



Workforce Learning & Development Policy

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“Learning together, to be the best we can be”

1. Purpose

- 1.1. Nexus Multi Academy Trust seeks to encourage and provide financial assistance to any employee who wishes to pursue an educational and/or professional course of study provided by an internal or external supplier, within the criteria set out in this policy.

2. Scope

- 2.1. This policy applies to all staff employed by Nexus Multi Academy Trust. It sets out the method by which funding can be provided to support learning and development (including Continuing Professional Development) and includes the following areas of study:

- Management Qualifications;
- Study for primary qualifications relevant for professional membership or leading to state registration;
- Study for qualifications related to professional development;
- Conferences, Seminars and Short Courses provided by the Trust (with an associated cost) or by a body or organisation external to the Trust where there is an associated cost.

3. Approval

- 3.1. All applications for approval and payment of fees must satisfy the following criteria:

3.1.1. That the course of study enhances and/or promotes skills and/or provides additional knowledge to enable the employee to perform their current or future role within Nexus. Line managers need to ensure that all appropriate project work is Nexus MAT related; and

3.1.2. That the attendance of the employee at the course of study does not adversely jeopardise service provision.

4. Procedure

- 4.1. All applications will be considered in a fair and equitable manner by the school Headteacher (or the responsible executive manager if employed centrally by the Trust or if funding is requested from pooled budgets held by the central Trust). Applicants should be aware that there is no automatic right for any employee to undertake study for personal development, though Nexus MAT will aspire to support staff to develop as often as is possible.
- 4.2. To facilitate enrolment with a university or external body, applicants may complete course enrolment forms on the understanding that this does not commit Nexus MAT to funding the programme of study. An applicant cannot confirm a placement until funding approval has been granted. Any commitments entered into by the applicant without approval by the Headteacher/executive manager will render the applicant personally liable for full payment of any fees or expenses due and could result in disciplinary action.

5. Application Procedure

- 5.1. The first stage of the application procedure commences with discussion between the employee (applicant) and their line manager in relation to the learning, education or development need, typically as part of the individual's annual appraisal (however, needs may be identified outside of appraisal as part of the school/MAT improvement plan and/or the emergent need of children).
- 5.2. To request funding for a course of study the applicant must fully complete and submit a "Funding for learning application form" (Appendix A).

6. Approval Criteria

- 6.1. Approval will be based on the following:
 - 6.1.1. Applicants must demonstrate they fulfil the entry requirements for the requested programme of study;
 - 6.1.2. The qualification, short course or conference is appropriate to the business aims of Nexus MAT and/or the host school;
 - 6.1.3. That there will be a good expectation of success;
 - 6.1.4. The applicant will be in a position to use the qualification, short course or conference for personal development within their current or future Nexus MAT work environment

6.1.5. Funds are available within the learning and development budget and spending limits have not been exceeded.

6.2. At their discretion the Headteacher/responsible budget holder may request an applicant to attend for interview in support of their application. Details of the interview process and the rationale for taking this approach will be explained to the applicant(s) prior to attendance.

6.3. On completion of the programme of study, the applicant agrees to provide information if requested to the Headteacher/responsible budget holder in the form of a written evaluation. An "End of Study Evaluation" information will enable the Trust to review and evaluate its support and funding of educational study and will enable the sharing of knowledge and facilitate knowledge management and dissemination across the MAT. The Headteacher/ responsible budget holder will determine the format of the report as and when requested.

6.4. Applications will only be approved for funding for an individual year of study (i.e. one academic year) only. Subsequent years of study will require a submission of application for funding, though where the Trust has committed funding to a course of study which runs beyond one calendar year, every effort will be made to ensure there is recurrent funding provided (though this cannot be guaranteed).

7. Payment of fees, expenses, leave and equipment

7.1. Where a qualification is deemed relevant to Nexus MAT business requirements, 100% funding will be provided for all relevant fees as indicated:

- course registration fees;
- module fees;
- tutor fees;
- distance learning package fees;
- e-learning and online resources;
- examination fees;
- course fees to professional bodies, except membership fees;
- other associated fees and costs (not including travel).

- 7.2. Where senior leadership considers that a qualification has a high level of personal development, the Trust may approve funding up to 50% of the approved costs. This is dependent on financial resources being available following the allocation of funds to priority development needs i.e. those linked to the achievement of school/department/individual objectives, career grade progression, competency requirements and those linked to workforce plans.
- 7.3. Qualifications classified under the heading of “personal development” are those which are work related and will be of benefit to the school and/or the Trust **but where the primary benefits** are to the individual. For example, an NVQ which is not a requirement for effective performance in that specific role i.e. it is not an essential criteria in the person specification or it is at a level higher than is specified.
- 7.4. “Payment of fees” covers the educational programme attendance and any examination fee(s), as set out and detailed in the relevant university/college prospectus. If repeat attendance or examination re-sits become necessary, examination fees and other required/associated costs are the applicant’s full responsibility.
- 7.5. Fees that are excluded from the educational funding support include:
- Student union membership fees;
 - Fees and costs associated with graduation ceremonies or award presentations;
 - Travel and accommodation.
- 7.6. Applicants should be aware that travel costs related to public transport to and from courses or conferences may be covered by the school/Trust, at the discretion of the Headteacher/ responsible budget holder.
- 7.7. Any travel costs related to car mileage – and any such accommodation costs - should be granted from departmental budgets and claimed using the schools established procedures. Senior leaders should ensure that these expenses have been identified and factored into departmental budget to support the agreed learning, education or development programme.
- 7.8. Nexus MAT will not usually support the purchasing of course related text books.

8. Reimbursement of fees to Nexus MAT

8.1. In line with contractual terms and conditions of employment, Nexus MAT may reclaim any monies invested in a person's learning and development should they leave the Trust within a two year period following completion of the programme of study (redundancy or other defined criteria excepted), or if they withdraw/fail to complete the approved course of study.

The amount reclaimed will be:

- 100% if the employee withdraws from the programme;
- 100% if the employee leaves Nexus MAT during the programme, or within 6 months of completing (completion of the programme will be taken as the date of the final result).

8.2. Fees will be recovered on a sliding scale over a two year period; the amount reclaimed will reduce as follows:

Timescale	% of costs recoverable
Within 6 months of completion	100%
Within 7 -12 months of completion	75%
Within 13 -18 months of completion	50%
Within 19 -24 months of completion	25%

8.3. Nexus MAT will deduct the outstanding amount from the final salary payment(s) of an individual. It is the responsibility of the individual to ensure they plan for these deductions from their salary payment(s), and to take any mitigating steps to reduce the impact of this. In the event that final salary does not cover the outstanding balance, an agreement will be drawn up to recover the remaining costs over a short, set period.

8.4. Repayment of fees does not apply in the circumstances where an individual moves from one school/setting in Nexus MAT to another.

9. Study Leave

9.1. Study leave will be agreed on a case by case basis in line with the requirements of the course. Nexus MAT will not commit to additional study

time outside the taught hours of programme, and any and all instances must be agreed by the Headteacher/line manager.

10. Equipment

- 10.1. Nexus MAT cannot commit to support all staff with equipment in line with education support, though this will be judged on a case-by-case basis and determined by the strength of each case.
- 10.2. Requests for additional equipment should be submitted on the "Funding for learning application form" (Appendix A). All equipment will be sourced by the school. Nexus MAT does not support the reimbursement of personally owned equipment co-opted for business use.

11. Procedure following deliberation of funding

- 11.1. All applicants will be notified in writing as soon as possible following the decision.
- 11.2. A letter of confirmation will be issued to approved applicants. This letter will confirm any variation to the normal 100% level of support.
- 11.3. Applicants must provide the Headteacher with registration letters or forms that may be required for fees authorisation.
- 11.4. Nexus MAT will normally pay the full cost of the fees direct to the educational institution/provider. Where agreed fees are less than 100% the Trust/school will pay the agreed % direct to the HEI or course provider, with the individual or team paying the outstanding amount.

12. Reporting Outcomes & Withdrawals

- 12.1. Applicants who are approved for support under the terms of this policy must inform the Headteacher/responsible budget authoriser of the outcome of any staged examination and final qualification. Information about

successful results will be added to the employee training records and may be published in Nexus MAT newsletters and reports.

- 12.2. In the unfortunate event of not achieving a successful outcome (for whatever reason), applicants should advise the Headteacher/responsible budget authoriser, who will discuss the situation in confidence with the applicant and offer appropriate support and guidance.
- 12.3. Where an HEI or other provider reports disengagement/failure to complete work/poor attendance, the Trust reserves the right to withdraw staff from programmes of study and pursue reclamation of fees with the individual.

Funding for learning application form

**APPLICANT TO PRINT, COMPLETE AND RETURN TO THE
HEADTEACHER//RESPONSIBLE BUDGET AUTHORISER**

Name	
Job Title	
Start Date with Nexus MAT	
Contract end date (if applicable)	
Employing school or MAT department	
Course/ Qualification title	
Qualification Type (if known)	
University/College/Course Provider	
Describe the time commitment and the period of time it will take e.g. Single day course; four 3-hour sessions over 1 term; 1 day per week for 1 academic year	
Describe the purpose, including the contribution to organisational objectives and any benefits to the employee	
Cost/Fee - per year if applicable	
Any additional resources required and associated cost(s)	
Are you due to be on any long term leave of absence i.e. maternity leave, career break? Yes/No (if yes, please give further details).	

DECLARATION BY THE APPLICANT

Under the terms of the Nexus MAT Learning & Development Policy, I understand and agree that funding may be approved at a lower level and require a contribution from me. If this is the case, and on the understanding that I have been advised of the funding decision, I authorise Nexus MAT to deduct % fees for which I may be liable from my salary.

I understand and agree that under the terms of section 8 of this policy for employee education I may be required to replay all or part of the fees paid on my behalf.

Applicant signature:	
Date:	