

1. Introduction and Who Guideline applies to

The aim of this guideline is to provide a clear process for staff applying to undertake a module, programme or course funded by either CPD or WDF monies. This guideline will be replacing: Study Leave for Learning Beyond Registration (LBR) UHL Guideline. B27/2015

Continuing Professional Development Funding (CPD) is available to Nursing associates, registered nursing, midwifery and allied health professionals in the NHS (in England). This funding settlement has been secured and agreed with HM Treasury specifically as part of the Department of Health and Social Care's negotiations for the NHS workforce in England. This funding is not available for nursing, midwifery and allied health professionals in social care, local government or in other sectors outside of the NHS in England.

The CPD funding will provide an individual development fund for frontline clinical professionals to:

- Equip them with new clinical skills to enhance the care they provide to patients and develop their careers
- Support staff in moving between sectors, for example by enabling nurses and AHPs in hospitals to move to new roles in primary care and community care, supporting improved primary care access and out of hospital care
- Support the maintenance of their continuing professional registration by helping them to meet requirements from their professional regulators

The investment for CPD is for a three year period 2020 to 2023, with one third of this money being released each year.

University Hospitals of Leicester (UHL) CPD Credits is a creative and innovative way to ensure that all staff can benefit from the national CPD funding initiative and recognises UHL as a credible education provider

- **How does UHL CPD Credits work:** Any training or education listed in the UHL Prospectus will allocated a value in the form of CPD credits. You can exchange part/all of your CPD allocation into UHL CPD Credits to attend any training or education detailed in the prospectus. (£333.33 is the equivalent of 333.33 UHL credits)

Workforce Development Funding (WDF) has a different focus to that of the CPD funding, and should be invested in activities which are driven by employer intent to target the improvement and transformation of care delivery, requiring scale of education and training intervention.

The WDF allocation is based on current workforce headcount, for all non-medical registered and non-registered, clinical and non-clinical staff

CPD and WDF monies cannot be used for:

- Salaries or backfill
- Capital expenditure
- Travel and subsistence
- Professional registration fees
- Statutory & Mandatory training

This guideline should be read in conjunction with the UHL Study Leave (non-mandatory training) Policy for Agenda for Change Staff (Trust ref B32/2004).

2. Guideline Standards and Procedures

2.1 Training Needs Analysis (TNA)

- a) The Clinical Management Groups (CMGs) should identify the modules/courses required, to meet current and future service delivery, to be included in TNA
- b) The CMG to determine the process for identifying priorities within the CMG, and individuals to be supported in undertaking module(s) / course(s).

2.2 Application

- a) The application process is detailed in the attached flowchart (Appendix A)
- b) The individual's training need should be identified as part of the appraisal process, or required as part of a service/transformation plan
- c) The individual's Line Manager must ensure that the individual's application meets service needs, workforce plans and the individual's Personal Development Plan (PDP)
- d) The individual must complete the UHL Application for Agenda for Change Study Leave Application Form, available on INsite:

<http://insitetogether.xuhl-tr.nhs.uk/pag/pagdocuments/Study%20Leave%20for%20Agenda%20for%20Change%20Staff%20UHL%20Policy.pdf>

- e) Individuals applying for funding must discuss their requirements with their CMG Education & Practice Development (E&PD) Lead to secure part/full funding of study
- f) Individuals applying for HEI accredited modules/programmes should meet with their CMG E&PD Lead to ensure academic suitability and provide guidance/support, if required
- g) Once the Line Manager has approved the study leave application and CMG E & PD has approved the funding the individual must complete WDF & CPD Request for Requisition to be Raised Form (Appendix B)
- h) Once the Purchase Order (PO) Number is obtained the individual, can apply for the module/course (by hard copy or electronically), detailing the PO number on the application finance section. In some cases it may be possible to apply for the module/course before a PO is obtained. If this is the case the individual needs to inform the module/course provider of their PO at the earliest opportunity.

2.3 Funding Confirmation

The CMG WDF/CPD Lead will confirm the funding source on the Requisition to be Raised Form

2.4 Module/Course completion

All staff undertaking module will be expected to submit assignments, module work and/or sit examinations as part of the module/course, as required.

2.5 Academic Offences

Refer to Appendix C

2.6 Non-Submission of assessments / failed assessments

Refer to Appendix D

2.6 Results

For all CPD/WDF funded academic modules, the individuals should inform both their line manager and CMG Education and Practice Development Lead of that result.

2.7 Maintaining Records of all Staff on LBR Modules

The CMG Education and Practice Development Team will maintain a training spreadsheet of staff accessing CPD/WDF monies.

3. Education and Training

There are no education requirements of the implementation of this guideline; line managers can seek advice from Education and Practice Development Teams

4. Monitoring Compliance

What will be measured to monitor compliance	How will compliance be monitored	Monitoring Lead	Frequency	Reporting arrangements
All CMG / Corporate Directorates to report quarterly on anticipated, committed and confirmed CPD/WDF spend	Report to Deputy Chief Nurse	WDF/CPD Managers	Quarterly	
Anticipated, committed and confirmed CPD/WDF spend	HEE reports	WDF/CPD Managers	Quarterly	
CPD/WDF report	Report of Deputy Chief Nurse	WDF/CPD Managers	Annual	

5. Supporting References (maximum of 3)

UHL Study Leave (non-mandatory training) Policy for Agenda for Change Staff (Trust ref B32/2004)

6. Key Words

Workforce Development Funding, WDF, Continuing Professional Development, CPD, study leave, non-submission, academic offence

CONTACT AND REVIEW DETAILS	
Guideline Lead (Name and Title) Jane Lawrie, Nurse Education & Practice Development Lead (Practice Learning) Linda Martin, AHP Education & Practice Development Practitioner	Executive Lead Chief Nurse
Details of Changes made during review: <ul style="list-style-type: none">• Rewrite of Guideline to reflect changes in HEE Workforce Development Funding	

APPLICATION PROCESS FOR WDF & CPD MODULES/COURSES

NOTE: Any applications outside of this process may not be supported / funded

WDF MANAGERS (Linda Martin & Jane Lawrie)

In discussion with CMG WDF Leads to review WDF TNA, monitoring application status, expenditure & liaise with providers
Updates WDF / CPD database and liaises with HEE**CMG HEAD OF NURSING / HEADS OF OPERATIONS**

HoN in discussion with their Education Lead, to identify the modules/courses, including no of places, required to meet current and future service delivery, and supporting CPD.
For all non-medical registered and non-registered, clinical and non-clinical staff

CMG HEADS OF NURSING / OPERATIONS & CMG EDUCATION LEADS

To inform staff off WDF/CPD application process and invite expressions of interest

INDIVIDUAL

To discuss undertaking module/course with line manager

NB: Training/study needs should be identified during appraisal (PDP)

If supported complete UHL Study Leave Application Form for WDF-CPD Modules/Courses

LINE MANAGER & BUDGET HOLDER / CMG EDUCATION LEAD

To sign off UHL Study Leave Application Form for WDF/CPD Modules/Courses

CMG EDUCATION LEADS

Interview staff who have expressed an interest in a HEI accredited module to ensure academic suitability
All successful staff to be placed on waiting list, pending confirmation of funding
Feedback to CMG HoN on outcome of interviews
Collect approved UHL Study Leave Application Form from individuals

UHL WDF LEAD (Eleanor Meldrum)

Confirm UHL WDF/ Allocation

CMG HEAD OF NURSING & CMG EDUCATION LEAD

To prioritise allocated funding

Identify staff to be supported, ensuring this meets service needs, workforce plans & the individual's PDP
Inform staff of outcome and options for unsuccessful staff

INDIVIDUAL

Complete WDF & CPD Requisition Form. Send to Centreforclinicalpractice@uhl-tr.nhs.uk

Once PO received complete application for module/course and add PO number and invoice details:

University Hospitals of Leicester NHS Trust, Accounts Payable, Leicester Royal Infirmary, PO Box 189, Infirmary Square, Leicester LE1 5WP or email PDF invoice to accountspayable@uhl-tr.nhs.uk (if required CMG Education Lead to arrange for UHL WDF/CPD Lead authorisation)

CORPORATE NURSING EDUCATION TEAM ADMINISTRATORS

Raise requisition on CEDAR and inform applicant of PO Number. GRN order on CEDAR.
Update WDF/CPD database held on Nursing Competencies shared drive

CMG EDUCATION LEADS

To confirm individuals enrolment/attendance on module/course on WDF/CPD database on shared drive

WDF & CPD – REQUEST FOR REQUISITION TO BE RAISED

Complete form below and return to Centreforclinicalpractice@uhl-tr.nhs.uk
If not completed in full, the form will be returned to you and will delay the application process

Name	Post
Email	Assignment No
Service / Ward	CMG

If more than one person is applying for the same course/module, only one form needs to be completed by the Education Lead, and additional staff details completed overleaf*

Course / Module Title	
Date(s)	*No of places required
Venue	
Provider (including address)	
Email	Contact No
Cost	VAT included/ exempt Yes / No
Has place been provisionally booked Yes / No	Application / Student No

CMG WDF / CPD Lead Approval

Name	Signature
Payment Method (please tick option below)	Funding WDF / CPD
Petty Cash	<input type="checkbox"/> <i>Individual pays for course fees (up to £50) claims back via petty cash</i>
Payment Request Voucher	<input type="checkbox"/> <i>Individual pays for course fees (over £50) claims back via PRV OR PRV used for urgent payment of course fees</i>
Purchase Order No & Invoice	<input type="checkbox"/> <i>The Corporate Nursing admin team raise a requisition on CEDAR to obtain Purchase Order No and arrange authorisation of payment.</i> Once you receive confirmation of the Purchase Order Number, you can apply for the course/ module. The training provider will need to invoice the Trust for payment, complete the invoice address on the application form: University Hospitals of Leicester NHS Trust, Accounts Payable, Leicester Royal Infirmary, PO Box 189, Leicester LE1 5WP or email PDF invoice to accountspayable@uhl-tr.nhs.uk

If you require a variation or receive any queries from the Education Provider regarding payment of fees, please contact Jane Lawrie (hilary.j.lawrie@uhl-tr.nhs.uk) or Linda Martin (linda.martin@uhl-tr.nhs.uk)

For Office Use

Requisition Number		Purchase Order Number		Date GRN'd	
Comments					

Name	Post
Email	Assignment No
Service / Ward	CMG
Name	Post
Email	Assignment No
Service / Ward	CMG
Name	Post
Email	Assignment No
Service / Ward	CMG
Name	Post
Email	Assignment No
Service / Ward	CMG
Name	Post
Email	Assignment No
Service / Ward	CMG
Name	Post
Email	Assignment No
Service / Ward	CMG
Name	Post
Email	Assignment No
Service / Ward	CMG
Name	Post
Email	Assignment No
Service / Ward	CMG
Name	Post
Email	Assignment No
Service / Ward	CMG
Name	Post
Email	Assignment No
Service / Ward	CMG
Name	Post
Email	Assignment No
Service / Ward	CMG
Name	Post
Email	Assignment No
Service / Ward	CMG

Academic offences (e.g. plagiarism)

Plagiarism can be defined as the significant use of other people's work and the submission of it as though it were one's own in assessed coursework (such as dissertations, essays, experiments etc).

This includes:

- Copying from another student's work
 - Copying text without acknowledgement
 - Downloading information and/or text from the internet and using it without acknowledgement
 - Submitting work and claiming it to be your own when it has been produced by a group
 - Submitting group work without acknowledging all contributors.
- a) The individual and Trust WDF/CPD Lead will be advised of any alleged / proven academic offences via the HEI in writing and the individual should inform their line manager.
- b) The Line Manager (where required the Education and Practice Development Lead) will meet with their staff member to discuss the offence and what action and support is required from a practice perspective. The meeting will be recorded as a file note and copied to the Head of Nursing/Midwifery or Head of Service/Operations who will decide if further action or disciplinary investigation is required.

Non submission of assessment/failed assessments (refer to section 5.11 of Allocation of Study Leave (non mandatory training) for Agenda for Change Staff Policy and Procedures) (Trust Ref B32/2004)

- a) The Line Manager will meet with the individual who has not submitted or failed their assessment to discuss the University Re-submission Policy and what support is required from a practice perspective. This meeting may involve a representative from the University, depending on individual circumstances. A note of the meeting and outcome will be recorded as a file note and copied to the Head of Nursing/Midwifery or Head of Service (or Director for Corporate Directorates).
- b) In agreement with the individual, the Line Manager will discuss the possibility of temporarily withdrawing study leave for non-mandatory training and development whilst they are working towards re-submitting academic work. This action may only be required if the extenuating circumstances (work or personal) that were impacting on the individual's ability to submit, have not been resolved. Therefore, the individual may agree that to commence additional education or training may be detrimental to both themselves and the service.
- c) The progress of the individual made towards re-submitting work will be monitored by the Line Manager until it can be confirmed that academic work has been submitted or clinical assessments completed.
- d) If an individual fails to re-submit on a second occasion and the line manager has not been informed of any mitigating circumstances, further study leave for other modules (or non-mandatory training and development) will be withdrawn immediately. The individual will be informed of this decision in writing. The Line Manager and Head of Nursing/Midwifery or Head of Service will then meet with the individual to confirm the reasons for non-submission and to agree an appropriate course of action to ensure that the individual achieves the objectives of their learning contract. Should the outcome of the meeting be an agreement for the individual to retake the module/ course then an action plan will need to be put in place.
- e) If an individual fails the module/course after the second attempt the Line Manager and Head of Nursing/Midwifery or Head of Service will then meet with them to agree an appropriate course of action to ensure that they achieve the objectives of their learning contract. Should the outcome of the meeting be an agreement for the individual to retake the module/ course then an action plan will need to be put in place in conjunction with E&DP Lead and Practice Learning Lead (PLL).