

**NHS WALES**  
**Local Health Boards**

**STUDY LEAVE POLICY AND PROCEDURE**

**1. Introduction and Scope**

Employees are encouraged to take advantage of training and development opportunities which are relevant to their jobs and personal development. Applications should be made under this procedure to obtain agreement to undertake study leave and for approval of expenses to be reimbursed. The guidance set out is based on that contained in the relevant Whitley Council Handbooks. There is also discretion in some circumstances for level of funding to be negotiated. This procedure will apply to all staff.

**2. Definition of Study Leave**

- Courses of vocational training;
- Attendance at short courses, workshops etc. run by training providers;
- Attendance at professional courses and meetings;
- In service training, eg management, IT, preparation for retirement.

NB Accredited TU representatives are legally entitled to appropriate time off (study leave) with pay to attend relevant and recognised courses.

**3. The Role of the Manager**

Ultimate responsibility for staff development lies with the Chief Executive. Line Managers should identify the performance objectives for their department/directorate and individual development needs should be considered in this context. Following individual performance review, where individual training needs are identified, these should be incorporated into a personal development plan for the individual. It is then necessary to determine where and how the training can be provided. It is important to recognise that much training can be provided on site utilising the organisation's own resources. Where training will be provided by an external provider or off-site, applications for approval of funding should be made using the form attached to this procedure (Appendix A).

**4. Criteria for Approval**

All Applications will be judged against the following criteria.

- The course, programme or workshop is identified in the individual's development plan and is deemed to be of benefit to the individual, the service and the organisation.
- The cost of the training is not excessive in relation to its value to the organisation.
- The individual can be released in order to attend.

- Consideration will be given to amount of study leave previously granted to the individual.
- Development outcomes to be agreed prior to attendance and evaluation can be obtained.

Study leave and expenses will only be agreed where the above criteria are met.

## **5. Level of Contribution by Employer**

The Whitley Councils are specific on some levels of expenses to be reimbursed, while others are discretionary. It is expected that senior staff would contribute to programmes that would benefit them personally as well as professionally.

Appendix B provides a table summarising levels of support.

## **6. Procedure for application for Study Leave and Expenses**

Applications should be made on the approved form (See Appendix A)

Applications should be made and approved prior to attendance on the training.

The signature of the relevant Chief Executive (or approved Deputy) will be required before approval can be finalised.

The individual will receive a copy of the Form; a copy will be retained on their local personnel file.

Payroll will also need to be provided with a copy so that the agreed reimbursement can be made once individuals submit the expenses claim form, attaching appropriate receipts.

Reimbursement will normally be made through the payroll. However, on some occasions, course fees/travel warrants may be purchased locally and this is indicated on the application form.

The Flow chart in Appendix C summarises the process.

## **7. Elements for Reimbursement**

This will vary according to the training identified but could include:

- Travel expenses, including tube fares and parking.
- Course Fee or a percentage;
- Examination fees;
- Book allowance
- Leave – paid or unpaid.

## APPENDIX A

### NHS WALES – LOCAL HEALTH BOARDS APPLICATION FOR LEAVE AND EXPENSES TO ATTEND A TRAINING COURSE/CONFERENCE

<b>Name of Applicant:</b>	
<b>Post Held:</b>	
<b>Employer/Location:</b>	

<b>Name of Course/Conference:</b>	
<b>Venue:</b>	
<b>Date and duration:</b>	

<b>Reason for Application:</b>	
<b>This training is linked to objective in my personal development plan:</b>	<b>YES / NO</b>
<b>Date of IPR:</b>	

#### Estimated Expenses

	Requested (completed by individual)	Approved (completed by Authorised Officer)
<b>Travel Expenses:</b> (at public transport rates for private vehicle/lease care rate for lease car)		
<b>Course Fee</b>		
<b>Other Expenses.</b>		
<b>TOTAL:</b>		

#### Study Leave Granted in Last 12 months (give details)

I undertake to forward a copy of all certificates following successful completion of course. Should I fail to take part (other than through certificated illness) I will reimburse my Employer for costs incurred.

Individuals who leave the employment of NHS Wales prior to completion of an agreed course of study for which funding has been agreed may be required to repay all or part of fees already paid on a pro rata basis.

**SIGNATURE OF APPLICANT** \_\_\_\_\_

#### REASON FOR DECISION - comments (re level of expenses to be approved)

**APPROVED/ NOT APPROVED**

**Signed (Line Manager)**

**APPROVED/ NOT APPROVED**

**Signed (Chief Executive)**

*Please forward a one copy of the form to Payroll; one copy to be entered on local Personnel file; Original to be returned to Applicant*

## **APPENDIX B**

### **GUIDANCE ON APPROVED EXPENSES REIMBURSABLE UNDER STUDY LEAVE PROCEDURE**

**FEES** Up to 100% where training is statutory or considered essential to the job.

Where training is considered beneficial to individual and job reimbursement at a rate between 50-100% may be agreed. Normally 75% of professional training is reimbursable.

**LEAVE WITH PAY** Payment for days not worked as a consequence of attending a course may be granted.

Paid or unpaid leave for the purpose of exam revision will be left to the discretion of the manager.

**TRAVELLING  
EXPENSES**

Public transport rate for individuals using their own vehicle.

Lease car rate for lease car users.

Groups of staff attending same course should travel together where convenient with the driver claiming for passengers at appropriate rate.

Rail Fares at standard rate with staff expected to take advantage of cheaper fares wherever possible.

**SUBSISTENCE** Will be approved in accordance with relevant Whitley Council regulations and rates.

**BOOKS** Where books need to be purchased to undertake a course of professional training or further degree a percentage may be reimbursed. Books up to £50 may be approved in any one year.

INDIVIDUALS WHO LEAVE THE LOCAL HEALTH BOARD PRIOR TO COMPLETION OF AN AGREED COURSE OF STUDY FOR WHICH FUNDING HAS BEEN AGREED MAY BE REQUIRED TO REPAY ALL OR PART OF FEES ALREADY PAID ON A PRO RATA BASIS.

#### **Administrative Arrangements**

Once approval has been obtained, the individual will be responsible for the necessary administrative arrangements including booking themselves onto course and hotel and arranging transport and accommodation.

Payment may be made in one of the following ways:

1. Paid by the individual and reclaimed on an expense form through Payroll.
2. Paid by a cheque from the employer when registration form is forwarded.
3. Paid by the employer on receipt of an invoice from the Course Organiser or Hotel.

Where requested the Employer may pay the full fees and make arrangements to deduct the employee's contribution from salary, where it has been agreed the employee will contribute to a course leading to a qualification.

### **Reimbursement of Travel and Subsistence and other Expenses**

#### **Summary of Whitley regulations.**

The relevant expense form should be completed and signed by the applicant and authorised by designated approving officer.

- details of mileage and passengers should be entered, together with dates and times.
- receipts must be attached for course fees, exam fees, books, hotel accommodation, tickets etc.
- public transport mileage rate for courses and conferences is 23p per mile for all staff.
- lease car users will be reimbursed at usual lease car rate.
- overnight accommodation will be reimbursed up to a maximum of £55 per night.
- a 24 hour meal allowance may be claimed (time of absence on course to be recorded on the claim form). This is currently £20.
- if accommodation/meals included in the course fee, an incidental expenses allowance of £4.20 per 24 hours may be claimed.
- staying with relatives/friends will be reimbursed at £25 per night. The 24 hour meal allowance is not payable in addition to this.

## **APPENDIX C**

### **FLOWCHART OF STUDY LEAVE APPLICATION PROCEDURE**

**Individual development needs agreed at IPR with Managers**

**Suitable development opportunity sourced and costed**

**Study Leave Application Form (Appendix A) completed by applicant with details of dates, training venue, course fee and expenses sought.**

**Form approved by Line Manager and Chief Executive with details of any local agreement made regarding funding entered in the comment box and funding approved and initialed.**

**One copy of the completed form passed to Payroll, who will reimburse following receipt of a completed expense form.**

**One copy of form returned to individual**

**One copy retained for local personnel records.**

**Where applications are not approved, the applicant will be informed of the reason by their local manager and may appeal using the grievance procedure.**