

Learning, Education and Training Policy: Process and Procedures

(Includes Internal, External, Further and Higher Education and Overseas Leave)

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Endorsing Body:	Human Resources Forum
Governance or Assurance Committee	Staff Governance Committee
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i) **CONSULTATION AND DISTRIBUTION RECORD**

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<p>Consultation Process / Stakeholders:</p>	<ul style="list-style-type: none"> • Head of Organisational Development • Senior Research & Development Manager • Learning and Development Manager • Senior Nurse Practice Education • Medical Education Manager • Business Support Manager
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<p>Consultation Process / Stakeholders:</p>	<ul style="list-style-type: none"> • Organisational Development • Human Resources • Organisational Development • Research and Development • UNISON Partnership • Joint Policy Forum
<p>Distribution:</p>	<ul style="list-style-type: none"> • NHS Lanarkshire Website

ii) **CHANGE RECORD**

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Date	Author	Change	Version No.
June 2016	Organisational Development Manager	<p>Policy refined to reduce duplication of wording relative to learning leave. Policy re-named for simplification.</p> <p>Corporate policies reviewed to ensure consistency.</p> <p>Structure of policy re-drafted with FAQ's.</p>	4
May 2018	Organisational Development Manager	<p>Policy updated to reflect the changes of the new GDPR statement added into section 3 and updated name of Data Protection Act</p>	4
Sept 2018	Organisational Development Manager Learning and Development Manager	<p>Policy updated to reflect changes for Corporate Policies publication</p> <p>Terminology change – ILA (individual learning account) to ITA (Individual training account)</p> <p>Internal and External study leave process change to reflect Oracle Learning Management (OLM) implementation and recording</p> <p>Additional information on recording and retention of Training Records</p>	5
October 2019	Head of Organisational Development Learning & Development Manager	<p>Updated to reflect the NHS Lanarkshire Quality Strategy, The Quality Approach to Achieving Excellence and the Learning Strategy 2018-2023 documents.</p> <p>Slight change to working in policy purpose and outcomes. (2)</p> <p>Slight change to wording in 5.1 combining bullet points</p> <p>5.2 additional point 'ensure staff have time to complete identified learning'</p> <p>Clarification of last point in 5.3</p> <p>5.4 reference to Staff Guidance relating to conduct between NHSL Staff & Pharmaceutical & Health Company Representatives.</p> <p>Update information on location of policies.</p>	6

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		<p>Reference to Staff Governance Standards 4th Edition 2012 Achieving Excellence March 2017 The Quality Approach to Achieving Excellence NHS Lanarkshire Quality Strategy 2018-2023</p> <p>Clarification and level of funding support available clearly defined for further & higher education (Fees) page 19</p> <p>Overseas leave process will require to be reviewed following the outcome of Brexit.</p>	
November 2021	Head of Organisational Development and Learning & Development Manager	<p>Updated to reflect the changes due to Brexit and leaving the European Union and national and local COVID Guidance</p> <p>Overseas Learning Leave pages 23 – 25. Changes to Definition and application Procedure</p>	

1. INTRODUCTION

The NHS Lanarkshire Quality Strategy, The Quality Approach to Achieving Excellence highlights the organisations commitment to ensuring staff are provided with the appropriate development, knowledge, skills and confidence to deliver high quality services.

NHS Lanarkshire recognises the importance of having a Learning, Education and Training policy that is clear, concise and free from all forms of discrimination. NHS Lanarkshire recognises the need to ensure that access to appropriate learning, education and training opportunities are available to support staff throughout their careers.

This is an important element of the organisation's commitment to equal opportunities and the following procedures aim to ensure fairness and equity in relation to all staff groups.

This policy and procedure is in line with the Learning Strategy 2018-2023 and the "appropriately trained" element of the Staff Governance Standard. To this end NHS Lanarkshire is committed to providing an environment that enables learning for all staff consistent with the needs of their role and focused on person centred, safe, effective and sustainable care.

2. AIM, PURPOSE AND OUTCOMES

The aim of this policy is to outline the process and procedures associated with learning, education and training activities, whether internally or externally provided, for NHS Lanarkshire staff. Internal provision includes significant on-the-job, work based training and the use of e-learning (i.e. learnPro / TURAS Learn).

The purpose of the policy is:

- Provide a procedural framework with guidance to line managers and staff.

OUTCOME(S):

- To provide a fair and equitable process across all staff groups accessing learning, education and training opportunities
- Evaluation of learning, education and training to ensure staff are provided with appropriate knowledge, skills and confidence to deliver high quality services.

3. SCOPE

3.1 Who is the Policy intended to Benefit or Affect?

- All staff employed by NHS Lanarkshire who apply for, participate in, deliver or approve learning, education and training activity
- Staff and managers employed by NHS Lanarkshire who provide guidance to their staff

3.2 Who are the Stakeholders

All staff employed by NHS Lanarkshire.

3.3 General Data Protection Regulation Statement

NHS Lanarkshire take care to ensure your personal information is only accessible to authorised people. Our staff have a legal and contractual duty to keep personal health information secure, and confidential. In order to find out more about current data protection legislation and how we process your information, please visit the Data Protection Notice on our website at www.nhslanarkshire.scot.nhs.uk or ask a member of staff for a copy of our Data Protection Notice.

4. PRINCIPAL CONTENT

Classification of Learning, Education and Training

For the purposes of this policy learning, education and training activity is classified as the following within NHS Lanarkshire:

- **Internal Learning** (See pages 12-13)
- **External Learning** (See pages 14-16)
- **Further and Higher Education** (See pages 17-20)
- **Overseas Learning** (See pages 21-27)

Further information of each type of learning is provided within the policy for clarity.

5. ROLES AND RESPONSIBILITIES

5.1 Organisation

- Provide a strategy which will support learning, education and training opportunities for all staff
- Ensure a framework is provided that allows group and individual learning, education and training needs to be identified
- Ensure learning, education and training opportunities are provided across the organisation
- Support personal development planning and review process within all areas of the organisation
- Training delivery developed in line with NHS Lanarkshire's Training Standards
- Evaluate all learning, education and training

5.2 Line Managers/Supervisors

- To comply with the Staff Governance Standard criteria all staff must be “appropriately trained” and “treated fairly and consistently”
- To adhere to the appropriate processes and guidance (including timescales)
- To ensure staff are aware of and complete all relevant learning supported in the NHS Lanarkshire Learning Plan
- To identify individual training needs
- To ensure staff are aware of the learning, education and training opportunities available to them
- Ensure staff have time to complete identified learning
- To co-operate in any evaluation of learning, education and training
- To inform learning, education and training providers of changes impacting participation i.e. non-attendance, withdrawing from course

5.3 Individual Members of Staff have a responsibility to:

- Read and understand the learning, education and training policy and adhere to the appropriate processes
- Ensure they are aware of and complete all relevant learning identified in the NHS Lanarkshire Learning Plan
- Take ownership of their own learning and development
- Participate in identifying learning, education and training needs
- Actively participate and attend learning, education and training activities
- Inform their line manager of any changes which may impact on participation in learning, education and training activities
- Co-operate in any evaluation of learning, education and training
- On completion of any external learning, education or development staff must update their personal training record within the Oracle Learning Management (OLM) system within Electronic Employee Support System (eESS)

5.4 Staff Guidance - Contact with Company Representatives

Before accepting an invitation to attend or speak at a meeting or event organised by a pharmaceutical / healthcare company, including meetings outside of normal working hours, all NHS Lanarkshire employees must discuss this with their line manager. Staff presenting at a meeting or event sponsored by an external company must be cautious of any bias generated through accepting sponsorship. Under no circumstances should any employee agree to linked deals where sponsorship is linked to a commitment to purchase, prescribe or use a particular product or company.

If the meeting is to take place within working hours the company should have no influence over the content of any presentation made by the NHS Lanarkshire employee. Staff presenting at sponsored meetings should ensure that their presentation is consistent with current approved clinical practice, formulary and clinical protocols in use in NHS Lanarkshire. Clinicians who undertake to attend or speak at sponsored meetings in their own time do so as a clinical specialist and not as an NHS Lanarkshire employee; therefore, any slides or handouts etc. should not display the NHS Lanarkshire logo.

In all circumstances it should be made clear that the employee's presence does not imply that NHS Lanarkshire endorses any of the company's products or services. See Section 10 – References (Staff Guidance relating to contact between NHS Lanarkshire Staff and Pharmaceutical & Healthcare Company Representatives).

5.5 Grievances

If, at any stage, a member of staff is unhappy with decisions made in relation to learning, education and training studies/activities, reference should be made to the NHS Lanarkshire's Grievance and Disputes Policy refer to Section 10 - References. In the first instance, the member of staff must raise the matter informally with the next level of management.

If no resolution is achieved from the informal meeting, the employee may choose to initiate the Grievance procedure.

5.6 Dissemination of learning

Managers are responsible for discussing the outcome of their staffs' participation in any learning, education and training studies/activity.

Managers should encourage staff to share learning outcomes and application with colleagues in the workplace.

Staff members may be required to submit a written report or short presentation following completion of learning, education and training activity.

5.7 Confidentiality and Data Protection

NHS Lanarkshire uses a single electronic system for recording staff training records, this is to ensure that there is a training record for all current and previous employees. Training providers and staff across NHS Lanarkshire should use the process in place through the HR Department to ensure all data is recorded on the HR electronic system.

The Code of Practice, Scottish Government Records Management, has been published by the Scottish Government eHealth Directorate as a guide to the required standards of practice in the management of records for those who work within or under contract to NHS organisations in Scotland. It is based on current legal requirements and professional best practice and states that:

- Personal Development: nurse training records must be retained for a **minimum of 30 years after completion of training**. (Applies only to Nurse Training carried out in hospital based nurse training schools.)
- Personal Development: study leave applications must be retained for a **minimum of 2 years**. Within NHSL this will cover all training applications
- Further & Higher Education paperwork must be retained for a **minimum of 7 years** from the date studies are completed

See Section 10 – References - Ref: Scottish Government Records Management – NHS Code of Practice (Scotland) Version 2.1 Page 98 & 99

6. RESOURCE IMPLICATIONS

There is a requirement to invest in learning, education and training activity across the organisation and as such there will be resource implications for the organisation in releasing staff to attend learning, education and training events.

There will also be the associated costs for education/training and course fees and where individuals are entitled to reimbursement of their travel and where appropriate, accommodation/subsistence in relation to authorised events.

Travel costs and accommodation should be booked by using the Travel Request Form available from Procurement.

7. COMMUNICATION PLAN

- This policy will be launched using the weekly staff briefing and it will be available on Firstport.
- This policy will also be discussed at the appropriate management team meetings and local partnership fora.
- Staff within Human Resources and Organisational Development will be briefed on the content of the policy.

8. QUALITY IMPROVEMENT – Monitoring and Review

- This policy will be reviewed every three years via the Joint Policy Forum

9. EQUALITY AND DIVERSITY IMPACT ASSESSMENT

- This policy meets NHS Lanarkshire's EQIA ✓

10. REFERENCES

This policy should be read in conjunction with other supporting policies, documents and associated guidance which are held on the NHS Lanarkshire website www.nhslanarkshire.scot.nhs.uk

- Staff Governance Standards 4th Edition 2012
- Achieving Excellence March 2017
- NHS Lanarkshire Learning Strategy
- NHS Lanarkshire Quality Strategy 2018-2023

- NHS Scotland National Expense Forms, <http://www.sss.scot.nhs.uk/claimants/>
- Effective Management of Employee Conduct Policy and Procedures
- Grievance and Disputes Policy
- Knowledge and Library Service Borrowing Policy
- Knowledge and Library Service Collection Policy
- Equality, Diversity & Human Rights
- Standing Financial Instructions and Scheme of Delegation
- Learning, Education and Training Records Policy
- Personal Development Planning and Review Policy
- Standards of Business Conduct, Code of Conduct
- Management and Exploitation of Intellectual Property (IP) Policy
- Career Break
- Copyright Policy
- Driving Licence Review
- Car Leasing Scheme
- Information Security Policies
- Working Time Regulations Policy
- Scottish Government Records Management: NHS Code of Practice (Scotland) Version 2.1 January 2012

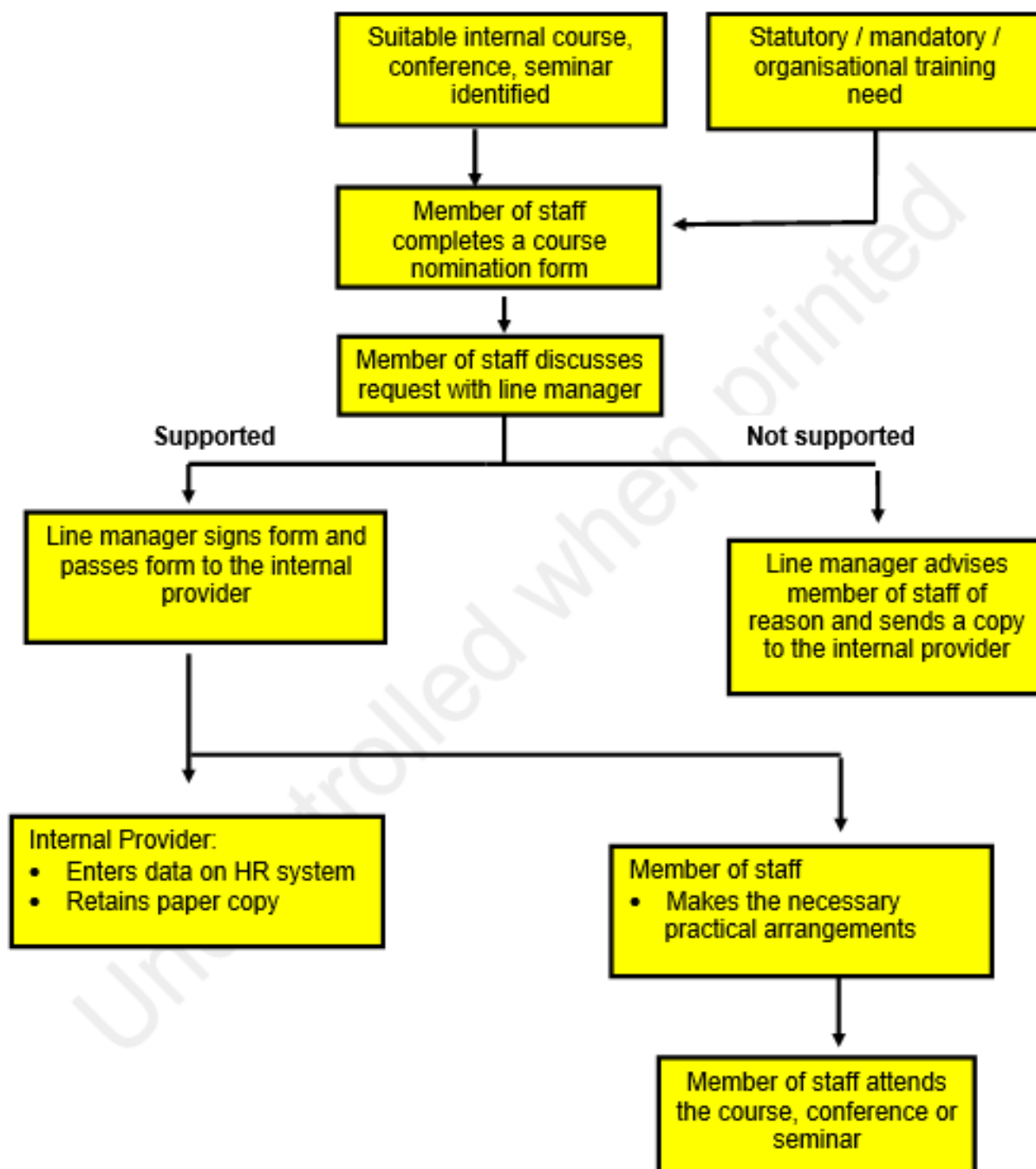
Guidance

- Staff Guidance relating to contact between NHS Lanarkshire staff and Pharmaceutical & Healthcare company representatives
- Travel Request Form
- Authorisation of External Leave Funding Request Form
- Further and Higher Education Application Form
- Overseas Leave Application Form
- NHS Lanarkshire Expenses Procedure for Employees
- HM Revenue and Customs, 480 (2015), Expenses and Benefits – A tax guide

Internal Study Leave Information

Definition	INTERNAL LEARNING LEAVE is classified as leave to attend courses, conferences, e-Learning or seminars organised by various NHS Lanarkshire departments with responsibility for learning, education, training and development, i.e. Organisational Development, Practice Development Centre for Nursing, Midwifery and Allied Health Professions, Medical Education and other departments/specialists as appropriate (e.g. Specialist Nurses, Child Protection, Research and Development).
Application Procedure	<p>Procedure for applying for Internal Learning</p> <ul style="list-style-type: none"> • Individual discusses with Line Manager • Development needs identified as part of PDP • Complete request to attend using eESS Oracle Learning Management (OLM) system or associated application procedure and paperwork. All learning request should be recorded in OLM for monitoring, ensuring equal opportunities and reporting purposes. • If the line manager is unable to support/authorise the application, they should discuss this with the member of staff. If requested via OLM the manager should reject the electronic request via the OLM system. • Where an application has been declined/not authorised reasons should be recorded on the OLM system.
Leave Entitlement	When staff member and line manager agree participation is appropriate, staff are entitled to paid leave to attend internal training events - a training day is considered a working day. It is, however, recognised that not all training days are of one-day duration and not all staff work a “standard” 7½ hour day. Examples have been developed as part of the frequently asked questions guide where working hours and training duration are not regarded as “standard”.
Fees	Fees for events arranged by the departments above are met from NHS Lanarkshire budgets and there are no direct financial commitments for staff attending such events. *Some National Medical Education programmes may incur a direct financial commitment.
Expenses	Staff are entitled to reimbursement of their excess travel costs where an event takes place on a site other than the staff members’ base. Staff are expected to travel by the most cost effective method. Guidance on reimbursement allowances can be obtained from payroll department. Claims should be made through the e-expenses system and charged against departmental travel budgets.
Failure to attend	If for any reason a member of staff is unable to attend an authorised event they must advise their line manager in the first instance. The individuals or the line managers must update/cancel attendance via OLM directly. Where paper processes apply, contact should be made with the learning provider. Failure to attend will be recorded and updated within the OLM system. This OLM system automatically notifies line managers of non-attendance. If a member of staff has been granted learning leave and / or expenses and then fails, without reasonable cause, to attend the course, complete the course work or sit the exam, the member of staff may be subject to disciplinary processes.
Additional information	Please refer to the Internal learning leave flowchart and frequently asked questions for further details. On successful completion of the internal learning the member of staff or line manager must record the learning in the individuals’ personal record within the OLM system.

INTERNAL LEARNING LEAVE FLOWCHART



External Study Leave Information – The process will be reviewed following the outcome of Brexit

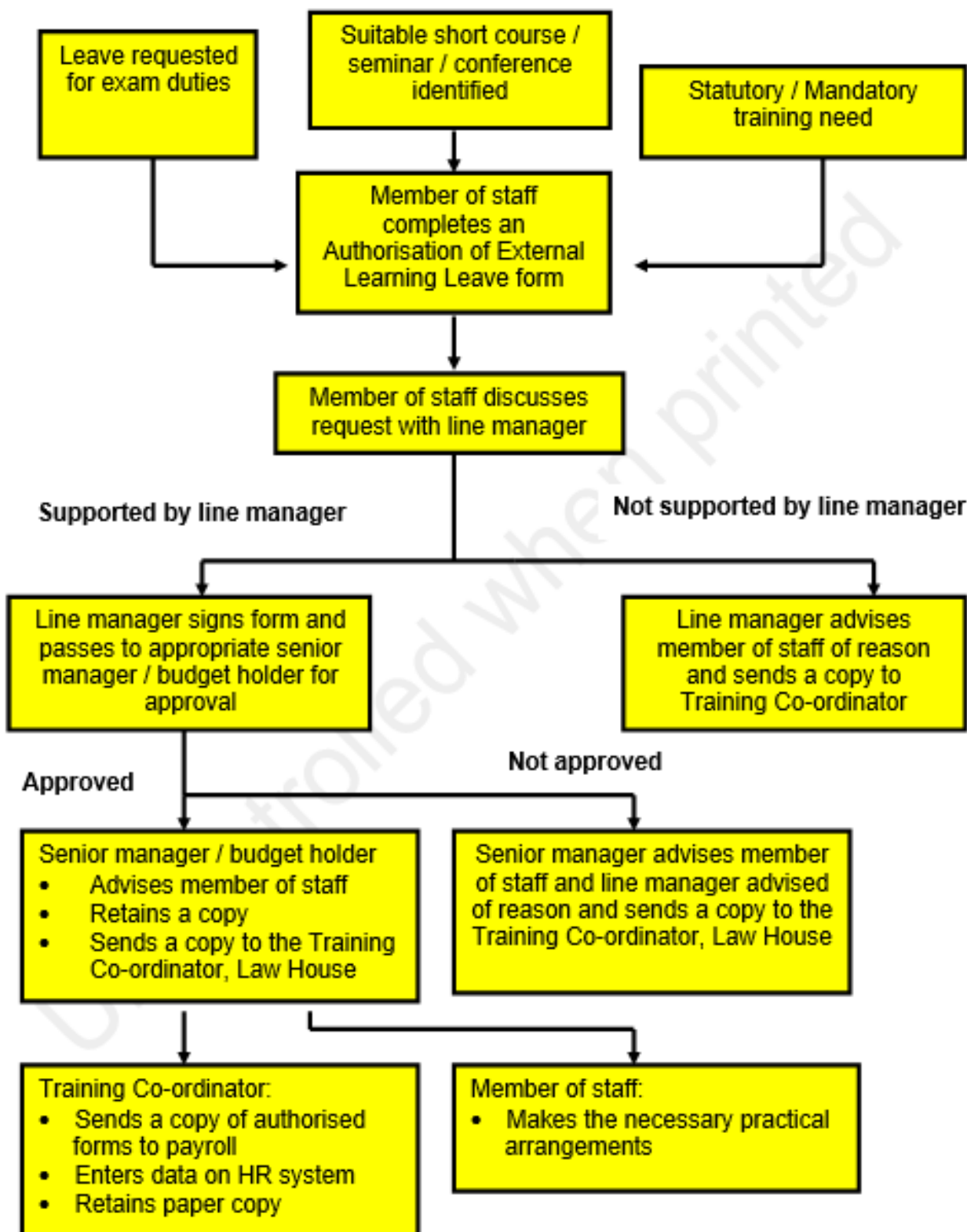
Definition	<p>EXTERNAL LEARNING LEAVE is classified as leave to attend courses, conferences, e-Learning or seminars organised outwith NHS Lanarkshire but within the European Union. This does not include:</p> <ul style="list-style-type: none"> • Courses of further and higher education • Studies out with the European Union - refer to the Overseas Learning Leave procedure. • Note: Staff wishing to act as an examiner (e.g. medical and dental staff), conducting examinations for students' professional registration / qualification must apply for learning leave. Leave for these purposes will be given without prejudice to learning leave entitlement for ongoing professional development.
Application Procedure	<p>Procedure for applying for External Learning</p> <ul style="list-style-type: none"> • Individual discusses development need with Line Manager • Individual requests external study leave via OLM • Complete Authorisation of External Leave Funding Request Form and ensure senior manager (budget holder) approves • If the manager is unable to support/authorise the application they should discuss this with the member of staff and reject the request via OLM adding reason why request is rejected. • Supported external leave funding forms must be sent to payroll department - this is essential to ensure that any fees or expenses are paid • All requests should be recorded on the OLM system for monitoring, ensuring equal opportunities and reporting purposes.
Leave Entitlement	<p>When staff member and line manager agree participation is appropriate, staff are entitled to paid leave to attend external training events - a training day is considered a working day. It is, however, recognised that not all training days are of one day duration and not all staff work a "standard" 7½ hour day. Examples have been developed as part of the frequently asked questions guide where working hours and training duration are not regarded as "standard".</p>
Fees	<p>Reimbursement of fees for authorised short courses, conferences and seminars is 100% for all staff. Examination/assessment fees not included as part of any short course fee will be reimbursed at 100%</p> <p>External Sponsorship / Other Source of Funding - To ensure staff maintain strict ethical standards in the conduct of NHS business any external sponsorship or sources of funding should be reviewed and adhere to the Code of Conduct on Standards of Business Conduct for NHS Lanarkshire – Section 10 – References.</p>
Expenses	<p>Staff are entitled to reimbursement of their travel and, where appropriate, accommodation / subsistence in relation to attendance at authorised events.</p> <p>Staff are expected to travel by the most cost effective method. Guidance on reimbursement allowances can be obtained from payroll department. Claims should be made through the e-expenses system and charged against departmental travel budgets unless booked directly by Procurement.</p>

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Failure to attend	If for any reason a member of staff is unable to attend an authorised event they must advise their line manager and should contact the Training provider to advise. If a member of staff has been granted learning leave and / or expenses and then fails, without reasonable cause, to attend the course, complete the course work or sit the exam, the member of staff may be subject to disciplinary processes.
Additional information	Please refer to the External learning leave flowchart and frequently asked questions for further details.

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External Learning Leave Flowchart



Further and Higher Education Leave Information

Definition	<p>FURTHER and HIGHER EDUCATION LEAVE is classified as leave to attend courses which, after examination or assessment, lead to the award of a nationally recognised qualification awarded by recognised bodies such as Colleges of Further and Higher Education, Universities or Professional Organisations.</p> <p>NHS Lanarkshire will only support (time/and or funding) for further and higher education agreed and approved through the formal process. Individuals seeking funding for further and higher education must apply in advance of course application.</p>
Application Procedure	<p>Procedure for applying for Further and Higher Education</p> <ul style="list-style-type: none"> • Individual discusses with Line Manger • Development needs identified as part of PDP • If the staff member is not supported and is dissatisfied with the manager’s decision the matter should be referred to the next appropriate senior manager for review. Where agreement cannot be reached, the member of staff may invoke the grievance procedure (see policy: The Resolution of Disputes and Grievances (Employee Dissatisfaction). • Complete associated application procedure and paperwork. • All Applications for funding support will be invited by the Organisational Development Department in March of each year and considered for approval by the Further and Higher Education Group. • Some Further or Higher Education courses commence throughout the academic year, however applications must still be submitted at the start of NHS Lanarkshire’s financial year. • Members of staff who access funding from other sources (e.g. bursaries, grants, sponsorship or self-funding) require to apply through this procedure. The only exception is where the course is part of a national initiative. • Courses in excess of one year requires members of staff to submit a report outlining their achievements to date, including exam / assessment results. Reports should be submitted to the line manager who will forward to the Organisational Development Department confirming continuing satisfactory performance. This forms the criteria for further on-going support.
Leave Entitlement	<p>Further and Higher Education Leave Entitlement</p> <p>Further and Higher Education can be delivered in a variety of formats: day release, evening classes or distance/open learning. Leave entitlement for each of these is as follows:</p> <p>Day release – members of staff will be allowed leave during normal working hours to attend those classes and examinations that are part of the authorised course. No additional learning leave will be given for examination or assessment preparation.</p> <p>All other formats of courses (e.g. evening classes or distance/open learning) paid leave will be granted for attendance at examinations required as part of the course. In addition, up to five working days per academic year may be granted to prepare for significant examinations or assessments.</p>

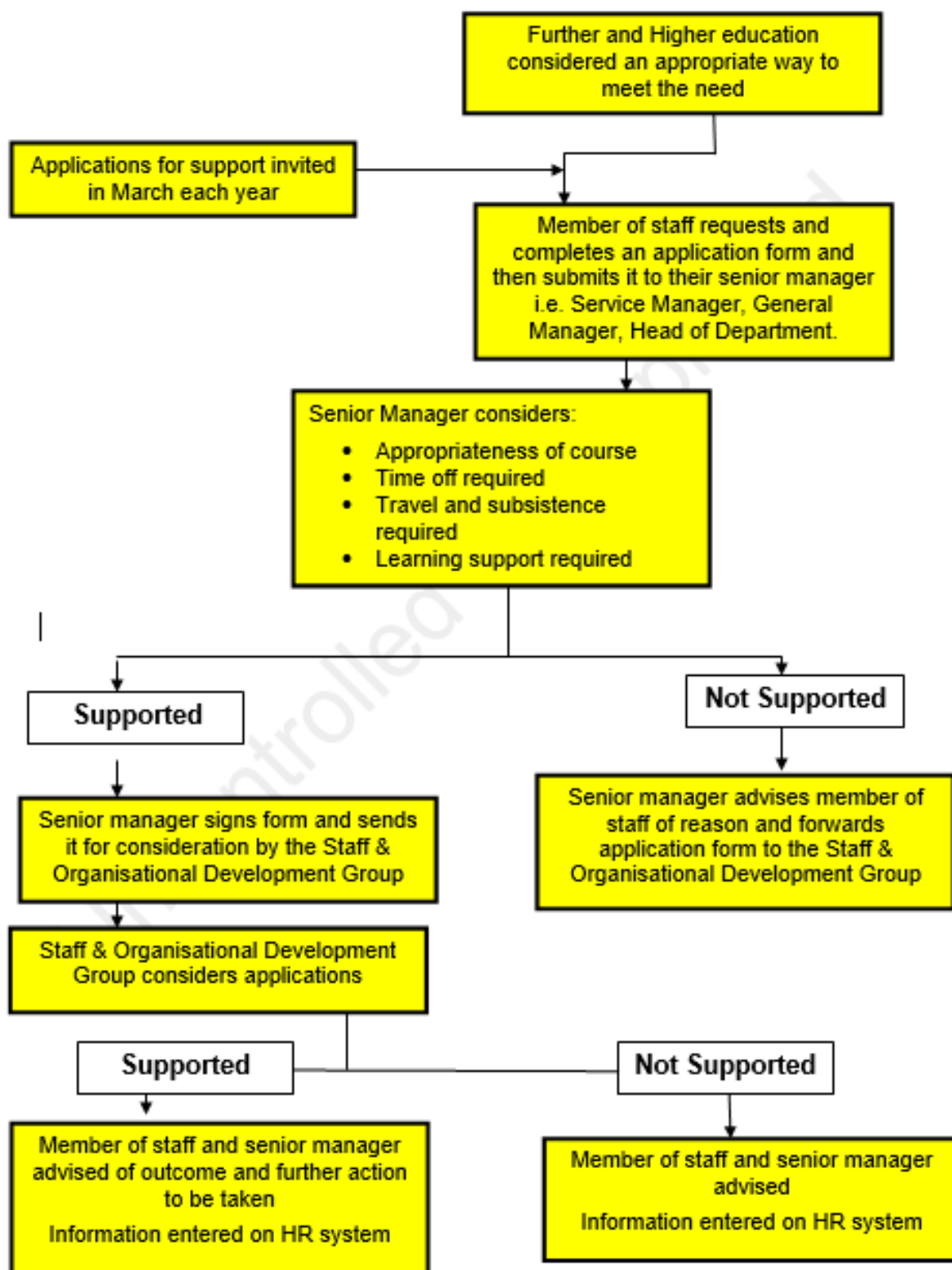
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<p>Fees</p>	<p>Funding arrangements for further and higher education are as follows:</p> <ul style="list-style-type: none"> • 100% for Essential for sustaining effective service delivery and is a recognised path to appropriate professional or technical registration. NHS Lanarkshire will pay the full fee directly to the College / University. • 75% for programmes Desirable, for both individual development and professional value to NHS Lanarkshire where the majority of the syllabus is relevant to the job. • 50% for Individual career development; where only part of the syllabus is relevant to the job and will benefit the individual in their future career pathway. <p>Where 75% or 50% funding has been granted NHS Lanarkshire will pay the full fee directly to the College / University and recover the member of staffs portion of the course fees from their salary over the course of the financial year. This will be via a mandate, which the member of staff will be required to sign prior to any fees being paid. To ensure equity across all staff groups, it is unacceptable for individual departments to “top-up” through other NHS Lanarkshire funding or external sponsorship. If a member of staff is eligible for an Individual Training Account (ITA) or a Part Time Fee Grant, this will be offset against their proportion of fees. It is the responsibility of the member of staff to apply for funding through these routes. Funding levels/support (if any) will be determined by the members of the Further and Higher Education Group.</p> <p>Self Funding - Where a member of staff offers to partially or fully self-fund the manager can use discretion to award learning time. However self-funding must be at the member of staffs request and not at the request of the manager.</p> <p>Examination/Assessment Fees - Where examination/assessment fees are not included as part of the course fees these should be reimbursed at the same level as that for the funding for the course itself (i.e. 100%, 75%, 50% as appropriate).</p> <p>Re-sits Examinations/Re-submissions Funding associated with re-sit examinations, re-submissions and repeat years may be available. The member of staff must be able to show that their effort was reasonable and /or to show that there were particular family, personal or other exceptional circumstances leading up to this.</p>
<p>Expenses</p>	<p>Staff are entitled to reimbursement of their travel and, where appropriate, accommodation / subsistence in relation to attendance at authorised events. Staff are expected to travel by the most cost effective method. Guidance on reimbursement allowances can be obtained from payroll department Claims should be made through the e-expenses system and charged against departmental travel budgets</p> <p>Text Books - Where possible, books will be made available through the NHS Lanarkshire libraries.</p>

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	<p>Professional Registration Fees - A registration fee for membership of professional organisations, even when required for learning, is the responsibility of the staff member and not NHS Lanarkshire.</p>
<p>Failure to attend</p>	<p>If for any reason a member of staff is unable to attend the course or sit the exam they must advise their line manager and the college/university. If a member of staff has been granted learning leave and /or expenses and then fails, without reasonable cause, to attend the course, complete the course work or sit the exam, the member of staff may be subject to disciplinary processes.</p> <p>Withdrawing from the authorised course after registration but before completion of the qualification - NHS Lanarkshire reserves the right, in other than exceptional circumstances, to recover all or part of any funding or expenses granted from the individual or departmental budget. In the first instance the member of staff should discuss their withdrawal with the senior manager who supported their application. The senior manager will then advise Organisational Development Department, Law House and give their recommendation.</p> <p>Leaving NHS Lanarkshire within 2 Years If a member of staff leaves the employment of NHS Lanarkshire within 2 years of being granted leave, funding or expenses for a further or higher education course NHS Lanarkshire reserves the right to recover all or part of any funding or expenses granted. The senior manager who supported the application must advise Organisational Development Department, Law House as soon as possible to allow time for the necessary arrangements to be discussed.</p>
<p>Additional information</p>	<p>Please refer to the Further and Higher Education leave flowchart and frequently asked questions for further details. On successful completion of the qualification the member of staff or line manager must enter the qualification gained in the individuals' personal record within the OLM system.</p>

Further and Higher Education Leave Flowchart



Overseas Leave Information – Interim policy until March 2022 to reflect changes due to Brexit and COVID guidance with anticipated review in September 2022

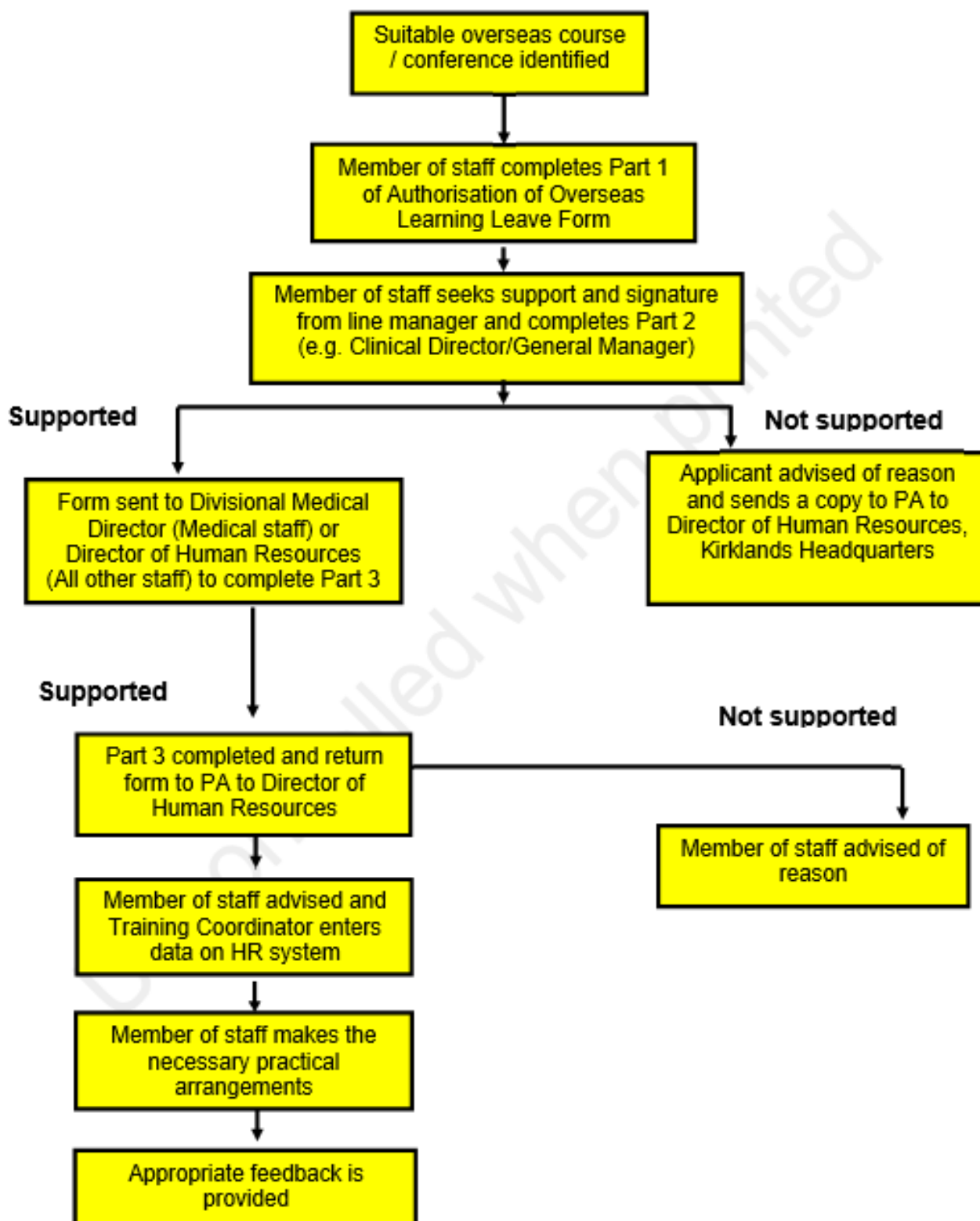
Definition	OVERSEAS LEARNING LEAVE is classified as leave to attend courses, conferences, examination duties, educational visits, teaching, research or seminars which take place out with the European Union . Note: Staff wishing to act as an examiner (e.g. medical and dental staff), conducting examinations for students’ professional registration / qualification must apply for overseas learning leave. Overseas Learning Leave for these purposes will be given without prejudice to overseas learning leave entitlement for ongoing professional development.
Application Procedure	<p>Individual discusses with Line Manger Development needs identified as part of PDP Complete associated application procedure and paperwork Applications for all Overseas Learning Leave must be made using the Overseas Learning Leave Application form, (See <i>Appendix 2</i>), giving at least six weeks notice. Retrospective approval will not normally be given. Applications must adhere to all COVID restrictions, guidance and national and local policy in relation to travel arrangements. The procedure is summarised in a flow-chart (see <i>Appendix 1</i>)</p> <ul style="list-style-type: none"> • Members of staff should complete Part 1 of the form and then pass it to their line manager for completion of Part 2. • The paperwork should then be passed to the Divisional Medical Director (Medical staff) or Director of Human Resources (all other staff) for completion of Part 3. • Irrespective of whether the application is supported or not, the paperwork would be sent to the PA to the Director of Human Resources, Kirklands Headquarters, Fallside Road, Bothwell G71 8BB. • Both the member of staff and their line manager will be advised of the outcome.
Leave Entitlement	Consideration will be given to the relevance of the application to the member of staff and their work and the benefit to NHS Lanarkshire and its patients or population. If an overseas learning leave application is approved, paid leave will normally be granted.
Fees	<p>In addition, fees and associated costs will normally be granted on the basis of the guidelines below, subject to budget availability.</p> <p>100% for Active participation at an event (e.g. chairing, presenting a paper, delivering a workshop session, etc.) 100%, 75% or 50% -Attendance at an event dependant on how relevant the content is deemed to be 100%, 75% or 50% - Visits dependant on how relevant the content is deemed to be</p>
Expenses	<p>Staff are entitled to reimbursement of their travel and, where appropriate, accommodation / subsistence in relation to attendance at authorised events.</p> <p>Staff are expected to travel by the most cost effective method. Guidance on reimbursement allowances can be obtained from payroll department Claims should be made through the e-expenses system and charged against departmental travel budgets</p>

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Failure to attend	If for any reason a member of staff is unable to attend overseas leave they must advise their line manager and the personal assistant to the Human Resources Director. If a member of staff has been granted overseas leave and /or expenses and then fails, without reasonable cause, to attend, the member of staff may be subject to disciplinary processes.
Additional information	Please refer to the Overseas Learning leave flowchart and frequently asked questions for further details.

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Overseas Learning Leave Flowchart



Authorisation of Overseas Learning Leave

(Travel out with the European Union)

Part 1

Details of Applicant

Name:	Pay Number:
Designation:	Clinical Division / Locality:
Work address:	Department:
Email address:	Work Phone no.:

Details of Overseas Learning Leave Requested

Purpose of the learning leave (e.g. attending conference, presenting paper, teaching):	
Other relevant information about your application, including benefits to you and patient care:	
Start date:	End date:
Total duration of leave, including travel time:	Location(s) to be visited:

Estimated Funding request from NHS Lanarkshire

Course / event fees:	£
Travel:	£
Subsistence:	£
Other:	£
Total funding requested:	£

External Sponsorship / Other Source of Funding

It is important that NHS Lanarkshire and its employees maintain strict ethical standards in the conduct of NHS business and are protected from allegations of conflict of interest, acting improperly or breach of impartiality. For guidance please refer to the Code of Practice on Standards of Business Conduct and Acceptance of Gifts and Hospitality for NHS Lanarkshire Employees.

Are you being sponsored to attend the event? Yes / No

Are you receiving funding from any external source? Yes / No

If you answered yes to either of the above, please give details below. Estimated funding **must** be noted irrespective of whether this is in cash or kind, e.g. travel tickets or vouchers.

Funding source / provider:	
Course / events fees:	£
Travel:	£
Accommodation:	£
Subsistence:	£
Other:	£
Total sponsorship / other funding:	£

Learning Leave granted within the last 3 years

Overseas:
Within the United Kingdom / EU

Payment of Fee

Do you require NHS Lanarkshire to send a cheque in advance to confirm booking of course/event?

Yes / No (if yes, please attach completed booking form)



I hereby make application for overseas learning leave with expenses as detailed above I undertake to provide a written report as required. I note that travel insurance is my responsibility.

Data protection: To enable your application to be processed, personal data provided on your application form will be entered onto the NHS Lanarkshire computer training records. At all times use of this data will be strictly in accordance with the principles laid down by the current data protection legislation.

Applicant's signature:

Date:

Part 2

To be completed by the applicant's Clinical Director, Associate Director, General Manager or Executive Director as appropriate.

Is the application supported? Yes / No

Comments:

Comments:	
Signature:	Name (please print):
Designation:	Date:
Budget Code:	Location:

Part 3

To be completed by:

- Divisional Medical Director (for Medical, Dental, Senior Scientific Staff only)
- Director of Human Resources for all other staff.

Is the application supported?

Yes / No

Comments:	
Signature:	Name (please print):
Designation:	Date:

The application form should now be sent directly to the Director of Human Resources, Board HQ, Kirklands Hospital, Fallside Road, Bothwell G71 8BB

For OD use only	
Application received:	
Considered by Executive Director:	
Applicant /Manager notified:	
Finance notified:	
Data input:	
Subject code: XCONF / XCRSE Leave Type: OSEAS	

Source: <https://www.gov.uk/eu-eea>

LEARNING, EDUCATION AND TRAINING LEAVE POLICY FREQUENTLY ASKED QUESTIONS

Q. What happens if I work night duty and want to attend a training course?

Answer:

If a member of staff is working night duty, consideration should be given to off duty and sleeping patterns. No one is to be expected to work nights and attend a day time training event on the same day.

Q. I work part time hours but need to attend a full day training? Do I get my time back?

Answer:

If a member of staff works mornings only but attends a full-day training event, excess hours will be given in lieu at a mutually agreed time, ideally within one month. Where adjustments to working time are required, these should be agreed between the member of staff and their line manager prior to authorisation to attend being given.

Q. I work 12 hour shifts but have been asked to attend a half day training - Do I have to go back to work?

Answer:

If a member of staff who normally works 12 hour shifts attends a shorter training event, consideration should be given to travelling time back to the base site and then agreement reached on the number of hours "owed" to NHS Lanarkshire. It would normally be expected that these be worked at a mutually agreed time within the next month. Staff will not, generally, be expected to report to their base before such an event or return to their base to complete a couple of hours work on the day of the training event.

Q. What happens if I need to attend a training event on a non-working day?

Answer:

If a member of staff, with the agreement of their manager, chooses to attend a training event on a non working day, time off in lieu will be given at a mutually agreed time, ideally within one month.

Q. What happens if I need to attend a training event that is not part of my normal working hours?

Answer:

Where adjustments to working time are required, these should be agreed between the member of staff and the line manager prior to authorisation being granted.

Q. My course requires me to complete distance learning – do I get time allocated for this?

Answer:

Where a member of staff, with the support of their line manager, undertakes a programme which includes distance or e-learning, appropriate time should be allocated for this.

Q. I started a course at university but my circumstances have changed and I cannot continue at the moment – can I re-join at a later date?

Answer:

There may be circumstances when a member of staff is unable to continue with a course of learning due to family, personal or other exceptional circumstances.

An application for a break in learning, outlining the reasons, should be made to Organisational Development Department, Law House. NHS Lanarkshire may continue to provide support for the course of learning in these exceptional circumstances. However, a member of staff will not normally be allowed to defer for more than 1 year. A break in learning will not preclude a member of staff applying for support in future years.

Q. Where can I find the overseas leave form?

Answer:

The application form for overseas leave can be found within the learning, education and training policy on the NHS Lanarkshire website.