

# Training and Development Policy

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# Training and Development Policy

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# Training and Development Policy

## INTRODUCTION

BrisDoc aims to provide the highest quality care to all patients using its services. In order to minimise risk to both patients and staff, all staff are required to attend and complete various training to deliver a safe, effective service in their area of work.

The purpose of this policy is to provide guidance to managers and staff on the arrangements for training within BrisDoc.

It is also important to read this document in conjunction with BrisDoc's Induction Policy which outlines how we will ensure that all new staff are trained upon commencement of employment.

## SCOPE

This policy sets out a framework for ensuring that staff receive corporate training according to a mandatory training matrix (available to all staff on radar). It applies to two different groups of people, collectively referred to as 'staff':

### EMPLOYEES

This specifically relates to team members who are 'employed' on a salaried basis (whether fixed term or permanently) and have a regular hours contract with BrisDoc. They are 'employees' as legally defined by the Employment Rights Act 1996 and have specific employment rights.

### CASUAL WORKERS (ALSO KNOWN AS BANK STAFF)

This specifically relates to team members who have an 'engagement' with BrisDoc rather than 'employment'. This staff group have no obligation to provide or perform work and therefore have no employment rights.

## KEY PRINCIPLES

BrisDoc is committed to ensuring that all staff have equal access to training to perform their role to the required standard. No employee will be denied access to any training by reason of discrimination connected to a Protected Characteristic.

All training requests will be properly considered and treated in a fair and consistent way in accordance to the criteria specified in Section 6.

- All staff receive an annual Personal Development Review which provides the opportunity to discuss training and development with their line manager.
- BrisDoc will promote a climate, and provide space and resources, to ensure that continuing learning and individual development is recognised as imperative to meet the future plans of BrisDoc.
- BrisDoc will ensure that funding for (optional) training is transparent and equitable.

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## RESPONSIBILITIES

### PEOPLE TEAM'S RESPONSIBILITIES

- Provide the necessary information to both staff and line managers on how to access the relevant training courses.
- Produce and release an annual training schedule/plan to show what training is available.
- Produce and release a training matrix to show what training is required from the employee depending on their role.
- Ensure all new starters receive a training and development letter and a current training matrix in their welcome pack with login details and guidance on how to access training.
- Coordinate the delivery of training and development activities that are organised centrally by BrisDoc. *(Should some departments / services require additional role-specific training, the coordination of this may be passed to the Service Manager).*
- Provide the Corporate Leadership Board, Strategic Workforce Board, and individual line managers with regular progress reports on completed Statutory and Mandatory Training.
- Manage training requests for training outside of the Statutory and Mandatory courses and ensure consistency when allocating funding.
- Train and support staff with line management responsibilities about their role and responsibility of training and development for their team members in line with this policy.

### LINE MANAGERS' RESPONSIBILITIES

- Take an active part in helping staff identify their development needs, facilitating access to staff development opportunities and assessing the effectiveness and performance gained from staff development;
- Ensure that training and development needs are discussed in the Performance & Development Review (PDR). If any courses or additional training outside of the normal statutory / mandatory courses are agreed, the line manager must ensure that the staff member completes a Training Request Form (Appendix 1).
- Ensure that their team members complete the statutory and mandatory training courses within the allocated timeframes taking appropriate disciplinary action with staff who fail to complete their training within the required timeframe despite reminders, support and encouragement.
- Update the People Team if a member of their team attends / completes a training course outside of the normal statutory / mandatory courses.
- Ensure all training undertaken is recorded in RotaMaster from which training performance will be monitored and reported on for Service Managers and the Corporate Dashboard.
- Provide on-the-job coaching/training to team members as required.
- Determine any role-specific training not already included in BrisDoc's Training Matrix.

### STAFF MEMBERS RESPONSIBILITIES

- Ensure completion of all statutory and mandatory training within the allocated time frames. Failure to do so could put themselves, patients and other staff members at risk and, in extreme circumstances for persistent failure, invoke the disciplinary process.

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- Take responsibility for identifying areas where their work might be developed, making themselves aware of and taking advantage of suitable opportunities and applying their learning in their work.
- Ensure that specific training needs and suggestions for development are discussed in the PDR.
- Ensure attendance at pre-booked sessional training courses.
- Ensure all statutory and mandatory training is completed before requesting additional training course. Failure to do so may delay or prevent additional training courses being authorised.
- Complete a Training Request Form (Appendix 1) in advance of any training courses outside of the statutory and mandatory courses not specified in the Training Matrix, and adhere to the Terms of Agreement.

# Training and Development Policy

## TYPES OF TRAINING

There are 4 types of training:

- 1) Statutory courses
- 2) Mandatory courses
- 3) Optional courses
- 4) Additional courses

BrisDoc's training courses are predominantly delivered in three main ways:

- 1) Computer-based training (CBT) – using internet access from any computer,
- 2) Sessional training – with an experienced trainer present and:
- 3) On the job training/coaching.

### STATUTORY TRAINING

Statutory training are courses that all staff have to complete, regardless of their role, in order for BrisDoc to comply with the law and requirements of regulatory bodies. These include:

- Fire Safety Awareness
- Health and Safety Awareness
- Information Governance

### MANDATORY TRAINING

Mandatory training is any compulsory training that BrisDoc requires its staff to undertake:

- To carry out duties safely and efficiently,
- To reduce/address areas of risk &
- To maintain competence to the required standards identified by external bodies.

BrisDoc's training matrix is reviewed on an annual basis by the Strategic Workforce Board and is available to staff on radar.

### OPTIONAL / ADDITIONAL TRAINING

Optional training courses are those that sit outside of the normal statutory and mandatory courses and normally apply to employees, not casual workers. Some optional courses may be considered as “**core**” to the role while others may be considered as “**desirable**”.

<b>Core Training</b>	<p>Core training is where the skills / knowledge / capabilities achieved on the course are <b>necessary</b> in order to fulfil the requirements of the role.</p> <ul style="list-style-type: none"><li>• For Core Training, study leave and funding may be granted if the course is required to fulfil a particular role, and or enhance the employee's performance in their role</li></ul>
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	<ul style="list-style-type: none"> <li>The funding of all “core” courses may be based on the individual’s contracted hours i.e. a part-time employee may have their funding pro-rata’d against 37.5 hours.</li> </ul>
<b>Desirable Training</b>	<p>Desirable training is where the skills / knowledge / capabilities achieved on the course <b>support the individual’s career development</b> (as part of their Continuous Professional Development) rather than being an immediate benefit to the workplace or necessary for their current responsibilities.</p> <ul style="list-style-type: none"> <li>If a course is “desirable”, the employee may not be granted study leave and they may not have the full course fees funded by BrisDoc.</li> <li>The funding of all “desirable” courses will be based on the individual’s contracted hours i.e. a part-time employee may have their funding pro-rata’d against 37.5 hours.</li> </ul>

### TRAINING REQUEST PROCEDURE FOR OPTIONAL COURSES

#### CRITERIA FOR APPROVAL

All training requests (ideally made as a result of a PDR meeting) must consider the following criteria before being approved:

- Relevant and Beneficial** in order to ensure that the proposed training would enhance the employees’ performance in their role at BrisDoc (Patient and Quality Care). The line manager will discuss the relevance of a proposed course to the employee’s current job.
- Cost:** It is important to ensure that the cost is within the training budget and appropriate to the need of the company (Resource Care).
- Current Training Record:** All employees should hold an up to date statutory and mandatory training record in order to be considered for optional training. This can be confirmed by People Team.
- Duration:** Consideration must be given to the length of the course to ensure that adequate resourcing levels are available and in place so that patient and staff care are not compromised.

When there are training requests with high demand, managers **may** use the following criteria in guiding their decision to approve:

- Affordability of training
- Compliant with statutory and mandatory training requirements
- Time since previous training
- Impact on current workload and responsibilities
- Time employed by BrisDoc
- How well the training fits within BrisDoc’s strategic needs

These factors can particularly be taken into account when deciding which co-owners are approved when a certain training is oversubscribed.

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## TRAINING AGREEMENT

Whilst BrisDoc is committed to supporting learning and development of staff, there are a number of conditions which apply when optional training courses are approved. All staff completing Training Request Forms must therefore consent to the below conditions / Terms of Agreement:

- Should staff not attend the training course or voluntarily withdraw from or terminate the course early without BrisDoc's prior written consent, we reserve the right to claim up to 100% of the investment costs.
- Should staff resign from BrisDoc either prior to completion of the training course or within 2 years after the end of the course, we reserve the right to reclaim up to 75% investment costs. In the latter case, the amount which would otherwise be due to BrisDoc shall be reduced by 1/24<sup>th</sup> for each complete calendar month after the end of the course during which the staff member remains employed by BrisDoc.
- Should staff reduce their contracted hours during or within two years of completing the training course, BrisDoc reserves the right to reclaim a percentage of the costs incurred (up to a maximum of 75%) – this will be calculated based on the pro-rata'd figure of the full-time equivalent costs with a reduction of 1/24<sup>th</sup> for each complete calendar month after the end of the Course.

For example, if a staff member was full-time (37.5 hours) when they commenced the training and reduced their hours to 30 hours per week, BrisDoc will recover up to 20% of the cost adjusted by 1/24<sup>th</sup> for each calendar month worked since completion of the Course. If there was a reduction to 10 contracted hours per week, BrisDoc would recover up to 73% of the cost adjusted by 1/24<sup>th</sup> for each calendar month worked since completion of the Course.

- BrisDoc will not fund accommodation or travel costs for training courses considered as "desirable" for the role unless otherwise stated or agreed with your line manager
- BrisDoc will not incur the costs for the need to repeat exams or courses / modules.

## TRAINING COURSE REVIEW

- Once the employee has completed the authorised optional training, they will be given a 'Training Review Form' (See Appendix 2). This is to assess whether the outcome of the training met the individual's and line manager's expectations, and to ascertain if it would be beneficial to further invest in that area of training for other members of staff.

## TRAINING RECORDS

- A record of completed training is included in the individual's record in RotaMaster by the People Team. RotaMaster is pre-populated with each of the training requirements for each individual and will report on expired training.
- Copies of training course certificates will be held in the individual's personnel folder and a copy sent the individual.



# Training and Development Policy

## RELATED POLICIES AND PROCEDURES

- Equality and Diversity Policy
- Performance & Development Review (PDR) Policy
- Induction Policy and Procedure
- Disciplinary Policy

# Training and Development Policy

## APPENDIX 1: TRAINING REQUEST FORM

Please complete this form if you are looking to attend a training course outside the current statutory and mandatory training courses listed in the Training Matrix, & you wish BrisDoc to help subsidise the cost of this course.

*NB: This form is just a request for training - whilst BrisDoc is committed to supporting employees learning and development, the company also needs to evaluate the practicalities of employees taking time off work to attend training courses and the costs involved.*

<b>Name:</b>
<b>Job title:</b>
<b>Line manager:</b>

### Training session/Course Information:

Name of training session/course you wish to attend:
Name of the training provider:



## Training and Development Policy

Have you completed all statutory and mandatory training as listed in the training matrix?	
What is the cost of the course?	
Are there any additional costs that you wish BrisDoc to cover? (please state costs and what the costs are for)	
<p style="text-align: center;"><b>Training Terms of Agreement:</b> <b>Declaration (to be completed by employee)</b></p> <p>I hereby agree and declare that:</p> <p>(1) In consideration of BrisDoc agreeing to meet the costs as authorised, I undertake to reimburse BrisDoc:</p> <ul style="list-style-type: none"><li>• 100% of the investment costs if I do not attend the training course or voluntarily withdraw from or terminate the course early without BrisDoc's prior written consent.</li><li>• Up to 75% of the investment costs if I am dismissed or otherwise compulsorily discharged from the Course, unless the dismissal or discharge arises out of the discontinuance generally of the Course.</li><li>• Up to 75% of the investment costs should I resign from BrisDoc either prior to completion of the Course or within 2 years after the end of the Course, except that, in the latter case, the amount which would otherwise be due to BrisDoc shall be reduced by 1/24<sup>th</sup> for each complete calendar month after the end of the Course during which I remain employed by BrisDoc.</li></ul> <p>(2) Up to 75% of the investment costs should I reduce my hours prior to completion of the Course or within 2 years after the end of the Course. This will be calculated based on the costs paid with a reduction of 1/24<sup>th</sup> for each complete calendar month after the end of the Course which you remain on your original contracted hours.</p> <p>(3) To the extent permitted by law, I agree that BrisDoc may deduct a sum equal to the whole or part of the Costs due under the terms of this Agreement from my wages (as defined by section 27 of the Employment Rights Act 1996) or from any other allowances, expenses or other payments due to me.</p> <p>(4) I understand that BrisDoc will not fund accommodation or travel costs for this course nor will they incur the costs for any repeats of courses/modules or exams.</p> <p>NB: The amount due to BrisDoc under the terms of this Agreement is a genuine attempt by the Company to assess its loss as a result of the termination of the Employee's employment and takes into account the derived benefit to BrisDoc. Thus Agreement is not intended to act as a penalty on the Employee upon termination of their employment.</p>	

## Training and Development Policy

I confirm I have read and agree to all of the above:

Signed \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_

*(Employee)*

## Training and Development Policy

To be completed by line manager:

Authorised: Yes / No.

If No, reasons why: \_\_\_\_\_  
\_\_\_\_\_

BrisDoc to pay: £ \_\_\_\_\_

Study Leave/attending the training days agreed for \_\_\_\_\_ days per week / month

Signed \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_

***Please pass to the People Team***

To be completed by Training Coordinator:

Statutory and Mandatory Training completed: Yes/ No

**If No, employee must complete statutory and mandatory training before the additional training course commences.**

To be completed by Nigel Gazzard, Managing Director if the commitment is above £3,000:

I agree that BrisDoc will pay/reimburse this employee for £ \_\_\_\_\_ in order for them to attend the above course.

Signed \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_

***Please pass to the People Team who will confirm the outcome to the line manager and pass a signed copy of the form to the employee***

# Training and Development Policy

## APPENDIX 2: TRAINING REVIEW FORM

We hope you enjoyed your recent training course. Please spend 5 minutes completing this form as we would like to get your view on how useful the course was for you and your role at BrisDoc and whether it would be beneficial to your colleagues.

<b>Name:</b>
<b>Job title:</b>
<b>Line manager:</b>

### Training session/Course information:

Name of training session/course you attended:	
Name of the training provider:	
Please give a brief summary of the training session/course content:	
Training sessions/course completion date:	
What was the cost of the course?	
Did you think this course was good value for money? (If not, please state reasons)	

## Training and Development Policy

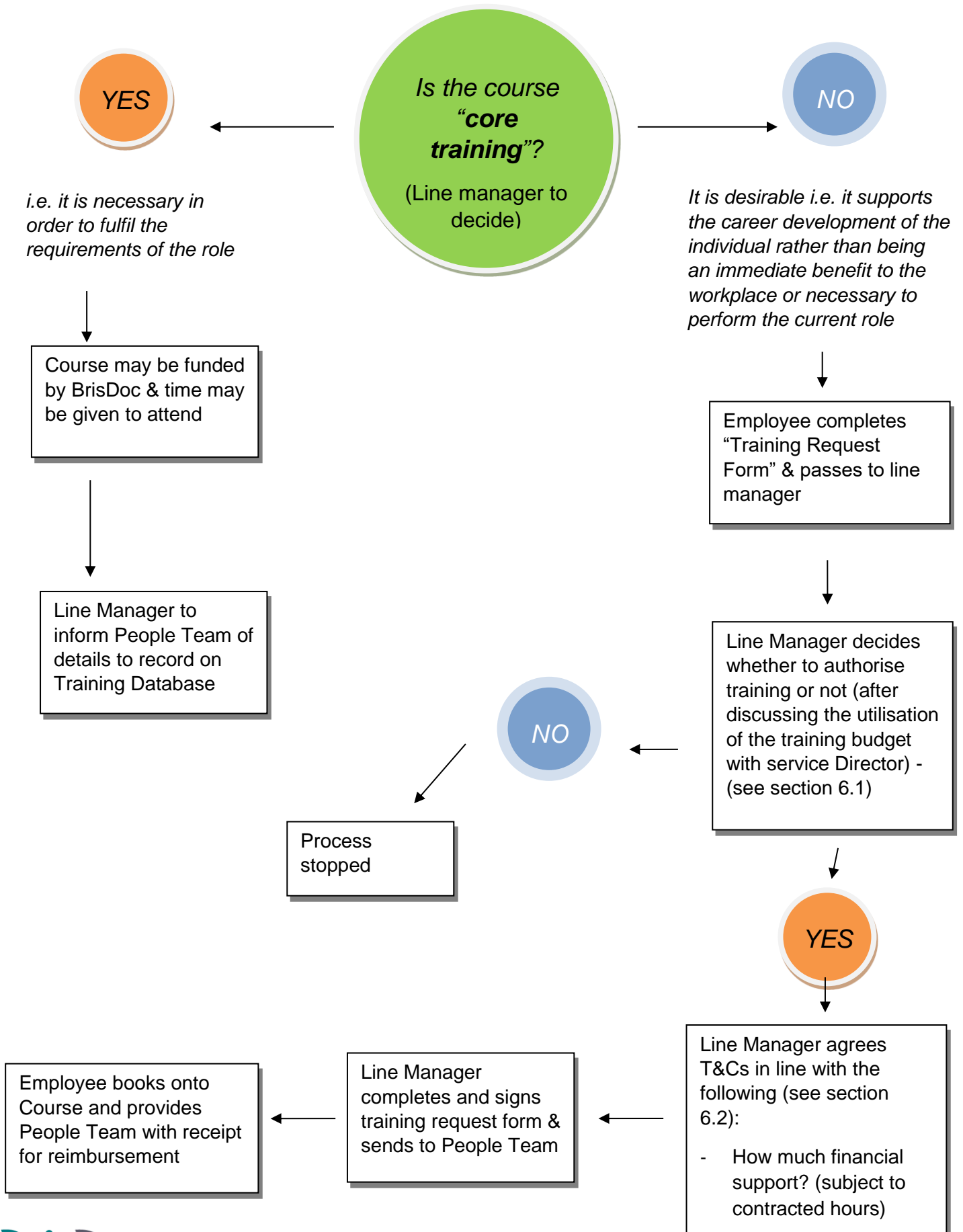
What knowledge/skills did you hope to gain from this training session/course?					
Did you learn the skills that you expected to learn? (If not, please state reasons)					
Did you learn any additional skills that you think you will be able to use at work?					
What was your opinion of the training provider? (please rate from 1 to 5, where 1 = very poor & 5 = excellent)					
<b>Area</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
Location					
Professionalism					
Presentation					
Trainer					
Training notes/resources					
Relevance to current post					
Would you recommend this course to other members of staff? (If yes, why? If not, please state reasons)					

**Thank you for completing this review form**  
**Please return to the People Team**



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## APPENDIX 3: PROCESSING A REQUEST FOR TRAINING



# Training and Development Policy

## CHANGE REGISTER

Date	Version	Author	Change Details
20.1.17	3	C Kerrigan, CL Nicholls	Remove previous change register. Remove training matrix and refer to it on radar throughout. Inclusion of use of disciplinary process. Inclusion of training records in RotaMaster, removal of references to training passport and training database.
09.08.18	4	N Clegg	Updated limit on training request for Director's approval to £1,000 (from £500)
21.08.20	5	E Daniels	Removed DVD's in point 5 Types of training. Updated the formatting of the document to reflect new policy template. Point 5.2 changed from "regularly" reviewed to "annually" reviewed. Added paragraph in 5.3 core training "The funding of all "core" courses may be based on the individual's contracted hours i.e. a part-time employee may have their funding pro-rata'd against 37.5 hours"
14.06.22	6	M Duncan	Change references: HR department to People Team and Workforce Governance Board to Strategic Workforce Board. Manager approval limit increased to £3,000
20.02.23	6.1	N Dowding	Additional guidance for managers to approve training.
22.04.24	6.2	H. Hinton	Changing requirement to complete Stat/man training prior to funding training from 'must' to 'should'.