a structured approach and process.

2.4. All applications to attend external learning and development events shall be considered by the appropriate Line Manager/Senior Manager ('Development Lead') as part of overall Directorate Learning and Development priorities and therefore may only be approved after taking into

account the relevance of the activity, service demands and budgetary commitments. Where the application is approved by Line Manager/Senior Manager ('Development Lead'), an agreement on funding to cover costs of attendance and/or and time away from work will normally be supported.

2.5. This policy is one means by which staff member development is supported and funded in NHS 24. There are alternative options for staff member development including, but not restricted to, involvement in organisational projects; participation in coaching or mentoring; internal classroom training activities; eLearning; further and higher education courses.

2.6. Other relevant policies include the Bursary Award Scheme Policy, which considers funding support for accredited programmes of study and the IPM/PDP Policy, which underpins the individual performance management, objective setting and personal development planning processes for managers and staff. Further details on this policy can be found on the NHS 24 intranet under HR/Policies, Guidelines and Forms.

### 3. Scope

3.1. For ease of understanding, all authorised support for education or development purposes will fall into one of 3 categories: Time Off and Funding, Time Off only or Funding Only

3.1.1. **Time Off and Funding:** There may be instances where it is appropriate for a manager to support both time off and funding to support development activities (subject to meeting criteria detailed in section 3) such as short training courses/events, conferences and seminars.

3.1.2. **Time Off only:** There may be instances where it is appropriate for a manager to approve time off only to support an individual in attending a development event, or in order to support studies (e.g. in the case of courses supported through Bursary Award Scheme funding).

3.1.3. **Funding Only:** There may be instances when funding only applications are approved which require no paid time from work but are appropriate for financial support. In this case the approval will clarify the terms on which funding only will apply.

3.2 In all of the above cases, any decision on appropriate support will arise from manager and staff member discussions about suitable Personal Development Plan (PDP) aims for the individual to support their role requirements.

#### **4. Funding Support for External Development Events**

- 4.1. The Learning and Development budget is held centrally within Human Resources. However, through regular discussion with nominated Senior Managers within each Directorate ('Development Leads'), the Learning and Professional Education team will coordinate the planning and distribution of funding to support organisational priorities.
- 4.2. Nominated Senior Managers for each Directorate will meet quarterly with a representative of the Learning and Professional Education team to discuss learning needs for their functions for the quarter ahead. For all supported activities, the Senior Manager will be asked to identify clear objectives to allow monitoring and evaluation of development. This information will be used to support relevant Return on Investment reporting. The Directorate learning priorities should then inform the discussion of approvals for individual applications.
- 4.3. Where it is agreed that a development activity request is aligned to the Directorate development priorities, and has received the required line manager support, the Learning and Professional Education team will coordinate the booking of the requested external development activities.
- 4.4. Although individual staff members and line managers may request specific development events, the Learning and Professional Education team will hold a corporate responsibility for ensuring value for money in sourcing appropriate development solutions, which may mean recommending alternative solutions, based on overall cost, previous evaluation of activities by external providers, and in line with organisational procurement arrangements.
- 4.5. In addition to assessment of value for money activity selection, the Learning & Professional Education team will also monitor the number of applications at specific events and may need to apply limits on attendance based on organisational spending priorities. In all approved attendances, NHS 24 delegates will be expected to cascade knowledge to colleagues in order to maximise the value of the development support.

#### **5. Individual Staff Member Support Criteria and Authorisation**

- 5.1. For all External Development applications, the Learning and Professional Education team will be responsible for checking that corporate governance and standing financial instructions are met and will liaise with Directorate leads as required to ensure that the application meets the Directorate development priorities.

5.2. For approved External Development applications that incur fees in excess of £500, a full business case must also be submitted by the line manager and supported by the nominated Senior Manager ('Development Lead') and/or Director. The business case must be approved by Deputy Director of Human Resources prior to the booking of the activity.

## **6. Additional Support**

6.1 It is recognised that staff members with a disability may require additional support in order to attend events. Any additional requirements should be discussed with the event provider and in most cases should be met by them, however in cases where they are unable to meet identified requirements, reasonable requests for additional support will be considered by NHS 24.

## **7. Expenses**

7.1. Any travel or accommodation requirements must be approved and funded by the Line Manager in line with NHS 24 Expenses Policy. Please refer to NHS 24's Expenses policy for further information.

## **8. Application Process**

8.1. Staff members should complete and submit an External Events Form no less than 14 days before the event. Sufficient notice is required in order to comply with the purchase order process including, where required, the setting up of new suppliers on the purchase order processing system. The form can be found on NHS 24's intranet site under Human Resources, Policies, Guidelines and Forms, in Forms – Learning and Development forms.

8.2. All relevant course details, including cost and relevance of course, should be entered into the form. The Senior Manager ('Development Lead') responsible for coordinating Development Requests for the Directorate must approve the request and forward on to the Learning and Professional Education function, as detailed on the form.

8.3. The Learning and Development Administrator will process the booking, taking account of any requirements detailed on the form, and raise a purchase order. All invoices must have a corresponding Purchase Order and therefore it is imperative that sufficient notice is allowed to process the form (please refer to 8.1).

8.4. The Learning and Development Administrator will confirm with the delegate and their line manager that the form has been processed, and appropriate booking details will be sent.

8.5. After the event, the Learning and Development Administrator will contact the staff member to confirm their attendance, and this will be logged appropriately in the corporate Learning Management System.

## 9. Evaluation

9.1. NHS 24 is keen that all learning is appropriately evaluated, and staff members will be required to complete a short evaluation of any learning events that they have attended. The purpose of this is to highlight key benefits and knowledge gained and to provide any further useful information. All staff members are required to evaluate learning events as part of the **NHS 24 Learner Contract** (Appendix 1).

9.2. The Learning and Professional Education Department report regularly to Executive Directors and Senior Manager Development Leads on the effectiveness of educational activities.

## 10. Non Attendance at Courses

10.1. It is recognised that there may be cases where staff members are unable to attend or complete the learning event. In this event, the candidate must notify the Learning and Professional Education Department as soon as possible in order that an alternative candidate or cancellation can be arranged.

10.2. The staff member may be asked to repay NHS 24 in part or in full for the course or conference fees, if a refund is not possible. Each case of an incomplete or failed course will be dealt with on a person centred basis.

## 11. KSF and Personal Development Plans

11.1. In accordance with Agenda for Change Knowledge and Skills Framework (KSF) there will be occasions where staff will request external learning and development events to support their knowledge and skills development that they themselves have identified.

11.2. Where this is the case, the staff member should in the first instance have a discussion with their line manager around the agreement of objectives and the skills or knowledge development requirement before documenting this information within their Personal Development Plan.

11.3. Thereafter, the request for external learning and development events should be followed as per instructions detailed earlier in the policy.

## **12. Declined Requests**

12.1 Staff members who feel that a reasonable request to attend an external learning and development event has been declined may request a formal review. This request should be made to the Deputy Director of Human Resources who will arrange for a senior manager to review the paper work.

## **13. Review**

13.1 This policy will be reviewed in Partnership on a 2-yearly basis.

## **14. Equal Opportunities**

14.1 The Policy will be impact-assessed and monitored for its effects in terms of equality and diversity.

## APPENDIX 1

### LEARNER CONTRACT

NHS 24 is committed to investment in the education, training and ongoing development of all staff in line with NHS Scotland Staff Governance standards, and in particular to the KSF requirements of their role(s).

The Learning and Professional Education Department is committed to supporting the development of staff members by:

- providing professional advice on learning and development matters
- offering access to a range of learning activities
- helping to ensure accurate recording of your learning and development activities in NHS 24

As NHS 24 staff members benefiting from Learning and Development, we expect you to:

- adhere to NHS 24's learning and development policies and processes
- attend/complete identified training, and let us know as soon as possible if you are unable to attend
- evaluate activities you have participated in, in order that these can be improved and others may continue to benefit from them
- be prepared to cascade the knowledge gained to other staff members within NHS 24

This is the NHS 24 Learner Contract, and applies to all learning and development activities you undertake within NHS 24.



APPENDIX 2

## PROCESS FLOW FOR ATTENDING EXTERNAL EVENT

