

Learning and Development Policy

Policy information

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Employment

Supersedes:

Not applicable

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Approval information

Approved by:

People, Organisational Development and Culture Committee (PODCC)

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15/11/2025

Summary of document

This document communicates our HDUHB policy on learning and development for all staff groups and signposts to relevant processes, procedures and other associated policies.

Scope:

This policy applies to all employees but please note medical and dental employees have their own policy in relation to [Study Leave](#). – opens in a new tab.

To be read in conjunction with:

- 045 Performance Appraisal and Personal Development Plan Policy– archived and superseded by 1103 [Performance Management Policy](#) – opens in a new tab.
- [100 Organisational Induction Policy](#)– opens in a new tab.

- [201 All Wales Disciplinary procedure](#)– opens in a new tab.
- [203 All Wales Capability Policy](#)– opens in a new tab.
- [238 Information Governance Framework](#)– opens in a new tab.
- [248 Standards Of Behaviour Policy - Incorporating Declarations of Interests, Gifts, Hospitality and Sponsorship](#)– opens in a new tab.
- [275 Secure Transfer of Personal Information Policy](#)– opens in a new tab.
- [291 Personal Employee Records Management Policy](#)– opens in a new tab.
- [347 Corporate Records Management Policy](#)– opens in a new tab.
- [443 - AW Pay Progression Policy](#)– opens in a new tab.
- [748 General Data Protection Policy \(workforce related employee data\)](#) – opens in a new tab.

Patient information:

Not applicable

Owning group:

Workforce and Organisational Development

Executive Director job title:

Lisa Gostling, Director of Workforce and Organisational Development

Reviews and updates:

1. New Policy approved 15/02/2011
2. Revised and approved 04/04/2013
3. Revised and approved 18/05/2017
4. Data Protection Act /General Data Protection Regulations 2016 or any subsequent legislation to the same effect – SECTION 21 added and approved 17/05/2018
5. Amendment to higher award level approved March 2018
6. Three yearly review – 15.12.2022
Reuploaded 31.10.2023 with reference to 045 PADR updated to new policy 1103 [Performance management policy](#) and slightly reformatted

Keywords

Training

Glossary of terms

CPD	Continuous/Continuing Professional Development
ESR	Electronic Staff Record
HUHB	Hywel Dda University Health Board
IMTP	Integrated Medium Term Plan
KSF	Knowledge and Skills Framework
L&D	Learning and Development
LNA	Learning Needs Analysis
PADR	Performance and Appraisal Development Review
ROI	Return on Investment

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Introduction

To help us give the best possible care and services, whatever our role, it is important that we continuously replenish our knowledge and develop our skills.

Our approach to learning means that all employees should be supported in developing confidence, skills, knowledge and independence throughout their employment with us. Whilst the beginning of our employment will contain a prescribed [Induction](#), – opens in a new tab - carefully designed to onboard us safely and effectively into our new roles; our ongoing development needs will be identified by mechanisms such as (but not limited to) the [1103 – Performance Management Policy](#) – opens in a new tab - process.

Policy statement

To achieve a learning culture, the Hywel Dda University Health Board (HDUHB) promotes continuous professional development (CPD) and provides access to learning & development (L&D) for employees at all levels so they can fulfil their potential and be responsive to the changing environment.

L&D within HDUHB is underpinned by the principles of the [Knowledge and Skills Framework](#) (KSF) – opens in a new tab - which lie at the heart of the career and pay progression strand of [Agenda for Change](#). – opens in a new tab -

Scope

This policy applies to all employees. Please note there is a dedicated policy, specifically in relation to [Study Leave for Medical and Dental Staff](#)– opens in a new tab -.

Aim

The aim of this policy is to ensure transparency and fairness in relation to accessing development opportunities and decision-making processes. It will also ensure that the investment in our workforce is prudent, sustainable, prioritised and aligned with the HDUHB service strategy and developments.

Objectives

The aim of this document will be achieved by the following objectives:

- Signpost to the relevant processes and support materials that underpin learning and development at HDUHB.
- Outline key personnel with responsibilities to ensuring the policy is implemented correctly and associated compliance requirements are met.

Policy

Purpose of learning and development

Understanding the purpose of learning and development is key when designing individual development plans and prioritising development activities. Purpose can be broadly categorised into four types:

- a) **Statutory** – This type of training is usually required by law or where a statutory body has instructed HDUHB to provide training based on specific legislation (i.e., the Health and Safety at Work Act 1974 and the Management of Health and Safety at Work Regulations 1999).
- b) **Mandatory** – Mandatory training is compulsory training that is determined essential by HDUHB for the safe and efficient delivery of services. This type of training is designed to reduce organisational risks and comply with local or national policies and government guidelines. Mandatory training will vary from role to role.
- c) **University Health Board Priority** – identified as an organisational need that is essential to delivering the agreed service strategy or in response to an inspection, or DATIX for example.
- d) **Continuous Professional Development** - this is the ongoing process of developing and maintaining professional skills for your current role or another HDUHB role you are aspiring to. CPD is often identified during an individual's PADR or during an organisational learning needs analysis.

Study Leave

For the purposes of this policy, Study Leave is defined as time away from normal duties for the purpose of undertaking formal or informal learning and development activity. A working day is defined as 7 ½ hours.

Unlike other policies, approved study leave is not pro-rata'd for part time employees. This is because course content is not usually reduced for part time employees. For more information please see the Study Leave Process – opens in a new tab.

The amount of paid study time must be agreed with the manager prior to application. No backfill should be used to support staff release. The maximum paid study leave that will be supported per year is 32 days, unless otherwise agreed with the Learning and Development Team.

Requesting Study Leave

Employees must ensure their statutory and mandatory training is compliant prior to making study leave requests for CPD. This ensures employees have the knowledge and skills to maintain a healthy and safe working environment for themselves, their patients and their colleagues, before engaging in any further development activities. Compliance can be checked via [ESR](#) – opens in a new tab -.

Figure 1 can help identify the correct process to follow when booking or requesting study leave.

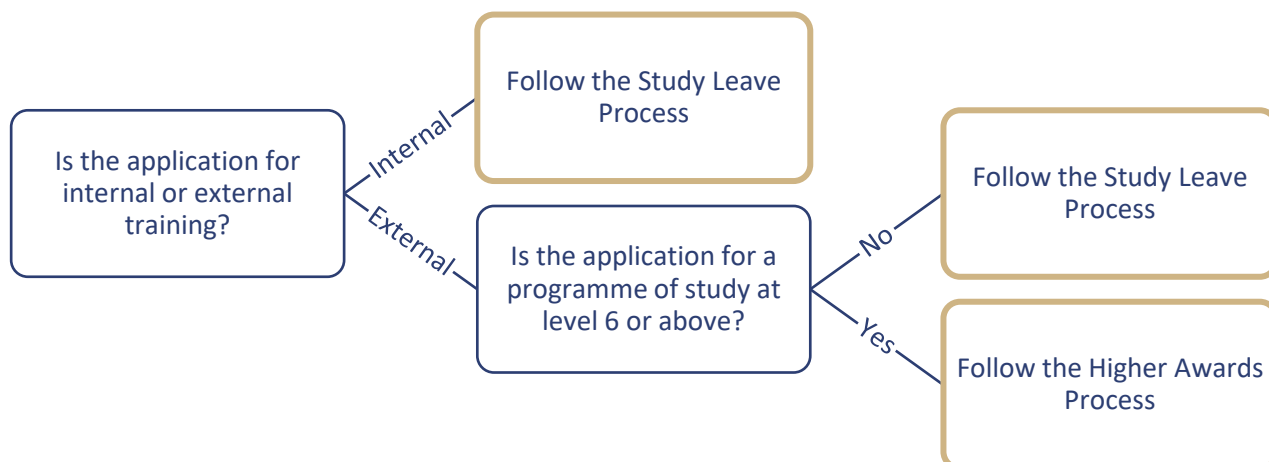


Figure 1 How to identify correct process for booking/requesting training

*The Study Leave process also applies to education and training for Trade Union representatives and overseas study.

Reimbursement of expenses

Employees must advise their line manager of any expenses likely to be incurred before applications are made. Reimbursement will be in line with our [Expenses Policy](#) – opens in a new tab.

Withdrawal of funding

In exceptional circumstances the organisation reserves the right to withdraw some or all of the funding for the continuance of approved study leave i.e. failure to complete the work within the prescribed framework, failure to complete the course or to attend in accordance with the requirements of the course.

Funding would not under any circumstances be unilaterally withdrawn.

Full discussions with senior colleagues, the applicant and the Assistant Director of Workforce and OD (OD)/ Assistant Director of Nursing (Workforce)/ Assistant Director of Therapies and Health Science would take place prior to the notice of withdrawal of funding being issued. The final decision rests with the budget holder.

Trade Union education and training

Applications for study leave by Trade Union representatives will need to be made via the usual [Study Leave Process](#) – opens in a new tab -.

Leave with pay may be granted to recognised Trade Union Representatives for Trade Union development activities. This must be agreed by the Manager/Department Head/Professional Head of Service or County Director.

Overseas study leave

Study Leave process applies however the application form should be at least 3 months in advance and should be approved by an Executive Director of the HDUHB.

Funding

The [Study Leave Process](#) – opens in a new tab - and [Higher Awards Process](#)– opens in a new tab - include applications for funding.

If an application is approved, HDUHB will fund 100% of course fees, books, expenses and any other reasonable expenditure.

The applicant and the budget holder are required to sign a training agreement before study commences which include the fee repayment requirement.

Fee repayment requirement

Where a contribution of the fees for an individual's study or higher award have been paid by HDUHB; the employee will be required to pay back a proportion of the amount received if they leave the employment of the HDUHB within a specified period of completion:

Leaving HDUHB employment	Fees pay-back
Before completion of qualification/programme of study	100%
Within 1 year of completion	75%
Between 1 and 2 years of completion	50%
More than 2 years after completion	0%

Table 1 Repayment schedule

Whilst it is unusual for employees to embark on a course and then to withdraw immediately or not to make any attempt to progress, this can happen and, depending on the situation, the HDUHB reserves the right to request employees to repay the fees already incurred.

Each case will be reviewed individually and agreed by the Workforce Education and Development Team; the individual's General Manager (or equivalent) and the appropriate Executive Director. The individual may appeal to the Executive Director should they not agree the outcome of the decision. Individual decisions will be made in respect of re-payment in full or in instalments.

Each individual will be required to sign a training agreement prior to the commencement of such a course which outlines the above; failure to sign the agreement will bar the individual from accessing HDUHB funding for the course.

Refer to the Study Leave and Higher Awards process for further information.

Commercial sponsorship for attendance at courses and conferences

Refer to the [Standards of Behaviour Policy](#)– opens in a new tab -.

Any sponsorship/hospitality related to Post Graduate Medical Education must be approved and signed off by the Associate Medical Director who has responsibility for Post Graduate Education and Training.

Any sponsorship/hospitality related to other learning and development activity must be approved and signed off by the Director of WF&OD who has responsibility for organisational learning, education and development.

Responsibilities

Chief Executive

As Accountable Officer, the Chief Executive has overall responsibility for ensuring the HDUHB has appropriate written control documents (WCDs) in place. These WCDs must comply with legislation, meet mandatory requirements, and provide services that are safe, evidenced-based, and sustainable.

Hywel Dda University Health Board

The HDUHB has ultimate responsibility for the continuous development of its employees ensuring that the provision of care and related services for patients are safe and clinically effective. As such they are responsible for monitoring equitable access to learning and development, ensuring adequate resources to deliver required interventions in line with the organisational strategy and IMTP.

Director of Workforce and Organisational Development

The Director of Workforce and Organisational Development is responsible for ensuring provision and delivery of the learning and development function across the organisation. They will provide adequate resources to support learning and development, including statutory and mandatory requirements. They will ensure progress is being made against the organisation's Education Strategy.

Workforce Education and Development Service

Workforce Education & Development (WE&D) will lead the effective implementation of this policy and promote good governance. They will manage centralised funds designated for HDUHB wide L&D activities and monitor and report on organisational training compliance. They will manage centralised processes such as Study Leave and Higher Awards and provide advice and guidance to budget holders, Directors and Heads of Service. WE&D will liaise with local education providers to build relationships and develop training programmes to reflect service and patient needs.

Directors and Heads of Services

With primary responsibility of service delivery and departmental budgets, Directors and Heads of Services will be responsible for making sound and transparent decisions in relation to this policy. They will monitor access to L&D activities across their service and attempt to remedy issues ensuring equitable access.

Line managers

Line managers will support all their direct reports in the effective design and implementation of their personal development plans, ensuring they are deliverable within the agreed timescales. They will actively seek to address barriers to development and ensure organisational training compliance requirements are met. This includes keeping in touch with those on long term

leave (I.e. maternity leave) and providing access to keeping in touch days to support ongoing professional development. Line managers will notify the L&D Team of other barriers such as low-level literacy and numeracy skills, so the department can seek to support those individuals appropriately. Line managers will comply with recording and reporting requirements that will support the effective monitoring of this policy. They will also comply with other organisational policies and processes associated with this policy.

Individuals

Everyone is responsible for continually assessing their own knowledge and skills against the needs of their role and their service. They will actively seek out cost effective opportunities for themselves and be forthcoming in their requests for development. Employees will notify their line manager and training provider if they are unable to commence or continue with their training/studies. They will ensure they are always compliant with organisational requirements and professional standards associated with their role (where applicable). Individuals are expected to be open and honest regarding barriers they may face for the organisation to provide appropriate support. Individuals will comply with recording and reporting requirements that will support the effective monitoring of this policy.

Local trainers

Many trainers work within the corporate, operational and service structures/teams and as such, have a responsibility for the translation of this policy at all levels. Additionally, they must ensure that any training opportunities developed locally reflect the strategic priorities and are in line with professional standards (where applicable). Local trainers will comply with recording and reporting requirements that will support the effective monitoring of this policy.

References

[Agenda for Change](#) – opens in a new tab -

[Credit and Qualifications Framework \(CQFW\): overview](#) – opens in a new tab -

[Higher Awards Process](#) – opens in a new tab -

[Knowledge and Skills Framework](#) – opens in a new tab -

[Study Leave Process](#) – opens in a new tab -