

NSS Development, Training and Education Policy



Date Published: June 2019
Version: V1.5
Owner/Author: Employee Relations and Rewards

DOCUMENT CONTROL SHEET

Key Information:

Title:	<i>Development, Training and Education Policy</i>
Date Published/Issued:	June 2019
Date Effective From:	June 2019
Version/Issue Number:	V1.5
Document Type:	Policy
Document status:	<i>Final</i>
Author:	Employee Relations and Reward
Owner:	HR
Approver:	NSS Staff Governance Committee
Approved by and Date:	Chair of Staff Governance Committee May 2019
Contact:	ERR Team
File Location:	HRBCS

Revision History:

Version:	Date:	Summary of Changes:
V. 1.0	November 2017	Creation of standalone policy, previously used as an Appendix to Personal Development Planning and Review Policy reviewed 2016.
V.1.2	March 2018	Policy Review
V.1.3	May 2018	Amendments following consultation with Learning & Development team
V.1.4	September 2018	Amendments following organisation wide consultation from 19 th July- 9 th August 2018.
V1.5	December 2018	Amendments to reflect working hours of Modern Apprentices following discussion at WPTC meeting
	May 2019	Policy sign off

<u>Contents</u>	<u>Page Number</u>
1 Introduction	2
2 General Principles	2
3 Applications for Further Education Programmes	2
4 Employee Financial Reimbursement Packages	3
5 Other Programme Applications	3
6 Unsupported Applications	4
7 Useful Information	4
8 Policy Review	5
Appendix A	6
Application Procedure	7-9
Appendix B	10
Application for Financial Re-imbusement and Study/Exam Leave	10
Appendix C	11
NSS Statement of Commitment and Reimbursement of Further Education Fees	11
Appendix D	12
Authorisation of Deduction from Salary	12
Appendix E	13
Development, Training and Education Policy- Maximum Levels of Entitlement	13
Appendix F	13
Responsibility Matrix	13

1. Introduction

This policy will support all staff when learning or studying for relevant further education, professional qualifications, attending developmental conferences or study days, or undertaking education and training linked to personal development plans.

The purpose of this policy is to support and guide individuals within the organisation who make decisions about Development, Training and Education.

The aim of the NSS Development, Training and Education Policy is to cultivate the employment potential of all NSS employees. The priorities for all Development, Training and Education will be guided by the organisation's objectives and outcomes outlined in:

- The annual review of the Strategic Business Unit Business Plan
- Operational HR Strategies
- The annual review of the Corporate Contract and the NSS HR Strategy.

NSS is also committed to participating in appropriate national employment and development initiatives

Should members of staff have any difficulties with understanding any aspect of this policy, or require further information in respect of accessibility, interpretation or application of the policy, they should contact HR, their Line Manager or Staff side Representative.

2. General Principles

- Development encourages the employee to open up their individual potential and helps prepare the employee for responsibilities and career opportunities within NSS/NHS.
- All applicants for further education must be aware of the demands of the course and should be prepared to commit the effort and private study time required for the completion of the course.
- Approval for support to undertake studies during employment will be considered based on the relevance to the employee's present job, existing PDP's and their future career plans in agreement with the relevant line manager. Applications made within the first 12 months of employment are unlikely to be supported, unless an exceptional case is made and supported by Line Manager stating why the development is essential.
- All applications must be made and approved prior to the course start date, for details on timeframes see Appendix A.

3. Applications for Further Education Programmes

- 3.1 Employees who want to apply for Day Release, Study or Exam Leave, or Financial Reimbursements for attendance at Further Education Programmes must make an application (see Appendix B) stating specific benefits/objectives/relevance of the further education to the employee's present job and/or future development within NSS/NHS.
- 3.2 All applications must go through a SBU agreed approval process to ensure consistency, equity and fairness across the SBU and NSS; see Appendix A for Application Procedure. The employee should be advised of the outcome and further arrangements.
- 3.3 Approval for Day and Block Release will be at the discretion of the SBU Director, or SBU agreed

authority, and subject to operational priorities.

- 3.4 Approval for Study Leave where an employee is already on day or block release will not normally be granted.
- 3.5 Approval for Study Leave for employees who are not already attending day or block Release may be granted for up to 5 days leave in total at the discretion of the SBU Director. Leave should be taken over the academic year.
- 3.6 Approval for Exam Leave will be at the discretion of the SBU Director, or SBU agreed authority, and consideration given to the duration of the exam and the employee's travelling time needs.

4. Employee Financial Reimbursement Packages

- 4.1 Development, Training and Educational needs will be met on a prioritised basis. A limited number Employee Financial Assistance packages may be available where a SBU Director has approved that a Further or Higher Education programme, Open Learning programme, or National/Scottish Vocational Qualification programme is wholly relevant to the employee's job/role and will benefit their future career in NSS/NHS.
- 4.2 Where NSS agrees to pay a percentage of the fees and costs, a mutual agreement should be reached with the employee about the procedures and options for repaying monies back to NSS.

The options are:

- That NSS will pay the employee's share up front providing the employee signs a payroll mandate for schedule of deductions from their salary.
 - That the employee pays their share up front directly to the Further Education College/ University or learning provider, while the outstanding balance is invoiced to the NSS
- 4.3 Arrangements for any reimbursements to the employee for books, etc should also be locally agreed (See Appendix A). Normally, an employee who is granted financial assistance for a further/higher vocational/educational programme is required to sign an agreement stating that in the event that she/he leave NSS/NHS employment while receiving financial assistance, she/he will be required to reimburse NSS.
 - 4.4 i) If the employee leaves NSS/NHS within 2 years after the completion of a further or higher vocational or educational programme, the requirement to reimburse NSS/NHS are as shown below:
 - Between 6-12 months after completing a programme they will be asked to reimburse up to 75% of the fee assistance;
 - Between 12-18 months it will be up to 50%;
 - Between 18-24 months it will be up to 25%.
 - ii) NSS will not require the repayment of financial assistance where an employee is required to leave the organisation on an involuntary basis arising for example through redundancy or ill-health.
 - 4.5 Appendix B outlines the level of assistance given to each of the categories of employees. Senior Managers will fall within the same parameters as these Grades.

5. Other Programme Applications

5.1 Applications for Open University Programmes

Where the programme is not already part of an NSS, or SBU HR Strategy, the procedure for making an application and approval are the same as for Further Education Programmes.

5.2 Applications for Scottish or National Vocational Qualifications

Where the programme is not already part of an NSS, or SBU HR Strategy, the procedure for making an application and approval are the same as for Further Education Programmes.

5.3 Applications for First Degree Courses

It is not normal policy to support employees undertaking a full time first degree course, but where an application is strongly supported by a Director the procedure for making an application and approval are the same as for Further Education Programmes.

Applications for part time first degree courses will be considered on an individual basis.

5.4 Applications for Part-Time/Distance Learning Postgraduate Courses

The guidelines outlined at Appendix B can be applied by SBU Directors, and each case should be considered on its individual merits. When considering these courses, the costs incurred and the expected benefits need to be carefully analysed, particularly as the high costs of courses such as MBAs are likely to impact upon the availability of funds for other staff development.

6. Unsupported Applications and Right to Appeal

6.1

Where an application for further education is deemed not to be directly relevant to the employee's current job or likely career path in NSS/NHS, the SBU should:

6.1.1 Encourage the employee to discuss alternative further education courses with their Line Manager (where an unsupported application was not due, wholly or in part, to lack of funds).

6.1.2 Consider the application on its merits for partial support eg: the employee could pay the cost of the course, but the SBU would grant study leave.

If a member of staff is refused access to learning, education or training study support and feels that he/she is being unfairly treated, then this should be taken up with their Line Manager in the first instance.

7. Working Hours

NSS has a duty to both comply with working hours regulations and also to protect the health and wellbeing of its staff. Managers must be aware that time spent at a training course/event or attending a higher/further education course would be considered 'working time' for the purpose of the regulations. Additionally, travel time (in excess of normal daily commuting time) would also be considered as

'working time'.

Please refer to the NSS Working Time Regulations – Guidelines for further information. Particular attention should be paid to the working hours of 'Young Workers' (those aged under 18 years of age) as there are more restrictions relating to their working hours. These individuals should:

- Not work for more than 8 hours per day/40 hours per week
- Receive a daily rest period of at least 12 hours
- Have a weekly rest period of at least 48 hours

Where a 'Young Worker' must work in excess of the 8 hours daily maximum due to attending a training/education course or event, then compensatory rest should be provided – ideally during the next working day.

Where at all possible, consideration should be given to the location of such training and travel arrangements in order to minimise the impact on working hours, especially in the case of 'young workers'.

8. Useful Information

Other policies/guidance that you may find useful include:

- NSS Personal Development Planning and Review Policy
- NSS Equal Opportunities Policy
- NSS Induction Policy
- NSS Employee Data Handling within Human Resources Guidance Document
- Personal Development Planning & Review PIN Policy May 2011
- NSS Corporate Learning Plan
- NSS Checking Professional Registrations Policy

The following websites may also be of interest:

- [geNSS NSS Values page](#)
- [geNSS Healthcare Support Workers page](#)
- Staff Governance - www.staffgovernance.scot.nhs.uk
- [NHS Scotland Dignity at Work Toolkit](#)
- [geNSS KSF page](#)
- Department for Business Innovation and Skills – www.bis.gov.uk
- ACAS – www.acas.org.uk

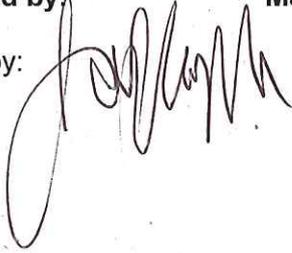
9. POLICY REVIEW

This policy will be reviewed two years from its effective date to ensure that arrangements put in place are appropriate to the operating requirements of National Services Scotland (NSS).

Date Policy is effective: May 2019

Reviewed by: May 2021

Agreed by:

A handwritten signature in black ink, appearing to be 'J. A. B.', written over the 'Agreed by:' label.

Date:

24.6.19

Appendix A- Application Procedure

The employee must submit an application in the first instance to their line manager for discussion prior to further consideration by the SMT of the SBU.

Each application must contain the following documentation:

- Application Form confirming cost and full course details.

All applications **must** be countersigned by the relevant Line Manager. The Line Manager must ensure that all applications with the NSS Development, Training and Education Policy and that all employees have read and understood the policy and NSS Statement of Commitment and Reimbursement of further education fees (Appendix C) that they will be required to sign if their application is successful.

All forms should be checked by the Line Manager to ensure that they have been completed in full. Line Managers should ensure before supporting the application that the course must be relevant to job role and organisational needs.

Applicants should be aware of the following:

- Incomplete applications will not be processed and will be returned until all the relevant information is supplied.
- The specific course costs must be included.
- All applications must be made and have been approved prior to registering for a course.
- A **minimum of 8 weeks'** must be allowed from the date of application for all the documentation to be processed and approved prior to the course start date (Less time may be given in exceptional circumstances).
- Retrospective applications will not be accepted.

Each application will be considered by the SBU Director/ SMT and they will communicate their decision to line manager directly.

If an application is successful and the employee has been granted study leave/financial reimbursement;

- Those employees will be issued with a Letter of Commitment and Reimbursement of Fees agreement (Appendix B).
- Employees will be responsible for payment of the balance of any fees not paid by NSS.
- Employees are responsible for their enrolment on the course of study.
- Employees should keep their manager up to date with their progress and ensure that all PDP's are updated.
- Copies of all agreed applications for continuing education will be retained on personal electronic records.
- A copy of the 'Authorisation for deduction from Salary' (Appendix D) should be provided to payroll for processing.
- Employees must submit a new application for each year of study.

Appendix B - Application for Financial Re-imbursement and Study/Exam Leave

1)	Personal Details		
	Employee Name:	Job Title/Band or Grade:	
	Department	Line Manager:	
	Date of Request:		
2)	Current Qualification and/or Further Education Information;		
	Has NSS or any other part of NHS previously funded a Formal Education application?	Yes	No
	If yes, for academic years?		
	Duration?		
	Total cost?		
	Course Title(s)?		
3)	Course Details		
	<input type="checkbox"/> Application for new programme	<input type="checkbox"/> Application for continuing programme	
	Title of Course;		
	Duration of course;	Start Date;	
	Final Qualification Expected:		
	Name of Education Provider;		
	Address of Education Provider;		
	Mode of Delivery e.g. online, distance learning, part time;		
4)	Fees and Costs	Full £ Costs	Supported £ Costs
	Cost of Entire Course	£	£
	Registration Course Fees	£	£

	Current year Tuition Fees	£	£
	Current year Exam Fees	£	£
	Current year Textbook Fees	£	£
	Excess Travel Costs	£	£
	Accommodation costs	£	£
	TOTAL		
5)	Required/Likely Leave Dates/Timescales:		
	Learning days requirements (e.g. number/timing of day release, work-based project time)		
	Study Leave:		
	Exam Leave:		
6)	Description of benefits and relevance to the individual and NSS's/SBU's business objectives, how identified (eg review meeting, etc), any work-based support needed eg project work, Line Manager support, and whether the qualification will lead to any professional membership. Please attach a separate sheet ensuring it is signed and dated by the employee and the Line Manager.		
7)	As of this date, I agree to repay a percentage of any financial assistance received from NSS, in accordance with the NSS Development, Training and Education Policy, if I leave my employment within two years of completion of the course.		
	Applicant Signature:	Date:	
8)	Declaration of support (for completion by Line Manager)		
	Are you in support of this application? Yes <input type="checkbox"/> No <input type="checkbox"/>		
	If yes, how does this application meet the training and development needs of the individual and the organisational need for this training/qualification?		

	If no, please give the reasons why you do not support this application?		
	Line Manager Signature:	Date:	
9)	Approval		
	Director/Authorised Approval:	<input type="checkbox"/> Approved	<input type="checkbox"/> Not Approved
	Signed:		
	Date:		
	Director/Authorised Approvers Comment:		

Please submit a hard or scanned copy of the completed authorised form to the HR

Service Centre at:

Area 23, Ground Floor

NHS National Services Scotland

Gyle Square

South Gyle Crescent

EDINBURGH

EH12 9EB

T: 0131 275 7700

or use [Contact Us](#) on HR Connect

Appendix C- NSS STATEMENT OF COMMITMENT AND REIMBURSEMENT OF FURTHER EDUCATION FEES AGREEMENT

Name:

Course:

Contract of Commitment

Date of Issue:

I undertake to remain in the employment of the NHS National Services Scotland whilst on the course if I leave the employment of the agency before the end of the course I will refund the full amount. In the event of my resignation from NHS National Services Scotland within the 2-year period the SBU is, at the discretion of the Management, entitled to ask me to repay, on a whole or proportional basis, any expenditure incurred by NHS National Services Scotland in connection with my attendance on this course. I agree to this, and agree that this amount should be deducted from my final salary.

Total Cost of: £

Employer to pay 75% total cost:	Employee to pay 25% total cost:
£	£

Reimbursement of Fees

I XXXXXXXXXXXX agree to pay 25% of my Further Education Course Fees through the method attached on the separate sheet.

Deduct from Salary

This will be for a period of **(Amend as appropriate)**. The first payment will be **(Date)** and on the same date each month thereafter, with the last payment being made on the August 2018.

Signed:

Date:

Please submit a hard or scanned copy of the completed authorised form to the HR Service Centre at:

Area 23, Ground Floor

NHS National Services Scotland

Gyle Square

South Gyle Crescent

EDINBURGH

EH12 9EB

T: 0131 275 7700

Use Contact Us on HR Connect

Appendix D- Authorisation of Deduction from Salary

Employee's name:

Employee's number:

Academic Year:

Course title:

Repayments can be made in full or up to 12 monthly instalments per academic year. I hereby authorise NHS National Services Scotland (NHS NSS) to deduct all the amounts due from my salary in accordance with the following repayment schedule.

Month	Year	Amount	Month	Year	Amount
April		£	October		£
May		£	November		£
June		£	December		£
July		£	January		£
August		£	February		£
September		£	March		£

I undertake to remain in the employment of NHS National Services Scotland (NHS NSS) whilst on the course. If I leave the employment of NHS NSS before the end of the course I will refund the full amount paid by NHS NSS less any contribution already paid from my salary. In the event that I resign from NHS NSS within the 2-year period following qualification, the SBU is, at the discretion of the Management, entitled to ask me to repay, on a whole or proportional basis, any expenditure incurred by NHS NSS in connection with my attendance on this course. I agree to this and agree that this amount should be deducted from my final salary.

Signed

Date:

Appendix E- Development, Training and Education Policy- Maximum Levels of Entitlement

Category of Staff and Type of Course	Day/Block Release	Exam Fees Reimbursement Maximum	Reimbursement of Registration Course Fees, Excess Travel Maximum	Text Book Reimbursement Maximum	Maximum of Text Book	Exam Leave
		%	%	%		
All AfC Staff Band 3 and above	At discretion of the SBU Director or SBU agreed authority.	75	75	75	£40	Yes, at the discretion of the SBU Director or SBU agreed authority.
Allied Health Professionals	At discretion of the SBU Director or SBU agreed authority.	75	75	50	£40	Yes, at the discretion of the SBU Director or SBU agreed authority.
Trainee BMS	At discretion of the SBU Director or SBU	75	75 (100% if doing course required for	50	£40	Yes, at the discretion of the SBU Director

	agreed authority.		HCPC Registration)			or SBU agreed authority.
All AfC Staff Band 1 and 2	At discretion of the SBU Director or SBU agreed authority.	100	100	100	£40	Yes, at the discretion of the SBU Director or SBU agreed authority.
BMSs doing Fellowship of Institute of Biomedical Scientists course	At discretion of the SBU Director or SBU agreed authority.	75	100 fees 75 travel	75	£40	Yes, at the discretion of the SBU Director or SBU agreed authority.
/specialist training						
SM/EL Grade	At discretion of the SBU Director or SBU agreed authority.	75	75	75	£40	Yes, at the discretion of the SBU Director or SBU agreed authority.

Appendix F- Responsibility Matrix

Member of staff	Line Manager	SBU Director	Human Resources
<p><i>Actively identify and seek opportunities for learning and development, in line with their PDP and, as necessary, to maintain and develop their skills and professional development, to ensure that they can do their job safely and effectively and to maintain their professional registration where appropriate.</i></p> <p><i>Understand that if they should voluntarily leave NSS or be dismissed may they be required to refund all current financial assistance provided per NSS Policy.</i></p> <p><i>Alerting line manager at the earliest opportunity of any issues or concerns with regard to their course of study.</i></p> <p><i>To notify their Line Manager immediately of any decisions to discontinue the course. Consequent on any such decision a refund of all or some of the current financial assistance provided may be required.</i></p>	<p><i>Ensure they are aware of the process for applying for study leave/fee reimbursement and that the member of staff has fully read and understood the provisions of the policy and application procedure (Appendix A)</i></p> <p><i>Support staff with the application and ensure that all applications are complete prior to supporting the application for approval.</i></p> <p><i>Ensure all staff have a regular review discussion, in order to appraise past performance and identify any necessary learning and development opportunities. For staff employed under Agenda for Change conditions of service, these reviews fall within the scope of the Personal Development Planning and Review Policy.</i></p> <p><i>Discuss and agree the learning, education or training with staff member.</i></p>	<p><i>Ensure there is a workforce learning and development strategy in place which has been developed in partnership, includes mandatory training, reflects the outcomes of PDP discussions, and identifies actions for implementation, monitoring and evaluation. This strategy should be reviewed and updated regularly.</i></p> <p><i>Ensure all staff should have equity of access to training, irrespective of working arrangements or profession, and without discrimination on any other grounds</i></p> <p><i>Resources, including time and funding, are appropriately allocated to meet local training and development needs taking into account the current priorities of both the service and service users.</i></p>	<p><i>Ensure that all forms received have been signed and approved by the Line Manager and that the forms have been completed in line with the Policy.</i></p> <p><i>Ensure any applications, statements of commitment and authorisation of deduction from salary are kept on each individuals personal files.</i></p>