

NON-MEDICAL FUNDING REQUEST PROCEDURE

1. Introduction

This document outlines the process for funding applications for non-medical CPD including the guidance on how to complete the annual Training Needs Analysis (TNA) and how to apply for funding that is not listed on the annual TNA.

NB. Courses should not be booked until a confirmation of funding is received from the CPD panel and a subsequent learning contract has been returned to cpd@ldh.nhs.uk . If the course is booked and the panel does subsequently not agree funding then the service line/ department will have to identify funds from their own budgets or the individual staff member will need to self-fund the course/conference.

2. CPD Panel

To ensure that the allocation of funding for non-medical CPD is fair and transparent, all funding requests will now be reviewed by the Trusts dedicated CPD panel.

The role of the CPD panel is to review and approve CPD requests from the annual Training Needs Analysis (TNA) and any additional ad hoc funding requests that may occur throughout the financial year. The CPD Panel will provide a consistent approach to approving funding and will ensure that all training requests that are approved are in line with the Trust's and Health Education East of England priorities.

The membership of the CPD panel is as follows*:

- Associate Director of Nursing
- Head of Training and Learning
- CPD Co-ordinator
- Practice Development Nurses/Midwives/AHP
- Heads of Nursing/Midwifery
- AHP Lead
- Pharmacy Education Lead
- Accountant
- Apprenticeship Lead

The CPD panel will meet monthly and will report quarterly to the Workforce Committee and Operational Practice Education Group (OPEG)*. The CPD Co-ordinator is responsible for providing a summary of meeting notes and actions for the group.

**Please note that due to the organisational merger between Bedford Hospital NHS Trust and Luton and Dunstable University Hospital NHS Foundation Trust panel members may change and the committees/ boards that the CPD panel report to may change.*

The CPD panel will report on external CPD funding from Health Education East of England (HEEoE) to HEEoE.

For staff that are not eligible to access funding from the HEEoE allocation; the funding requests will be assessed via a separate panel consisting of the following members:

- Head of Training and Learning
- Apprenticeship Lead
- Training and Learning Manager
- HR Business Partner
- Education Lead for Pharmacy
- OD representative
- Finance Representative

3. Training Needs Analysis

The Training Needs Analysis (TNA) will be circulated to all departmental managers in the third quarter of the financial year.

- **Sheet 1** of the TNA is the **“Information Page”** please complete all details on here so that the Learning and Development Team can track which department has completed and returned the TNA.
- **Sheet 2** of the TNA (**“TNA_InHouse_Reference_List”**) includes all in-house training that is required for staff. Please use this list as a reference and include staff details on the **“TNA_InHouse”** tab. You can find a full list of training and the course details on the Training and Learning Website: www.bhteducationcentre.co.uk
- **Sheet 3** of the TNA (**“TNA_InHouse”**) is where you should list all staff that require any of the training listed in the **“TNA_InHouse_Reference_List”** sheet.
- **Sheet 4** of the TNA (**“TNA_External_Funding_Requests”**) is where departmental managers should complete, in detail, the courses that they would like funding for in the upcoming financial year. Please note that if any of the fields are incomplete then the TNA will be returned for completion.
- **Sheet 5** of the TNA (**“TNA_Apprenticeships”**) is where you should express interest for any apprenticeship qualifications for your staff. A list of the relevant apprenticeship qualifications for existing staff can be found on the **“TNA_InHouse_Reference_List”**

When completing the TNA, please complete a new line for every staff member. The CPD panel will review the TNA line by line. Each TNA request should be completed in detail. If there is inadequate detail or missing information then the course will not be considered for funding.

3.1 Red, Amber, Green (RAG Rating)

Ensure that you rate the training needs using the following RED, AMBER and GREEN (RAG) rating system:

“Business Critical” – RED

“Required to improve service” – AMBER

“Personal Development” – GREEN

Please RAG rate your courses accurately.

4. Agreeing funding

Please note that not all funding requests listed on the TNA will be issued funding. Courses should not be booked until a confirmation of funding is received from the CPD panel and a subsequent learning contract has been returned to cpd@ldh.nhs.uk . If the course is booked and the panel does subsequently not agree funding then the service line/ department will have to identify funds from their own budgets or the individual staff member will need to self-fund the course/conference.

The Trust will adopt a strategy for expenditure of our annual levy liability and apprenticeship requests will be approved if they meet the needs of the strategy and subject to availability of levy funds.

5. Local Universities (East of England)

It is strongly advised to use local universities. These are:

- **University of Bedfordshire**
<https://www.beds.ac.uk/howtoapply/departments/hcp/heacar/>
- **University of Hertfordshire**
<https://www.applycpd.com/herts>
- **University East Anglia (UEA)**
<https://www.uea.ac.uk/medicine-health-sciences/continuing-professional-development/course-directory>
- **Anglia Ruskin University**
<https://aru.ac.uk/study/continuing-professional-development>
- **Buckinghamshire New University**
[Home | Buckinghamshire New University \(bucks.ac.uk\)](https://www.bucks.ac.uk)

The CPD budget can only cover the course fees therefore if you are looking at universities further afield, you should also consider travel time and your departmental budget to cover travel and potential overnight accommodation and subsistence.

It is imperative when completing the TNA that you check that the university selected is running the course required. You must also determine the course cost.

6. Funding Allocation

There are 3 funding streams available to the Trust to fund CPD courses, these are:

1. Funding received from Health Education England
2. Internal training budget
3. Apprenticeship levy liability

The amount that the Trust receives from each of these funding streams varies year on year.

It is also important to note that the funding from Health Education England is not always guaranteed and is awarded to support training for Nurses, Midwives, Nursing Associates and AHPs.

6.1 Health Education England Funding

Health Education England usually allocates funding to organisations in the first quarter of the financial year. This funding can only be used for Registered Healthcare Professionals (Nurses, Midwives, Nursing Associates and AHPs) and does not include funding for Pharmacists or Pharmacy Technicians.

Health Education England issue a list of priority areas to the Trust to outline what type of courses they will fund (clinical courses only). The priorities for training change each year and, where appropriate, all TNA requests will be slotted into a 'priority' category.

Based on the HEE training priorities for the financial year the CPD panel will then work through all the courses listed on the TNA and allocate each course to a HEE defined category to ensure that courses meet the requirements outlined by HEE.

6.2 Internal Training Budget

The internal training budget will be used to fund non-clinical courses. A non-clinical panel will review the requests as outlined in section 2.

6.3 Apprenticeships

The introduction of the apprenticeship levy has increased the number of qualifications available to Bedfordshire Hospitals Staff at all levels. Apprenticeships enable staff to work towards a nationally recognised qualification whilst continuing to work.

Apprenticeships are now available from level 2 to level 7 and apprenticeship standards are continuing to develop. A list of the most common apprenticeships that take place within the organisation have been listed on the In House Reference list on the TNA. For further details on any of these qualifications please visit the Institute for Apprenticeships Website (<https://www.instituteforapprenticeships.org/apprenticeship-standards/>) or contact the Trusts Apprenticeship Lead:

Bedford site: apprenticeships@bedfordhospital.nhs.uk

Luton site: apprenticeshipsteam@ldh.nhs.uk

7. Confirmation of funding via the TNA

Once the CPD panel have decided which courses are essential to the organisation, service or role, the trust then have to action the following:-

- For HEE funded courses the submission will be authorised by an executive director and sent to HEE for approval
- For internally funded courses - a list will be compiled for all agreed courses including departments, cost and delegate.

Once approval has been received from HEE line managers will be informed via email. The same process will be applied for internally funded courses.

7.1 Booking onto a course

When the staff member is ready to book onto the course, they should complete the learning contract and send to the CPD Co-ordinator. The requisition for this course will then be raised and Finance will send the Purchase Order to the supplier. The supplier will then send an invoice for payment to accounts payable and the course will then be paid.

There may be some circumstances where staff may wish to pay for the course themselves and be reimbursed for the course fees. This is not a preferred method of payment and can only be used in exceptional circumstances and after discussion with the CPD Co-ordinator.

Where required the CPD Co-ordinator will provide a sponsorship letter to the provider.

The staff member is responsible for booking themselves a place onto the course.

8. Additional Funding Requests

Where there are additional funding requests (courses requests that were not listed on the TNA) the line manager should complete a funding request form (Appendix 1) and submit to the CPD Panel:

cpd@ldh.nhs.uk

The request will be presented to the CPD panel at the next meeting.

8.1 Courses for New Posts

If a job role that you are advertising requires training or you would like to offer training as a recruitment incentive you must ensure that you have secured funding before advertising the post.

If you would like to apply for funding for training for a new post you should follow the additional funding request procedure as outlined in section 7.

If funding is unsuccessful from the internal training budget you should seek other alternatives to pay for the required course before going out to advert.

You should not advertise or inform candidates that they can have access to training if funding has not been secured.

9. Self-Funded Courses

The Trust supports and encourages staff undertaking CPD. If a member of staff would like to self-fund a qualification it is important that they confirm the practice hour requirements. Some self-funded courses require the delegate to complete aspects of their course in a clinical area and require a sign off process by a senior colleague. This may have an impact on the service and the job role. It is therefore imperative that the line manager agrees to support the self-funded delegate before enrolment as additional arrangements including study leave; placement supervision and practice placements may be required in order for the delegate to complete course requirements.

10. Learning Contract

Bedfordshire Hospitals NHS Foundation Trust is committed to developing staff and ensuring that they have the opportunity to maximise their skills and abilities. However, as the Trust are investing significant resource into developing the skills of the staff it is imperative that the Trust has a return

on its investment. Staff who receive funding for any development must sign a learning contract that outlines their commitment to the training they are undertaking and the Trust.

Please see appendix 1 for a copy of the learning contract.

Please ensure that all learning contracts are returned in good time, applications/learning contracts received within 21 days of course start or application deadline will not be actioned. A future date will be considered, if within the same financial year.

APPENDIX 1

Funding Request Form

The line manager and delegate is required to complete the funding request form. This funding request form will be presented to the CPD panel who will decide if funding will be granted for the course request.

Please refer to the CPD procedure documents for further information regarding your funding request.

Once completed please return to the CPD Co-ordinator via email: CPD@ldh.nhs.uk

Manager Name and Job Title:	
Staff Member Name(s) and Job role(s) nominated for this course:	
Department:	
Course Name:	
Course Provider: (please provide full name and address and if applicable, email address and contact telephone number) <i><u>Failure to provide full name and address may result in request being rejected.</u></i>	
Course dates:	
Cost: (£) <i><u>Please note that if request approved, the Education Department will only cover the cost of the course and not any associated accommodation, travel costs.</u></i>	
How many members of staff within your department are required to hold this qualification?	
How many members of staff currently hold this qualification?	
Is this qualification a requirement of the job role?	

Please explain in detail why funding should be approved?	
Once this course has been completed, how do you expect the learner to implement/ practice their learning?	
Explain in detail how this course will improve the service (examples: Income generation, nurse led services, income generation)	
What will be the impact to the service if funding is not agreed?	
Managers Signature	
Date	

For Training Team use only:

Request approved YES / NO	If approved, date approved:		NSR No/Date raised:	Cost Centre	Date conf. emailed to delegate/ manger	Verified by:
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APPENDIX 2: LEARNING CONTRACT/ TRAINING AGREEMENT

Bedfordshire Hospitals NHS Foundation Trust is committed to developing staff and ensuring that they have the opportunity to maximise their skills and abilities. However, it is not in the business interest of the Trust to invest valuable resources to a significant level that are not subsequently reinvested in the organisation.

PLEASE ENSURE ALL SECTIONS ARE COMPLETED – FORMS WILL BE RETURNED IF INCOMPLETE

Name:

Job Title:

Area/ Department:

PROFESIONAL DEVELOPMENT

Course Title:
Provider:
Course Start Date:
Course completion Date:
Course Cost:
Are you an overseas student? If so what is the overseas student cost of the course?
How does this course/ study event relate to your objectives or professional development?
How will the knowledge/ skill gained be shared within the organisation?

CONTRACT

On completion of the above course, I agree to remain working for Bedfordshire Hospitals NHS Foundation Trust for a period of one year. If, however, I wish to leave before that time, I agree to pay a contribution towards the cost of my training. The percentage I agree to pay is in line with the Staff Development and Study Leave Policy which outlines the following:

- If I leave the Trust /do not complete the course I will make 75% contribution towards the course cost.
- If I leave the Trust 1-6 months after qualifying/ completing the course I will make a 50% contribution towards the course cost.
- If I leave the Trust 7-12 months after qualifying/ completing the course I will make a 40% contribution towards the course cost.

Managers Signature:

Print name:

Date:

Delegate Signature:

Print Name:

Date: