Somerset Partnership NHS
NHS Foundation Trust

LEARNING, DEVELOPMENT AND MANDATORY TRAINING POLICY

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Relevant Staff Group/s:	All Staff – Trust wide

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DOCUMENT CONTROL

Reference RW/Nov/12/LD&MP	Version 2	Status Final	Author Learning & Development Operational Lead
Amendments	Reviewed to reflect new ways to access learning and link to registration/ revalidation requirements.		
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Intended recipients: All staff			
Committee/Group Consulted: Workforce Group, Joint HR Policy Review Group			
Monitoring arrangements and indicators: Quality and Performance Committee			
Training/resource implications: in line with the Trust Mandatory Training Matrix			

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Contact for review	Head of Learning and Development	
Lead Director	Director of Workforce and Organisational Development	

CONTRIBUTION LIST Key individuals involved in developing the document

Designation or Group
Head of Learning and Development
Claims & Litigation Manager/RMS Project Lead
Workforce Group
Joint Policy Review Group
Quality and Performance Committee
Senior Managers Operational Group
Equality and Diversity Lead

CONTENTS

1. INTRODUCTION

1.1 The Trust recognises that its staff are its most valuable resource and supports and encourages learning to enable the realisation of individual professional and personal potential.

1.2 The Trust is committed to ensuring that all staff receive appropriate training, learning and development to ensure they are confident and competent in their job role. This provision will support staff to be able to provide person centred, high quality and evidence based care and provide them with the opportunity to develop and progress in their field of expertise.

1.3 The Trust is committed to developing a workforce that continuously strives to improve the quality of services it provides. It seeks to do this by utilising the talents, skills and experience of its workforce and by encouraging staff to seek out learning opportunities at the discretion of their local management.

1.4 The Trust is committed to supporting Mandatory Training, Continuing Professional Development and Life Long Learning. It recognises the importance of developing a skilled and competent workforce in order to enhance patient and client care and to reduce risks to patients, staff and visitors.

1.5 The Trust will ensure its mandatory training is able to meet the diverse learning needs, and in particular disability and sensory impairment, of its workforce and will make the necessary adjustments on an individual basis. The Trust will monitor the uptake of training to ensure these diverse needs are met.

2. PURPOSE & SCOPE

2.1 The aim of the policy is to ensure that all staff are aware of the procedures to follow when accessing training, learning and development and to ensure that all staff complete mandatory training as required

2.2 The policy sets out the responsibilities of staff to attend mandatory training and to ensure that their training is updated in line with the requirements set out in the Mandatory Training Matrix (training needs analysis).

2.3 The policy applies to permanent, temporary, seconded and bank staff.

3. DUTIES AND RESPONSIBLITIES

3.1 The **Chief Executive** has overall responsibility for ensuring that all staff within the organisation are provided with the appropriate level of training required to undertake their role in a safe, competent and efficient manner.

3.2 The **Director of Workforce and Organisational Development** is the **Executive Lead** with devolved responsibility for this policy.

3.3 The **Learning and Development Operational Lead** is the author of this policy who will ensure this document is reviewed at least every three years or sooner if national or local changes are required.

3.4 The **Learning and Development Team** will ensure courses are advertised in a timely manner, attendance is recorded using the training attendance sheet and subsequently attendance recorded on the electronic Learning Management System (Learning Zone). The Team will provide monthly non-compliance reports to Heads of Division to support and assist with the management of mandatory training within the Trust.

3.5 **The Workforce Group** will monitor the delivery and take-up of mandatory and other training and will provide assurance that mandatory training targets are being met and that training is meeting the needs of the organisation.

3.6 The **Quality Assurance Committee** is responsible for approving any changes to this document.

3.7 **Line Managers** are responsible for ensuring all staff receive their annual Staff Appraisal which includes the review of staff Personal Development Plan and a discussion of any agreed action around outstanding mandatory training. Managers will ensure the release of staff for required training and will also follow up non-compliance and non-attendance at courses.

3.8 All **staff** (including members of the Trust Board and Senior Managers) are required to ensure they are up-to-date with all training identified within the Trust's Mandatory Training Matrix (Training Needs Analysis) according to their individual staff group.-

- All other duties and responsibilities are detailed within the process described in this document and listed within the Learning Contract Appendix A

Mandatory training requirements for each staff member will be shown on the personal learning record on the Learning Management System and outstanding mandatory training will be flagged up.

4. EXPLANATIONS OF TERMS USED

4.1 **Mandatory training** – compulsory training identified in the Mandatory Training Matrix (training needs analysis) which staff **must** complete;

4.2 **Mandatory Training Matrix** - the document which identifies the Mandatory training requirements according to staff group and requirements for updating/refreshing;

4.3 **Staff groups** - defined in the Mandatory Training Matrix (eg nursing staff with a clinical professional qualification, nursing assistant, allied health professions, medical, administration and clerical staff, support services);

4.4 **Non-attendance** (also known as Did Not Attend or DNA) – failure to attend training without prior notice/cancellation;

4.5 **Designated groups of staff** – those staff who are part of a staff group, required to complete training in order to meet particular duties eg First Aid training, Fire Warden training;

5. PRIORITISING LEARNING AND DEVELOPMENT

5.1 The Trust recognises the need to prioritise training resources in order to ensure key business priorities are achieved. Learning and Development activity has therefore been organised into three main categories:

- Mandatory Training
- Priority Business Needs
- Continuous Professional Development

6. LEARNING CONTRACT

6.1 In order to ensure that staff make the most of their learning and all parties understand what is expected of them, staff are expected to work within the Trust's Learning Contract which is attached at Appendix A.

7. MANDATORY TRAINING

7.1 Mandatory training needs will be determined by the relevant governance groups as part of the Trust's overall governance process. Mandatory training will reflect policy content which will have been approved through each governance group and ratified at the Senior Managers Operational Group

7.2 Mandatory training is compulsory for all staff and is intended to ensure that staff are aware of their responsibilities to comply with set standards. A flowchart of mandatory training processes and reporting is set out in appendix C.

7.3 Provision of mandatory training is planned using a gap analysis approach from the Learning Management System data. Outstanding need and projected need guide future planning and geographical allocation of provision. Learning and Development Business Partners will gather additional information from Heads of Division about gaps in particular areas or teams

7.4 To ensure a structured and manageable approach to mandatory and refresher training, a Mandatory Training Matrix has been developed. The Matrix is a live document and the most up to date version can be found on the Learning and Development Pages of the Trust intranet. The Mandatory Training Matrix (training needs analysis) incorporates all required Training in line with the NHSLA Risk management Standards minimum training requirements. It identifies the mandatory training requirements for all staff groups and includes the requirements for updating/refreshing. Approval of this document is via the

Trust Board and Executive Team. The Mandatory Training Matrix will be reviewed annually by the Learning and Development Team.

7.5 To make Mandatory Training as flexible and easy to access as possible, some modules of training have been amalgamated into Mandatory Training Days. These days can be accessed at venues across the Trust. Where possible, staff are able to access their training via Test Your Knowledge exercises and e-learning. The Learning and Development team is committed to providing flexible and up-to-date learning through a programme of e-learning development.

7.6 New members of staff are expected to complete their Mandatory Training within 3 months of their start of employment with the Trust. It is the responsibility of the member of staff to book themselves onto mandatory training and it is the responsibility of the line manager to ensure that mandatory training is completed.

7.7 Records of attendance will be completed at each Training session using the Trust's standard training attendance record which can be found on the Learning and Development pages of the Trust Intranet http://intranet.sompar.nhs.uk/Learning_and_Development.aspx . The Training Facilitator delivering the training will forward all completed attendance records to the Learning and Development Team who will enter attendance onto the electronic Learning Management System.

7.8 Some staff are required to undertake specific training and updates in order to fulfil **professional registration and role-specific requirements and to meet the requirements for nurse revalidation**. This training may or may not be included in the Mandatory Training Matrix but it is the responsibility of the member of staff and their manager to identify these areas of training and fulfil these requirements.

7.9 **Methods of delivery of training** are identified in the Mandatory Training Matrix and options for access to training, eg, e-learning, are listed.

7.10 The Learning and Development Business Partners are happy to discuss any individual requirements which may require bespoke arrangements to support equal access and opportunity to a learning experience for all staff.

7.11 Staff should access their personal training record on the Learning Management System and be aware of the dates that their mandatory training is due to be refreshed or updated and make arrangements to update within the three months leading up to the due date.

8 PRIORITY BUSINESS NEEDS

8.1 Priority Business Needs Training is defined as Training which is essential in order to ensure the Trust is able to meet its strategic objectives.

8.2 Priority Business Needs may be identified through:

- strategic plans

- risk reports
- service changes
- critical incidents
- policy and procedure changes

8.3 The Trust follows a systematic process for identifying and funding training, education and development.

8.4 Managers identifying priority business needs are required to complete a proposal document which will be reviewed at the Workforce Group Meeting.

8.5 Further information can be found on the Learning and Development intranet site.

9 CONTINUOUS PROFESSIONAL DEVELOPMENT (CPD)

9.1 Continuous professional development is defined as “a range of development activities which build on professional skills and competencies and improve performance at work”. Examples of development activities could include shadowing other members of staff, practical based learning within the workplace, reflective practice and reading professional articles. For registered professionals, where there is a requirement to meet registration and revalidation requirements, CPD forms an important part of evidence to re-register and revalidate.

9.2 The Trust recognises that it is important to support staff to continually develop their skills and knowledge in order to ensure advanced healthcare practices are implemented and staff are competent in their roles.

9.3 Continuous development may be identified through:

- a personal development plan (PDP) as agreed at Appraisal
- day to day management by the Line Manager
- at Management Supervision session(s)
- at Clinical Supervision

9.4 Other programmes of Education and Continuous Professional Development are available for groups of staff and include:

- Skills for Life
- Information Technology/Computing Skills
- Vocational Education/Qualifications/Apprenticeships
- Widening Access
- Accredited University Courses

10 ADVERTISING OF COURSES

10.1 The Learning and Development Administrative Team updates the Learning Management System and releases details of all new courses together with further dates for existing courses. It is the intention that, wherever possible, staff are given at least 10 weeks' notice of new courses/dates so that they can arrange their diaries/clinics/off duty with training days in mind.

10.2 Course adverts received from outside of the Trust that are not validated or are unendorsed should be passed to the relevant service lead for a decision as to whether to cascade further. The Learning and Development Team will not circulate any flyers for courses not delivered by or in partnership with the Trust without approval from the appropriate service lead.

10.3 The Learning and Development Team are responsible for developing and maintaining a Trust Training Prospectus and this is available on the Learning and Development site of the Trust Intranet. This prospectus details the content, learning outcomes and suitability of training for all programmes available including mandatory training as detailed in the Trust Mandatory Training Matrix. The prospectus is available as an online document on the Learning and Development site of the Trust intranet.

11 COURSE CANCELLATION

11.1 The Learning and Development Team will only cancel mandatory training courses in exceptional circumstances. This would include the trainer being taken ill and a substitute not being available, severe weather conditions or a problem with the venue such as unplanned building works. In some circumstances a course may be cancelled if uptake is extremely low but this decision is only taken after attempts to increase uptake with the Line Managers in that area. The Learning and Development Team will always aim to ensure that there is alternative training provision to access. This may include training at a nearby venue.

11.2 When a course is cancelled, the Learning and Development Administrative Team will cancel the trainer, the venue and any refreshments or catering. They will then contact each person booked onto the course confirming the cancellation. If the Learning and Development Administration Team cannot contact the person directly, a message will be left with their manager.

12 NON ATTENDANCE AND CANCELLATION ON COURSES

12.1 The provision of training courses is expensive and the Trust takes non-attendance and cancellations very seriously. The Trust process and responsibilities for management of non attendance is set out below.

12.2 Managers will check their team's compliance reports on the Learning Management System and discuss any issues relating to non compliance (including non attendance) with the appropriate staff member/s.

12.3 Staff will be advised to book themselves onto the next available course by checking the Learning Management System or by contacting the Learning and Development Team for details of future courses.

12.4 Managers are required to investigate reasons for lack of attendance (particularly persistent non attenders) and instruct staff to improve their attendance. Management records of agreed actions should be kept on the staff member's file

12.5 Persistent Non Attenders will not be permitted to attend any other training (particularly external training funded by the Trust) until Mandatory Training is completed. Non compliance with Mandatory Training requirements may result in an investigation to understand the reasons why compliance has not been achieved and possible disciplinary action.

12.6 The Learning and Development Team will provide the Director of Workforce and Organisational Development and the Workforce Group with a quarterly report detailing all non attendance for review. Where significant trends are identified, Managers will be informed by email of non compliance which they must address with employees. The Workforce Group will escalate persistent non attendance highlighting areas of risk to the Workforce Governance Group who will monitor the implementation of further action.

12.7 If staff do need to cancel a place on a course, the Learning and Development Administration Team should be contacted as soon as possible.

12.8 In the event of a cancellation an automatic email is generated from the Administration Team to confirm receipt of cancellation.

12.9 Any Mandatory Training **MUST** be re-booked immediately (at the time of cancellation) through the Learning Management System

12.10 Line Managers have a responsibility to inform the Learning and Development Team if a member of staff is off sick and cannot attend booked training.

12.11 All non attendance without previous cancellation will be reported back to the individual and their line manager as a Did Not Attend, once training registers have been processed

13 WAIT LISTED COURSES

13.1 In order to determine demand and improve course take up, a waiting list system has been developed. Managers and staff will be able to view the range of courses on the Learning Management System and register the need for a training programme. Waiting lists are reviewed on a monthly basis and courses booked when minimum numbers are reached. It should be noted that some wait listed courses are determined by the availability of funding.

14 EXTERNAL COURSES

14.1. Where funding for external courses is paid for by the individual or their department, individuals should complete a Study Leave Application Form(see

Appendix B) which should be sent to the Learning and Development Admin team for their records. Once the training has been completed, the member of staff should inform the Learning and Development team so that attendance can be recorded in the individual's learning record.

14.2 Where the individual wishes to apply for central funds to undertake learning, the Application for funding for External Courses Form should be submitted to the Learning and Development team for consideration at the Workforce Group meeting. It should be noted that applications for less than £50 and/or for Conferences will not be considered. Retrospective applications for funding will also **not** be considered. See Appendix C.

14.2 Funding for training that is essential for the role (as determined by the Job Description and included on the Personal Development Plan) should be discussed at Recruitment and/or provision made to fund from the Department Budget.

15 WITHDRAWAL FROM FUNDED COURSES

15.1 Where staff have accessed funded courses and then fail to complete that course/module, they will be expected to refund to the Trust the full cost of the course/module. Extenuating circumstances will be taken into account and reviewed at the Workforce Group.

15.2 Any member of staff considering withdrawing from any training, but in particular funded courses/modules, must first discuss this with their Line Manager and the Learning and Development Team.

16 STUDY LEAVE

16.1 Mandatory training should be undertaken in work time wherever possible. Where this is not possible, staff and managers should discuss flexible learning options or the member of staff offered Time in Lieu or in some circumstances staff may be paid for this time.

16.2 Part time staff may take time in lieu when they are required to attend mandatory training at a time they would not normally be working however, time in lieu for any other *agreed* training courses will be subject to negotiation between the manager and member of staff.

16.3 Training that is essential for the role (as determined by the Job Description and included on the Personal Development Plan) should be supported as for Mandatory Training. Where training is lengthy in duration (such as a qualification programme), it is deemed reasonable that staff should be willing to invest a proportion of their own time towards the learning.

16.4 Continuous Professional Development study time should be negotiated with the Line Manager and is completely at the Line Managers discretion.

17 CLUSTER VENUES/TRAVEL EXPENSES

17.1 Training is available at venues across the Trust to ensure accessibility by all staff. Courses are offered in specific venues that are practical for the provision of training in terms of room capacity and parking on or close to the site. When training is not being delivered in the work base, the expectation is that staff will travel but within a given geographical area to a small range of venues close to their work base. These groups of training sites are known as cluster venues and are essential to an equitable provision of training across the Trust.

17.2 Where staff are travelling to attend mandatory training further than they would usually travel to their work base, they will be entitled to claim travel expenses at the public transport rate providing they have appropriate Business Use Insurance as set out in the Staff Travel and Expenses Policy.

17.3 Travel and/or accommodation expenses for training must be agreed in advance with the Line Manager. All travel claim forms must be authorised by the Line Manager. Travel/Accommodation expenses are not paid by the Learning and Development Team and staff should discuss their needs with their service budget holder

18 REPORTING TOWARDS MANDATORY TRAINING TARGETS

18.1 The Learning Management System enables detailed reporting to take place on training across the Trust linked to individuals and their roles. All staff are encouraged to register on the System. Managers are able to view the training records of their team through the system and identify non-compliance.

18.2 Monthly reports provided to Line Managers, Directors and the Trust Board include:

- detailed Mandatory Training Achievement Reports which include name, location, department and Directorate and show training expiry dates and booking information

- capacity reviews of courses to ensure all programmes are utilised fully

- dashboard and scorecard reporting to the Health, Safety and Security Management Group and the Trust board to enable the Trust to identify underperforming areas

19. TRAINING REQUIREMENTS

19.1 The Trust will work towards all staff being appropriately trained in line with the organisation’s Mandatory Training Matrix (training needs analysis). All training documents referred to in this policy are accessible to staff within the Learning and Development Section of the Trust Intranet.

20. EQUALITY IMPACT ASSESSMENT

20.1 All relevant persons are required to comply with this document and must demonstrate sensitivity and competence in relation to the nine protected characteristics as defined by the Equality Act 2010. In addition, the Trust has identified Learning Disabilities as an additional tenth protected characteristic. If you, or any other groups, believe you are disadvantaged by anything contained in this document please contact the Equality and Diversity Lead who will then actively respond to the enquiry.

21. MONITORING COMPLIANCE AND EFFECTIVENESS

Overall monitoring will be by the Trust Board.

21.1 As described within the procedure outlined in this document, the Learning and Development Team will monitor and record attendance at all training events by way of attendance sheets and recording of attendance on the Electronic Staff Record. Each month the Learning and Development Team will provide Heads of Division with a Compliance/Non Compliance report of mandatory training activity within the last month.

21.2 Non Compliance issues will be followed up by Managers at a local level and will ensure staff are booked onto the next available course. The Workforce Group will be provided with a report of non-compliance and subsequently assurance where non-compliant staff have completed the next available course. The Workforce Group will escalate issues relating to persistent non compliance to the Workforce Governance Group and will monitor the implementation of further action.

22. COUNTER FRAUD

22.1 The Trust is committed to the NHS Protect Counter Fraud Strategy – to reduce fraud in the NHS to a minimum, keep it at that level and put funds stolen by fraud back into patient care. Therefore, consideration has been given to the inclusion of guidance with regard to the potential for fraud and corruption to occur and what action should be taken in such circumstances during the development of this procedural document. Non compliance with mandatory training requirements may result in investigation and possible disciplinary action.

23. RELEVANT CARE QUALITY COMMISSION (CQC) REGISTRATION STANDARDS

23.1 Under the Health and Social Care Act 2008 (Regulated Activities) Regulations 2014 (Part 3), the fundamental standards which inform this procedural document, are set out in the following regulations:

Regulation 12: Safe care and treatment

Regulation 15: Premises and equipment

Regulation 17: Good governance

Regulation 18: Staffing

Regulation 20: Duty of candour

17.2 Under the CQC (Registration) Regulations 2009 (Part 4) the requirements which inform this procedural document are set out in the following regulations:

Regulation 11: General

23.2 Detailed guidance on meeting the requirements can be found at http://www.cqc.org.uk/sites/default/files/20150311%20Guidance%20for%20providers%20on%20meeting%20the%20regulations%20FINAL%20FOR%20PUBLISHING.pdf

24. REFERENCES, ACKNOWLEDGEMENTS AND ASSOCIATED DOCUMENTS

24.1 **Cross reference to other procedural documents**

Annual and Special Leave Policy

Equality and Diversity Policy

Induction (Corporate and Local) Policy

Mandatory Training Matrix (Training Needs Analysis)

Professional Registration Policy

Risk Management Policy and Procedure

Risk Management Strategy

Staff Travel and Expenses Policy

Training Prospectus

All current policies and procedures are accessible in the policy section of the public website (on the home page, click on 'Policies and Procedures'). Trust Guidance is accessible to staff on the Trust Intranet.

25. APPENDICES

25.1 For the avoidance of any doubt the appendices in this policy are to constitute part of the body of this policy and shall be treated as such. This should include any relevant Clinical Audit Standards.

Appendix A	Learning Contract
Appendix B	Application for External Study Leave
Appendix C	Application for External funding
Appendix D	Flow Chart for Mandatory Training

APPENDIX A

LEARNING CONTRACT

In order that you comply with your contractual obligations with mandatory training and that you can make the most of your learning we ask you to work within the Learning Contract:

Responsibilities of staff

- take responsibility for your development, ensuring mandatory training requirements are undertaken and remain in date
- make full use of training in your local cluster area
- inform the Learning and Development Team of any special requirements for learning in a timely manner so that we can make every effort to accommodate any changes needed
- promptly communicate any cancellations to courses, ensuring alternative dates are booked for mandatory training
- complete any pre-course work
- attend courses they have booked
- arrive promptly for courses
- demonstrate a commitment and willingness to learn
- action plan and use the learning to improve their day to day work
- have identified a mentor, and/or arranged for a period of supervised practice / clinical placement, where necessary, to attain competence
- maintain a personal development portfolio
- Provide feedback to the Learning and Development team on courses through the evaluation process

Responsibilities of Managers:

- work in partnership with training managers to establish a systematic approach to identify and develop their staff

- undertake Staff Appraisals and produce Personal Development Plans in line with Trust Guidelines

- ensure all staff attend mandatory training

- follow up on any non attendance with staff

- encourage staff to take individual responsibility for their learning

- make full use of cluster training venues to optimise the efficient use of resources

- encourage and support staff to attend relevant training

- encourage staff to reflect on learning and apply their learning in the workplace through effective briefing and debriefing mechanisms

- release staff for agreed training programmes and minimise non attendance
- communicate promptly with the Learning and Development Team when cancelling course places. Try wherever possible to re-allocate the course place and ensure alternative dates are booked for mandatory training

PLEASE NOTE

Staff will be excluded from registering for Priority Business Needs training if they have not completed or booked onto their mandatory training.

Responsibilities of the Learning and Development Team:

- provide a learning environment, which supports all learners and their needs
- work with individuals, groups and managers to provide a positive learning experience which is relative to practice
- ensure programmes are delivered in a professional and stimulating manner
- ensure that training courses are delivered to schedule
- where possible give a minimum of 10 weeks notice of new course dates
- offer training programmes in a variety of locations and where possible through a range of media to enable flexibility and access to learning
- respond swiftly to changes in service need, strategic direction from individuals and groups
- to be professional in appearance and manner
- provide accurate compliance reports and training systems to support managers and staff

APPENDIX B

STUDY LEAVE APPLICATION FORM FOR EXTERNAL COURSES

NOTE: This form should not be used as an application for external funding

NOTE: All applicants who have Line Manager approval must book directly with the Provider. Once the course has been completed forward a copy of your certificate or e-mail to confirm your attendance to the Learning and Development Team so that your learning record can be updated to reflect this training.

Please Print:

Name:	
Job Title	
Work Base:	

Course Title:		**Course Date:**	
Name of Course Provider: (Please attach copy of course information)			

Has this training been identified in your Personal Development Plan? Yes / No

Please identify appropriateness and relevance of this course to your professional or team development.

………..

………..

I confirm the above details are correct to the best of my knowledge and that I have discussed this development need with my line manager, taking into account the benefits to the service / organisation.

I also confirm that all Trust Mandatory Training requirements are up to date.

I agree to share the learning received to relevant Trust staff as required.

Signature of Applicant ……………………………………………………….. Date:……………………………….

TO BE COMPLETED BY LINE MANAGER

I agree to release the above member of staff to attend on the specified date (s). I confirm all mandatory training requirements are up to date. I agree to staff member delivering training from learning gained for the benefit of all relevant staff.

Name: …………………………………………….. Signature: ……………………………………………………..

Job Title: ……………………………………………. Date: …………………………………………………….

Work Base: ……………………………………….

Somerset Partnership

Copies of this form should be sent to: Your Head of Division and Learning and Development, Priory House, Wells
Telephone Number: 01749 836649
Fax Number: 01749 836699
Email: Learning@sompar.nhs.uk

FUNDING APPLICATION FORM FOR EXTERNAL COURSES

Application No.	

APPLICATION PROCESS FOR APPLYING FOR EXTERNAL COURSES

1. Complete part 1(yellow) of the application form.
2. Forward to your Line Manager along with a copy of your Job Description, current Personal Development Plan (PDP), and Agreement for the Repayment of Course/Training Fees for them to complete part 2 (pink) of the application form
3. **Managers are required to provide a full and comprehensive statement of support linking this learning to the business plan and service development.**
4. The Line Manager forwards the application to Learning and Development Department
5. The application is reviewed at the monthly Somerset Partnership NHS Foundation Trust Workforce Group meeting.
6. Feedback is given on approval.

IMPORTANT INFORMATION

7. If you or your budget holder have already applied and paid for a course or that course has already taken place then the Learning and Development Department will not reimburse you.
8. Applications will not be considered without the name of the provider, the course date and the cost.
9. The Learning and Development Department is unable to grant funding for courses that require fees for more than one budget year. Applicants must reapply yearly.

PLEASE NOTE

- Applications for funding are approved at the monthly Somerset Partnership NHS Foundation Trust Workforce Group. Your application will be reviewed within one month of submission.
- Applications must be received 1 week before the Somerset Partnership NHS Foundation Trust Workforce Group meeting for funding to be considered.
- Do not commit to any training programmes before you have received approval as there is no guarantee that you will be funded for the course. In exceptional circumstances where a course is due to start imminently please forward your application with a covering e-mail detailing the date you require approval by and we will make every effort to review your application by the deadline although no guarantees can be given.
- Applications for funding for less than £50.00 or conferences should be forwarded to your Line Manager for approval from directorate budgets.
- Courses are unlikely to be funded if your mandatory training is not up to date.

CRITERIA FOR APPROVAL AT SOMERSET PARTNERSHIP NHS FOUNDATION TRUST WORKFORCE GROUP MEETING

Criteria below is considered by the panel to guide the decision making

- Job description and personal development plan enclosed
- Agreement for the repayment of course/training fees
- Completed all their mandatory training
- History of not attending or dropping out of courses
- Previous funding for other courses in past 2 years
- Essential to role
- Contributes to key organisational objectives of their work area
- High risk to the organisation if the training is not given
- Approved and supported by manager

PART 1 – APPLICANT TO COMPLETE

PERSONAL DETAILS		
Name:		
Position:		
Pay Band:		
Location:		
Contact Details:	**Tel:**	**E:mail:**
Line Manager:		
COURSE INFORMATION		
Course Title:		
**** Course Provider:**		
**** Date of Course:**		
**** Course Cost:**		
Duration:		
**** Applications will not be considered without the name of the provider, the course date and the cost.**		
How will the training contribute towards the organisational objectives of your work area?		
Details of any funding for external courses received in the past 2 years:		

Course Details		Amount:	
Course Details		Amount:	
Course Details		Amount:	

Signature:		**Date:**	

AGREEMENT FOR THE REPAYMENT OF COURSE/TRAINING FEES

PART 1

APPLICANT TO COMPLETE AND RETURN SIGNED WITH THE FUNDING APPLICATION FORM FOR EXTERNAL COURSES

PERSONAL DETAILS		
Name:		
Job Title:		
Pay Band:		
Location/Work Base:		
Contact Details:	**Tel:**	**Email:**
Line Manager:		
COURSE/TRAINING DETAILS		
Course Title:		
Course Provider:		
Course Date(s):		
Course Cost:		
Duration:		

DECLARATION

a **Withdrawal from a funded course.** Should I fail to complete the full course/training, I agree to repay to the Trust the full cost of the module/course.

I agree that the Trust may deduct any outstanding amount from my Salary.

	Signature	**Please Print Name**	**Date**
Applicant			
Line Manager			

cc Payroll, HR Department, Training Department, Applicant, Line Manager

PART 2 – MANAGER TO COMPLETE

MANAGERS SUPPORTING STATEMENT **Managers are required to provide a full and comprehensive statement of support linking this learning to the business plan and service development. If you DO NOT support this learning please do not forward this application form for consideration.**					
Is the training: (Please select ONE of the following)					
A mandatory requirement for the role (This is defined as 'any training that is deemed essential by law for the safe and efficient functioning of the Trust and/or the safety and wellbeing of the individual member of staff'.)					
Essential to achieving the business objectives in their work area (This is defined as 'training which is essential in order to ensure the Trust is able to meet and exceed its goals and targets'.)					
Continuous professional development (This is defined as 'any training and development activity which builds on professional skills and competencies and improves performance at work.'					
Career development (This is defined as 'any training and development activity which supports individuals to manage their careers and to retain people with the aptitude and ability to meet future organisational needs'.					
If the candidate is unsuccessful in achieving the funding for training what risk does this pose to the Trust:					
High		Medium		Low	
If high or medium risk please give details:					
Managers supporting statement					

Please ensure before sending to the Learning and Development Department that a current Job Description, Personal Development Plan and a signed Agreement for the Repayment of Course/Training fee forms are attached to this application

Signature:		**Date:**	

APPENDIX D

The **Mandatory Training Matrix** is a live document and subject to change. Staff/Managers should check for Training requirements accessible on the L&D section of the Trust Intranet together with further detail in the **Training Prospectus**