

## STANDARD OPERATING PROCEDURE TRAINING AND DEVELOPMENT REQUESTS PROCESS (MENTAL HEALTH DIVISION)

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**VALIDITY – All local SOPS should be accessed via the Trust intranet**

### CHANGE RECORD

Version	Date	Change details
1.0	Jan 2022	New SOP. Approved at MH Division ODG (25 January 2022).

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## 1. INTRODUCTION

This is the Mental Health Division Standard Operating Procedure for the applications for training and development. From April 2020, the budget for training and development was devolved from the Training and Development department to the Divisions. The Division's aim is to provide a system based on fairness and equality for all staff to access training and development to support them in their roles.

<https://join.humber.nhs.uk/humbelievable/>

## 2. SCOPE

The process is used for any training in addition to the statutory and mandatory training provided by the Trust.

### 2.1 Division Training and Development Funding

The training and development application process where funded from the Division training and development budget is aimed at all staff in the Mental Health Division.

### 2.2 Continuing Professional Development (CPD) Funding 2020-2023 via Health Education England (HEE)

Each qualified Nurse/Nurse Associate and AHP have an individual learning budget of £1000 over 3 years which equates to £333.33 per year (this funding does not apply to Psychology, Social work or the unqualified clinical workforce).

There are some post registration education modules provided by local universities and funded by HEE. This funding is subject to yearly changes, so it is important to ask the HEI who provide the course if it is funded before completing an application to the MH training board.

Non-Medical prescribing course is also funded via HEE but applications have to be signed off by the training board and the Non-medical prescribing lead.

## 3. DUTIES AND RESPONSIBILITIES

The General Managers and Clinical lead will ensure the dissemination of the process to teams and individuals through the senior management structure.

All staff requesting training and development must ensure they have completed all statutory and mandatory training.

## 4. PROCEDURES

### 4.1. Application Process

Staff member completes the attached training and development request form (see Appendix 1) providing detailed information requested.

This form must be discussed with the line manager and agreement sort for the staff member to apply.

Included within the form should be details of how this will support the individual in their career and role, how it aligns with the staff member's appraisal and include any benefit to clinical care and service delivery.

On the line manager's receipt of the form, it should be forwarded to the inbox [hnf-tr.mentalhealthdivisiontrainingrequests@nhs.net](mailto:hnf-tr.mentalhealthdivisiontrainingrequests@nhs.net)

It will then be discussed at the subsequent Training and Development Panel.

Forms must be sent by the Friday before the panel meets on the following Tuesday. Panel dates are available by emailing the above inbox.

#### 4.2. Training Panel

Members of the panel are represented by the General Managers for Planned and Unplanned Care, Clinical lead, Consultant Psychologist.

The panel meet monthly to review training and development applications to assess whether:

- The course can be fully funded by the Trust;
- Participation can be partially funded with a sum coming from the central CPD funds and the difference being made by the Division.

or

- The request is declined, this will happen only in the following circumstances:
  - There is insufficient budget remaining in the CPD, Divisional training budget or CMHT Transformation funding;
  - The programme does not align to development within the role; or,
  - There is already an alternative provision in the Trust.

Further details may be requested but the objective of the panel is to approve or decline as appropriate.

For any training approved, the panel will decide appropriate resource of funding i.e. CDP funding, Divisions training budget or a combination of both, or CMHT transformation funding, and this will be entered onto the Mental Health Division training spreadsheet tracker. The member of staff will book the training through their team/admin against the team budget, and finance will transfer the funding into the Cost Code of the team from which the employee is charged to, from whichever funding stream it is coming from i.e. CPD, central training or CMHT transformation.

The applicant and line manager will then be notified within 2 days of the panel reviewing the application.

All training approval will be documented within the Division's training and development record.

***It is the responsibility of the staff member or Team Admin to book their place on the training/event.***

#### 4.3. Guidance when placing the order for the training/development event:

##### 4.3.1 Where funding approved from the Divisional Training Budget or CMHT Transformation (indicated on the form):

Once approved by the panel and the form returned, the staff member or Team Admin must place the order on the SBS system. This needs to be processed in a timely manner to allow time for any set up needed:

A non-catalogue requisition needs to be activated on Oracle so that the purchase order can be issued to the supplier.

If this is a new supplier to Humber Teaching NHS Foundation Trust contact Supplies/Procurement via [HNF-TR.supplies@nhs.net](mailto:HNF-TR.supplies@nhs.net) for a new supplier form. The supplier must be asked to complete all fields of the supplier form. Once completed the form needs to be returned to the supplies department to then register with finance for set-up. *Please note this process can take over 10 working days to complete from the receipt of a completed supplier form. It is imperative that supplier forms are returned as soon as possible so the actual activation on Oracle can be actioned.*

Any requisitions raised on Oracle for this purpose must be coded to the Team budget code unless directed otherwise by the relevant management accountant for that area.

Once the requisition has been activated on Oracle it needs to be approved by the team/line manager (Finance will organise a recharge to the team budget code).

Once approved, Supplies will process the requisition subject to all information being available. If there are any gaps in the information required, the requisition will be returned to the requisitioner with guidance about what information is missing so that it can be redone and resubmitted.

Please note a supplier should only raise an invoice once they have been supplied with a valid Humber Teaching NHS Foundation Trust purchase order. Failure to follow the correct process will cause invoice rejection and payment delay which may lead to staff being unable to attend training courses. All training requests should be planned well in advance to make sure all processes are adhered to.

In the event that a supplier requires credit card payment up front this can be facilitated via the Trust credit card held by the Supplies /Procurement department. The requisitioner/requestor should make clear which payment option is required to secure the place when raising the requisition.

Following the Trust process for ordering is essential to minimise frustration to secure places.

The supplier must ensure to submit their invoice to the RV9 Payable address stated on the Humber Teaching NHS Foundation Trust purchase order. This can be done in three ways:

- by post to the invoicing address:- Humber Teaching NHS Foundation Trust, Phoenix House, Topcliffe Lane, Wakefield, WF3 1WE
- by email to [sbs.apinvoicing@nhs.net](mailto:sbs.apinvoicing@nhs.net)
- electronically by Tradeshift.

Tradeshift is the preferred option by the Trust. It is free to use and is also the quickest route to submitting an invoice for payment, giving access to invoices in as little as 15 minutes, more details can be found <http://tradeshift.com/supplier/nhs-sbs/>.

Upon receipt of a valid invoice SBS will check for the correct billing address and PO number. If this information is not visible the invoice will be rejected. Assuming all information is available the invoice will be added to the system and will be reconciled. Payment will be released once the purchase order has been receipted on Oracle. Failure to receipt a purchase order will cause a notification via email to prompt the requisitioner to log in and receipt. If a payment for a course has been made via credit card it does not need to be receipted.

#### **4.3.2 Where funding from the CPD award (indicated on the form):**

When funding is approved from the CPD award, the Training Panel Administrator will forward the approval to Mel Barnard, Professional Education Lead for her to record onto the HEE

quarterly return. It is the responsibility of the staff member or Team Admin to book their place on the training/event with Supplies against the Team budget.

Funding from CPD allowance is £333.33 per year over 3 years 2020-21, 2021-22, 2022-23. The Division may agree to top up any training events if the event is in excess of this figure.

## **5. REFERENCES**

None to date

V6 27.01.2021

## TRAINING AND DEVELOPMENT APPLICATION FORM & TRAINING CONTRACT

### SECTION A

**PERSONAL DETAILS** (please PRINT your name, job title and work address)

Surname:  Forename:

Job title and core profession:  Assignment N<sup>o</sup>   
*(from your payslip):*

Work base address:

Postcode:

Tel No :  Mobile No and email address:

If you are applying for a substantial course which could be meet any one or all of the following criteria:

- Course duration of longer than 6 months
- Cost of £500 or more
- The training will have a significant impact on service delivery or structure
- You, your manager or the training panel thinks that it will be of benefit

**THEN ALSO COMPLETE SECTION B**

Course Title and Provider	Hours per week	Duration course

Appraisal (has this been discussed and approved within your appraisal or with your line manager and professional supervisor/ lead?)

Cost of Training (show breakdown of costs for example course costs, supervision costs etc)

<p><b>Will there be any travel/subsistence cost? Is it online? (If traveling whether you'll be travelling in worktime)?</b></p>
<p><b>If the course is online will this be accessed within usual work hours or in your own time?</b></p>
<p><b>How will absence be managed in service?</b></p>
<p><b>Please tell us why you are making an application for training below</b></p>
<p><b>What will be the outcome for you and your service on the completion of this training event?</b></p>
<p><b>Section for line manager:</b></p> <p>Do you support the staff member application for this training</p> <p>Please confirm all statutory and mandatory training is up to date <b>yes / no</b></p> <p>Do you support the hours and the travel, where applicable?</p>

**AUTHORISATION**

Applicant's signature:	<input type="text"/>	Date:	<input type="text"/>
Manager's signature:	<input type="text"/>	Managers name:	<input type="text"/>
Manager's email:	<input type="text"/>	Date:	<input type="text"/>

**PLEASE SEND TO:** [hnf-tr.mentalhealthdivisiontrainingrequests@nhs.net](mailto:hnf-tr.mentalhealthdivisiontrainingrequests@nhs.net)



**Training and Development Panel to Approve/Decline (to be completed by the panel)**

We confirm that the above application has been considered in line with relevant criteria, by the MH Training Panel and the application has been **APPROVED/DECLINED**

Where declined, reason below:

Source of Funding (£333.00 CPD allowance break down of funding to support requested):

Division funding (Team Budget code, sub code 7300)

CMHT Transformation funding (Team Budget Code, sub code 7300)

CPD funding (Mel Barnard to process the order)

Mixed Funding Option (Team Budget Code, sub code 7300)

Date of panel approval:

## SECTION B

### TRAINING CONTRACT FOR MENTAL HEALTH DIVISION

Your professional development is important to us as you, service users and the organisation benefits from the opportunity to increase skills, knowledge and expertise. This contract helps to set out expectations and the support you will get to complete the course successfully so you can use your new skills in your work. Training is of course rewarding and it can also require substantial time, energy and commitment which needs to be planned for.

#### WHEN TO COMPLETE THIS SECTION OF THE FORM

If you are applying for a substantial course which could be meet any one or all of the following criteria:

- Course duration of longer than 6 months
- Cost of £500 or more
- The training will have a significant impact on service delivery or structure
- You, your manager or the training panel thinks that it will be of benefit

#### WHO'S MAKING THIS AGREEMENT?

You, your manager and your professional or clinical supervisor.

#### HOW TO USE THIS DOCUMENT

- Talk this through and complete with your manager/ supervisor when considering applying for a course.

Your name	
Manager name	
Clinical/professional Supervisor name	
Course name	
Start date	
Duration	
Hours per week dedicated to course attendance	
What is the amount of training/study in and out of work over your course period?	
How will the training be used to meet service need?	
Describe any further continual professional development that may be required to maintain competency, licence to practice / accreditation	

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### SOME FACTORS FOR YOU TO CONSIDER AND DISCUSS WITH YOUR LINE MANAGER

- Is it a good time for you to embark on this course career wise but also in relation to your home commitments?
- Do you need to find out more about the course in terms of time commitment and academic rigour required?  
Could you speak to someone who's already done the course?
- Is there coursework to complete? How will you manage time to do that?
- Do you need to find out what it's like to deliver the intervention (if applicable).

What support is needed for you to complete the course successfully? (consider coursework, access to appropriate clients, supervision and attending the course)	
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### YOUR RESPONSIBILITIES AND COMMITMENT

- To attend the course.
- To complete the course.
- To report any extenuating circumstances that may affect your ability to complete the course on time.
- To raise with your manager if managing work/ course / homelife balance becomes difficult, so support can be put in place or a course of action can be taken i.e. to defer the course.
- To attend the regular review and support meetings with your manager and supervisor giving updates as to your progress and how you're applying the training to your work.
- To deliver the aims of the course as agreed below i.e. to provide the intervention as part of your role and /or to plan and deliver a way to disseminate knowledge in a way the benefits the Trust.
- If the course is a year or longer in duration there is an expectation that you stay with the organisation for a year after the course end date to deliver and use your skills in your work place.

What are the agreed outcomes of completing this course? For example, delivering DBT for two days a week/ offering awareness sessions on what you've learnt to your team or division / offering supervision to other staff using your new competencies.	
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### TEAM OR MANAGER RESPONSIBILITIES

- To provide the support outlined in the section below to enable the staff member to benefit as much as possible from the course.
- To provide the support outlined in the section below to enable to staff member to have the time to deliver the intervention / disseminate the knowledge as agreed during and after the course.
- To attend/be jointly responsible for setting up regular review and support meetings to discuss progress and ascertain what support is required.
- To jointly agree and document in the staff member's job plan/appraisal the commitment to delivering the new skill as part of their role i.e. to be a non medical prescriber for 2 days a week.
- To endeavour to adhere to this plan and discuss with the staff member and supervisor if extenuating circumstances or demands on the service impact on the ability for this to be delivered as per job plan.
- Any development relating to this course and the agreed outcomes can be recorded in staff member's appraisal.
- Escalation processes to be agreed if there is disagreement about this i.e. to involve the Service Manager/ General Manager/ Professional Lead or the Division Clinical Lead.
- Hand over any responsibilities to incoming line managers to make sure committed actions are adhered to despite management changes.
- Align development to the Trust strategic priorities.
- Champion the development of this staff member and the investment they have made in developing skills in which the Trust can benefit

What support do you need from your <b>team/manager</b> in order to complete the course? i.e. supervision / travel costs/ access to clients /time to attend the course or do course work/ time to practice intervention.	
What support do you need from the <b>organisation</b> in order to complete the course? i.e. supervision / travel costs.	
After the course what support do you need from your <b>team/manager</b> in order to deliver the intervention? i.e. supervision / access to clients /time to practice intervention/equipment.	
After the course what support do you need from the <b>organisation</b> in order to deliver the intervention? i.e. ongoing post course supervision as part of practice development.	
What support do you need from your professional/clinical supervisor?	

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• **PROFESSIONAL OR CLINICAL SUPERVISOR RESPONSIBILITIES**

- To offer regular supervision to include discussion of the course progress and support needed.
- To help you to think about the clinical application of the course and embed the skills into your practice.
- To attend scheduled review and support meetings with yourself and your manager.

Any further support required from clinical supervisor?	
Any further support or expected input from external clinical supervisor in relation to the course?	

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• **REVIEW AND SUPPORT MEETINGS**

How often will you meet with manager to discuss your progress with the course?	
How often will you meet with your supervisor to discuss your progress with the course?	
How frequently will you have a three way meeting?	
Will the external supervisor be involved in the progress review and if so, how?	

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- COMMENTS AND AREAS NOT COVERED

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**SIGNATURES**

Designation	Name	Signature	Date
Staff member			
Manager			
Professional Supervisor			
Clinical Supervisor			
Other			