



Business Services
Organisation

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Assistance to Study Policy

November 2022



Policy Development Overview

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1.0 Aim of Policy

The BSO wishes to encourage staff to undertake any training, development and education which is linked to the Strategic Objectives, Mission and Values of the organisation. BSO may offer support by way of finance and/or time off work.

This policy supports the requirement that all BSO staff must have an annual appraisal conversation and Personal Development Plan to identify development needs for which training, developmental and educational activity is required. Furthermore, there is an expectation that all employees should have at least 15 hours training per annum.

2.0 Scope of Policy

This Policy applies to employees of the BSO in relation to training, developmental and educational activity, inclusive of mandatory training.

3.0 Definitions

Training, Development and Education is defined as activity such as corporate mandatory training, an academic course, professional development programme, conference, event, e-learning course, on-the-job training, workshops, webinar or seminar that meets an identified development need.

3.1 Activity

Such activity must be:

- Mandatory: by way of statute, corporate, contract or profession; or
- Professional: substantially linked to the work of the member of staff currently or in the near future; or
- Personal: activity undertaken which will enhance long term career progression and personal growth, and in which Mandatory and Professional activity do not apply; or
- Other: For example, a conference or activity substantially linked to the work of the member of staff currently or in the future.

3.2 Activity Providers

Providers of the above activity include:

- Internal BSO directorates
- HSC Leadership Centre
- HSC Clinical Education Centre
- Other HSC providers
- Other public sector providers
- External providers

3.3 Support Arrangements

Support arrangements may include:

- Payment/Reimbursement in full or part for course or programme fees
- Payment/Reimbursement of expenses incurred
- Time off to attend training
- Time off in lieu
- Coaching/Mentoring

4.0 Responsibilities

4.1 Manager Responsibilities

Managers are expected to provide, when feasible, the necessary support to staff who wish to participate in training, education or development activity.

Managers should use this policy to aid decision making on training and development needs and requests.

Managers are expected to enable staff to identify training, development and educational needs and, where appropriate, when support may be given to staff laid out in [Section 5](#).

Determine appropriate support for staff taking account of the following;

- Relevance to the BSO's Objectives and Values;
- Relevance to the individual's present work responsibilities, near future work responsibilities or current development need;
- Previous training support given;
- Other development needs and requests from other team members;
- Feasibility of the individual's commitment to undertake and complete the course of training or study;
- If a staff member is in a temporary contract which is due to expire;
- Satisfactory probationary period;
- The overall cost;
- The benefits of the training on the individual and team;
- The length of the course of training or study; and
- The needs of the service.

If a manager is unable to facilitate an application in whole or in part, they should explain the reason for their decision in writing at the time.

Where approval is given Management must advise of any liability for non-completion of a course or non-attendance at an event (see [Section 11](#)).

Approval to complete additional Professional or Personal Development will only be granted if all Corporate Mandatory Training is up to date.

4.2 Employee Responsibilities

Individual employees have a responsibility to:

Participate and complete all mandatory training.

Identify on an on-going basis training, developmental and educational needs which will enhance individual effectiveness and improve organisational performance.

Seek approval from their line manager for support for training, developmental or educational activity prior to the event/training commencing. Employees should provide their manager with all relevant information in order to make an informed decision on which support, if any, is to be given.

The Assistance to Study Application eForm in [Section 16](#) must be completed, and submitted for each year of study. This form will be saved on the employee's personal file and on a HR Learning & Development database.

Requests for leave and/or expenses should normally be made at least 4 weeks prior to commencement of each academic year or event.

Understand and settle any liability for not fulfilling requirements under this policy non-completion of a course or non-attendance at an event (see [Section 11](#)).

5.0 Overview of Eligible Support for Training, Education and Development Events and Courses

All support outlined in [Section 3](#) above is at the discretion of the line manager and budget holder if necessary. Support will be awarded subject to the criteria laid out in [Section 4.1](#). The support mechanisms below are not entitlements and are subject to adjustment depending on the nature of the request.

Type of Development	Funding for course fees, registrations, conference fees & exam fees	Working Time off to attend (if within working pattern)	Costs for resources required e.g. books* <i>*See section 7(b)</i>	Expenses: Mileage and subsistence (need to be receipted)	Time off work: study leave for exam	Time off work: for sitting exam	Time off in lieu (if outside working pattern)
Mandatory	100%	100% Paid time to attend	All costs covered	100% mileage and subsistence rates	1-day study leave	0.5 day for exam	Yes
Professional (and work related; PG training)	Up to a maximum of 75%	100% Paid time to attend	All costs covered	100% mileage and subsistence rates	1-day study leave	0.5 day for exam	N/A
Personal (development)	Up to a maximum of 50%	50% Paid time to attend. Other 50% will be annual or unpaid leave	50% of cost up to a maximum of £100 per annum	50% mileage and subsistence rates	Annual Leave	Annual Leave	N/A
Conferences	100%	100% Paid time to attend	Not applicable (unless they are presenting)	100% mileage and subsistence rates	N/A	N/A	N/A
Other: HSC Courses (e.g. Leadership Centre)	100%	100% Paid time to attend	Not applicable (unless they are presenting)	100% mileage and subsistence rates	N/A	N/A	N/A
Other: work-related Seminars/webinars	100%	100% Paid time to attend	Not applicable (unless they are presenting)	100% mileage and subsistence rates if necessary.	N/A	N/A	N/A

6.0 Time off Work, Time off in Lieu, Study Leave & Exam Leave

There are four types of leave applicable under this policy:

- Time Off with pay
- Time Off in lieu
- Exam Leave
- Study Leave

Time off for academic or educational courses or programmes will not exceed the equivalent of one whole working day per week during the period of study.

Attendance at taught courses outside of normal working hours may not attract time off in lieu, overtime or other financial reimbursement **unless attendance comes under “mandatory” activity**. Staff cannot avail of time off in lieu for such courses.

Self-directed studying outside of normal working hours does not count as working time, and thus does not attract time off in lieu, overtime or other financial reimbursement.

Exam Leave must be taken only for a half-day in which the exam is to be taken.

Study Leave should be granted for a full day prior to the day of an exam. One study day will be allowed per exam day.

No Study Leave is eligible for resit exams.

Where a course has no sit-in exams, time off or study leave is eligible for work on written assignments. This would be 1.5 days of study leave per assessment. (Equivalent to one study and half day exam leave for exam-based courses). Note; this is only for courses with no sit in exams or where, for example, a dissertation is in place of an exam. Study leave for regular assignments will not be granted.

7.0 Reimbursement of Expenses

The normal rate of reimbursement is (a maximum of) 75% of expenses incurred for:

- Course enrolment fees
- Examination fees

With increasing cost of resources, particularly text books, BSO can purchase necessary books on behalf of the staff member. These books will belong to the organisation and must be returned to an identified person to be re-used by future staff members undertaking similar studies.

If books are not returned or returned in poor condition, the staff member will be expected to pay for a replacement(s).

BSO HR is recommending local “text book libraries” to encourage others to pursue development while keeping these costs to a minimum. The previously bought text books will be reused.

Cost of resit examinations will not be reimbursed.

It will not be possible for the BSO to fund the costs of production of a Dissertation for a Master’s degree.

Travel expenses will be paid at public transport rate. Staff members can claim for car-parking fees on submission of receipt.

Expenses/Fees **will not** be paid in retrospect to any member of staff who has not been given prior approval for attendance.

8.0 Membership of Professional Bodies

Membership fees for professional bodies will not be paid by BSO, subject to the exceptions below:

- Where it is a consolidated part of the course fee and it will be for the duration of the course full membership fees will be paid. On completion of the course, professional membership fees should be paid by the member directly.

9.0 Resits

In the event of a member of staff needing to resit an examination, a half-day’s exam leave on the day of the examination will be granted. There will be no reimbursement for the exam fees and no study leave for resits.

10.0 Courses/Programmes considered relevant for Support

In general, the BSO will provide support under “Professional” and “Personal” to courses which meet the consideration highlighted earlier and lead to an award/accreditation. In order to give some guidance on courses likely to meet the criteria the following courses/ programmes will be considered appropriate, although this is not an exhaustive list:

- Institute of Healthcare Management courses;
- Chartered Institute of Personnel and Development courses;
- Institute of Chartered Secretaries and Administration courses;
- Chartered Institute of Management Accountants
- Chartered Institute of Purchasing and Supply course;
- Chartered Institute of Public Finance and Accountancy courses;
- Certificate, Diploma, Degree and Masters programmes provided by the University of Ulster, Open University or Queen’s University of Belfast which are

- H&SC Management orientated;
- BTEC National and Higher National Certificates with subjects directly relevant to H&SC management and supervision;
- Recognised Trade Union developmental activity pursuant to Part 4 of Agenda for Change terms and conditions handbook.
- Nursing, Midwifery and Allied Health Professional qualifications

The BSO recognises the changing situation in respect of educational methods used and courses/programmes offered and will constantly review the relevance and appropriateness of training, education and development available.

11.0 Liability of Staff for Non-Completion of a Course / Non-Attendance at an Event

Staff members will be required to pay back all course, registration, conference fees and resource costs for non-mandatory training, education and development if they:

- fail to complete all or part of the course;
- fail to attend a scheduled conference/event;
- leave the HSC within two years of completing a training or academic course;
- leave the HSC prior to completing the course.

Staff members may be liable for the cost of paid leave taken should they fail to attend a scheduled conference/event and do not attend work.

Managers must:

- Ensure staff are aware of this section of the Policy as appropriate
- Contact Income Shared Service Centre to arrange an invoice or other method for remittance so that any liabilities can be settled.

Staff or former staff must ensure that all liabilities are settled under this section, prior to their leaving.

Liability may not normally apply in the case of:

- Death
- Pregnancy
- Sickness absence
- Bereavement
- Reasons related to disability
- Redundancy
- Retirement
- Unforeseeable circumstances relating to caring or domestic responsibilities
- Significant personal/business reason

11.1 Liability for Reimbursement

If an employee voluntarily resigns from their employment with the Organisation prior to receiving successful exam results for the current academic year, the Organisation must be reimbursed 100% of current year fees paid for by the Organisation from the start date of the course that year.

If an employee voluntarily resigns from their employment with the Organisation **within one year** of receiving financial assistance, the Organisation must be reimbursed 75% of total fees for the last year of the course.

If an employee voluntarily resigns from their employment with the Organisation **within two years** of receiving financial assistance, the Organisation must be reimbursed 50% of total fees for the last year of the course.

In such cases responsibility for recouping this money is with Line Manager. The manager should contact the Income Shared Service Centre to discuss reimbursement options.

For staff transferring to another NHS, Health and Social Care Organisation, or other public or voluntary body, the BSO will not seek reimbursement. This does not include recruitment agencies.

Where a directorate provides a specialist function, unique to the organisation and is not delivered by any other HSC Organisation, the BSO will seek reimbursement for any funded training or development as per above. Examples of this may be Procurement and Logistics and Legal Services.

12.0 Procedure for applying for Training, Education and Development

Before Applying

- Check that the course of study is included Personal Development Plan or will meet a development need.
- Source costs of course and associated costs (e.g. travel)
- Line manager discuss application with the employee. The line manager should forward all requests for external courses of study and research secondments to their Director and accountant to ensure there is budget available.
- All other Mandtory Training must be completed and up to date before applying for further Personal/Professional development.
- Employees must have successfully completed their Probationary Period before applying for further Personal/Professional development.

Application & Booking

- For internal courses' booking contact bs0.learninganddevelopment@hscni.net to secure a place. There is no need to apply/book via HRPTS.
- For HSC Leadership Centre/Clinical Education Centre courses are applied through their websites. Please ensure funding is agreed before applying. There is no need to apply/book via HRPTS. For some courses, BSO HR Learning & Development may have an active waiting list.
- For external courses' please complete the eForm in Section 16 - Assistance to Study Application – BSO Human Resources & Corporate Services Online Forms (hscni.net)
- Courses with a cost associated should get line manager consent before applying to the course/event
- If required by external provider, a letter advising the financial support arrangements will be provided for each year of study by HR
- Any leave (e.g. exam, study) should be requested via HRPTS

Make Arrangements for External Providers

- Raise a requisition where applicable (with e-proc)
- Invoices paid (with FPM)
- Book external course as required by provider
- Book travel/accomodation if required

13.0 Claiming Reimbursement of Expenses

Reimbursement of expenses - please see the " ESS How to Guide" - [How to create an expense claim.](#)

For textbooks, staff must provide confirmation of which subjects are to be studied each year via official clarification from the College/University, to enable BSO to purchase the appropriate textbooks.

14.0 Booking Travel Abroad/Outside of Ireland

Employees should note that booking travel arrangements, e.g. flights, transfers etc., should be done through a procured agent, Selective Travel (<http://www.selective-travel.co.uk/>), whom the organisation uses. This includes flights from Northern Ireland to Britain. Employees are encouraged to use virtual tools where possible to avoid travel costs.

15.0 Assistance to Study Application

This form must be completed when an employee is applying for training/development provided by a non-HSC provider and where there is a cost associated.

This form can also be used to record other training/development attended by staff where there is no cost associated but they would like to have it recorded against their HR Training record.

[Assistance to Study Application – BSO Human Resources & Corporate Services Online Forms \(hscni.net\)](#)

16.0 Monitoring and Reviewing the Policy

It will be the responsibility of the nominated Director to ensure the Policy is implemented. This policy shall be reviewed:

- Every 3 years or;
- Following receipt of new information;
- Upon implementation of new agreements which may affect the Policy

17.0 Equality & Human Rights

The Policy has been screened for equality implications as expected by Section 75 and Schedule 9 of the Northern Ireland Act 1998. Equality Commission guidance declares that the aim of screening is to recognise those policies which are likely to have a

significant influence on equality of opportunity so that greatest resources can be dedicated to these.

Using the Equality Commission's screening standards; no significant equality implications have been recognised. The policy will therefore not be subject to an equality impact assessment.

Similarly, this policy has been considered under the terms of the Human Rights Act 1998, and was deemed compatible with the European Convention Rights contained in the Act.

The BSO is committed to the provision of equality of opportunity in training and development regardless of age, religious belief, political opinion, gender or marital status, sexual orientation, race or ethnic origin, disability, domestic responsibility or Trade Union membership.

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