

Study Leave Policy

Policy reference – HR25

SUMMARY	Learning, personal development and improvement are at the heart of the organisations values. All staff should have the opportunity to partake in learning and development activities. This policy outlines the eligibility for study leave, how to apply for it, how to apply for funding and repayment required if the training is not completed.
AUTHOR	Joanne Stephenson – Senior Learning and Development Associate
VERSION	Version 4 – Final
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APPLIES TO	All employees
APPROVAL BODY	Senior Management Team of Bradford City and Districts CCG
RELATED DOCUMENTS	Education Training and Development Policy
REVIEW DATE	October 2018

**THIS POLICY HAS BEEN SUBJECT TO A INITIAL EQUALITY IMPACT
ASSESSMENT**

VERSION CONTROL SHEET

Version	Date	Author	Status	Comment
1	10.06.14	Joanne Stephenson	Draft	Amended to reflect new organisation names and responsibilities
2	21.01.15	Joanne Stephenson	Draft	Suggested title change to Personal Development policy Removed reference to KSF. E&D monitoring page included for funding purposes
3	24.06.15	Joanne Stephenson	Draft	Following comments from trade union - title changed back to Study Leave Policy. Section 11 – repayment of financial assistance applied for if employee leaves to either NHS or non NHS employer, is made redundant or does not complete training.
4	29.09.2015	Joanne Stephenson	Final	14.4 – inserted that repayment will not be sought in exceptional circumstances when agreed by a member of SMT Amendments made to the policy and taken to the West Yorkshire HR Policy Sub Group on 29.09.2015 to consult on changes.
Final	02.12.2015	Tazeem Hanif	HR Lead	Ratified at the Social Partnership Forum

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1. PURPOSE

This document sets out the CCGs approach to study leave policy and procedures. This should be read together with other relevant CCG policies, procedures and guidance. The CCG considers learning, personal development and improvement to be at the heart of the organisations values. All staff should have the opportunity to partake in learning and development activities. This policy outlines the eligibility for study leave, how to apply for it, how to apply for funding and repayment required if the training is not completed.

2. SCOPE

The policy applies to all employees of the CCGs and supersedes all previous policies on study leave.

NHS Bradford City and Bradford Districts CCGs are committed to investing in the development of all employees in order to create a learning culture which stimulates an enthusiasm for raising standards in the quality of care we provide and lifelong learning.

To achieve this we encourage everyone in the organisation to take an active role in developing their own competence and skill to improve their contribution to service delivery. The values of the organisation clearly outline the organisation's expectations of all staff. Learning, personal development and improvement are at the heart of these values.

A Joint Development Review (JDR) is a meeting between employee and their line manager where a review of performance against personal objectives and key achievements is held. This meeting can also be referred to as a Personal Development Review (PDR.)

A personal development plan (PDP) is also part of this discussion where training and/or development needs are agreed and recorded.

3. EQUALITY STATEMENT

In applying this policy, the organisation will have due regard for the need to eliminate unlawful discrimination, promote equality of opportunity, and provide for good relations between people of diverse groups, in particular on the grounds of the following characteristics protected by the Equality Act (2010); age, disability, gender, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, and sexual orientation.

Learning activities will support the organisation's business plans, local delivery plans and corporate strategies. Learning activities will be supported on the basis of need for the individual, team, the service and the organisation. Stakeholder's needs and patient outcomes are an important driver of the learning agenda for staff.

The study leave policy aims to ensure a fair and equitable process for requesting, approving and funding study leave which is understood and followed by managers and staff.

The policy applies to all staff employed by the organisation. Managers have a key responsibility to enable all staff; including staff working part time hours have access to relevant learning and development opportunities.

Where possible, training events will be commissioned, and delivered to meet the needs of staff working different working hours. Flexible approaches are encouraged to enable staff to attend training outside of their usual working hours as it is not always possible for training programmes to be delivered outside of the hours of 9am-5pm.

4. ACCOUNTABILITY

The Chief Officer is accountable for this policy.

5. IMPLEMENTATION & MONITORING

The Senior Management Team is responsible for formal approval and monitoring adherence to this policy. Following ratification the policy will be disseminated to staff via the organisations intranet.

The policy and procedure will be reviewed periodically by Human Resources in conjunction with managers and Trade Union representatives. Where review is necessary due to legislative change, this will happen immediately.

6 DEFINITION OF STUDY LEAVE

In broad terms, study leave can be defined as a learning initiative which requires an individual to be absent from their usual place of work for a defined period of time. Study leave is commonly taken for attendance at training courses (internal and external), conferences, seminars etc. Study leave may also include research, secondments, placements, higher/further education programmes or time off for revision, completion of assignments and/or taking examinations. All study leave must be agreed with the manager (See Section 9 and Appendix 1 for further guidance)

Increasingly, there are learning and development opportunities which take place 'on the job' for example NVQ assessment, clinical supervision, shadowing or mentoring. Study leave may not be required but time will need to be discussed and approved by an individual's line manager to ensure that the individual is given time to participate in such activities. Not all learning activity will result in a staff member requiring study leave or financial support.

7 RESPONSIBILITIES

7.1 JOINT RESPONSIBILITY

Good working relations are vital for the CCGs to operate successfully and provide its essential services. Management, trade unions and employees accept the responsibility of working together on issues in good faith and with goodwill with the shared intention of facilitating good working relations.

7.2 MANAGEMENT RESPONSIBILITY

Management is required to manage and to act fairly and consistently. Management is responsible for ensuring that the policies and procedures are disseminated effectively and observed by all employees.

Managers should facilitate discussions and agree PDP as part of the JDR process. Development needs and associated development activities should be agreed as part of this discussion and noted on the individual's PDP.

Personal development plans should align to organisational/team objectives. This will guide managers in their response to applications for study leave/engagement in learning activities and help identify priorities for learning.

Responsibility for staff accessing learning and development activities lies with the manager of the team. Study leave and funding cannot be granted as a right. Mandatory training must be kept up to date as a priority before further study leave is granted. Consideration can then be given to the individual's professional and/or personal development/learning needs.

Managers are responsible for agreeing study leave and expenses in line with criteria for approval outlined in section 9 in line with budgetary resources. A director's opinion should be sought where applications do not fall into any of these criteria.

Managers are responsible for keeping records of their staff time off the job whilst engaged in learning activities and to ensure that staff are encouraged and supported in applying new learning/skills in their job

7.3 EMPLOYEES RESPONSIBILITY

Employees have a duty to comply with the policies and procedures. If an employee has any questions or concerns about these they should raise these with their line manager.

Employees are expected to update their job related knowledge and skills on a regular basis and, within the Joint Development Review (JDR) process, to identify their own learning needs. Employees are responsible for taking action to update and develop their

knowledge and skills in response to learning needs identified in their Personal Development Plan (PDP). Skills which are identified as mandatory for job posts must be kept up to date as a priority.

Once study leave has been agreed and confirmed, employees are responsible for attending and completing the learning activity to the best of their ability. (Only genuine illness, personal crisis or management approved staffing emergency should prevent attendance). Following the learning activity employees are responsible for applying knowledge gained on return to their job and to share learning with other colleagues, as appropriate.

7.4 LEARNING AND DEVELOPMENT RESPONSIBILITY

Learning and Development play a key role in ensuring the application of the Study Leave Policy including:

To work with managers to identify training needs. Information from a variety of sources is used including personal development review, personal development plans, organisation's business and service development plans, staff survey and individual requests.

Attendance on mandatory training will be monitored in partnership with relevant managers and trainers in order to ensure that the organisation is fulfilling its legal obligations and managing risks.

Learning and Development are responsible for:

- Providing advice and support to managers and staff on the application of the policy.
- Providing training data to relevant reference groups in line with agreed timescales.
- Carrying out an assurance role, ensuring that learning activities take place in line with agreed strategies and service delivery and improvement plans and to meet the needs of assurance frameworks (both internal and external).

7.5 SENIOR MANAGEMENT TEAM

The Senior Management Team is responsible for:

- Developing and reviewing the organisation's strategy and implementation plan for learning – including formal and informal training, education and development.
- Monitoring progress against the strategy and implementation plan.
- Ensuring that the strategy takes account of statutory, legislative, professional and regulatory requirements and current good practice.
- Ensuring the establishment of an appropriate infrastructure for learning and development.
- Ensuring that learning and development outcomes focus on improving commissioning.
- Engaging with all sectors of the organisation including employed staff, contractors and stakeholders, identifying pertinent drivers and priorities. Guiding and informing the work of the Organisational Development Forum

8. JOINT DEVELOPMENT REVIEW (JDR) PROCESS

The Joint Development Review, is the overall appraisal and development process that managers/team leaders at all levels of the organisation use to help them get the best from their people. It is expected that everyone has a JDR at least once a year and twice in their induction year. The organisation JDR is a regular two-way planning and review process that enables every member of staff to know and understand what is expected of them in their job and to be given support by the organisation to achieve this. This links directly to the Joint Development policy.

The JDR process is used to:

- discuss and define job role purpose and expectations
- integrate personal, team and organisation objectives
- identify steps towards achievement of objectives
- identify areas of personal performance which can be improved
- agree plans to support appropriate personal learning and development needs

Both the manager and the member of staff have an equal responsibility to ensure the process takes place correctly and fairly. The JDR gives all staff the opportunity to identify any learning necessary to enable them to carry out their jobs safely, competently and effectively with reference to the organisation's business plans and objectives and to the most appropriate current and/or up to date practice. Competent employees are encouraged to develop themselves within and beyond their present roles.

9. CRITERIA FOR APPROVAL OF STUDY LEAVE/FINANCIAL SUPPORT

All applications for study leave will be assessed using the following criteria:-

- a. that statutory/mandatory training is completed as a priority above all other development activity.
- b. the learning activity is identified in the individual's personal and/or professional development plan and is of benefit to the individual, the team and the organisation. Identified objectives for the learning activities must be taken into account when reviewing potential benefits.
- c. cost of the learning activity is not excessive in relation to its apparent value and that resources are available to support the application. This is particularly relevant where commitment to financial support is for more than 1 year.
- d. that the individual has the capacity to benefit from the learning activity as part of their personal or professional development (e.g. continuous professional development.)
- e. there is availability of resources and that the individual can be released. Careful consideration must be given before approving day release/block release courses to ensure continuation of service can be achieved. Day release/block release can have significant impact on colleagues and further potential additional costs.
- f. due regard is paid to the amount of study leave previously granted to the individual concerned.
- g. there is evidence of previous programme evaluation. Where this is not available,

further information should be sought.

- h. that every effort has been made to apply previous learning to developing services.
- i. that there are no other relevant alternatives to support learning and development (e.g. in-house events, scholarships, funded places.)

Approval from a member of SMT should be sought where applications do not fall into any of these criteria.

Where more than 1 person has applied for study leave related to the same learning activity, account should be taken of the study leave recently taken (e.g. within the last 12 months) If there is still little difference, consideration should be made of each of the criteria noted above. Consideration should be given to identifying priority training need in line with service delivery and skills development needs.

It is important that plans for individual study leave are discussed within the broader team so that there is transparency of decision making and that the team are aware of the relevance of the learning activity to service development. Equally, this approach should enable plans to be made for staffing levels, as necessary.

10. STUDY LEAVE PROCEDURE

- a. Confirm the cost of the study leave activity.
- b. Identify the source budget to support study leave, where funding is required. This is particularly important if a central organisation budget is required to fund a learning activity.
- c. Agree the level of financial/leave support that the organisation will provide to help study leave to take place. If the amount allocated exceeds the training budget per head, authority must be sought from a member of SMT. Every business case will be reviewed on a case by case basis.
- d. Inform the training/development provider who the invoice should be addressed to (i.e. the holder of the source budget.)
- e. Manager and staff member to complete and sign the Further/Higher Education Approval form. An electronic copy of the form to be sent to Learning and Development
- f. Review learning activity at the next JDR meeting after the study leave has taken place.

11. FINANCIAL SUPPORT AND LEAVE ARRANGEMENTS

Study leave and expenses may be granted only if the application meets the criteria outlined in section 9. Appendix 1 outlines guidelines for levels of financial support and study leave arrangements for a range of learning categories.

The organisation reserves the right to grant full or partial support for learning activities depending on the reason for learning (e.g. mandatory, statutory, Skills for Life, Personal Development, Career Development), type of learning activity and how essential it is for the individual, service and CCG. Criteria for this are defined in 11.1 and 11.2 below:

11.1 Full support

Full support includes paid leave with fees and expenses. This is normally given where learning or development is considered essential to the job or for mandatory/statutory training. This includes learning to support specific approved developments or organisational goals or where training is being undertaken at the request of the individual's manager. Learning activities which meet these criteria could attract 100% reimbursement subject to the availability of resources. As part of full support provided, individuals will receive payment due for the days of the course/programme/learning activity or for the equivalent shifts not worked as a consequence of attendance. Pay will be made at basic rate.

11.2 Partial support

Partial support will normally be provided where learning and development is considered to be beneficial to both the individual, their job or for career progression. The learning activity should be relevant and advantageous but not mandatory. A level of personal contribution is required to reflect the personal gain from the learning. This is outlined in Appendix 1.

Where the learning activity is not considered to form part of an agreed personal or career development plan, other combinations of partial support may be available. This may include:

1. Paid leave with expenses only
2. Paid leave with fees only
3. Paid leave only
4. Unpaid leave with fees and expenses
5. Unpaid leave with expenses only
6. Unpaid leave with fees only
7. Unpaid leave only

11.3 Sources of funding

Training, education and development opportunities are funded from a variety of sources, which include the following:

- **Corporate Training Budget:** This budget supports a number of development programmes such as mandatory training, leadership and management development, strategic development forums, corporate training programmes and attending conferences.
- **Team Training Budgets:** This includes support for personal and career development programmes such as attendance at internal courses which are non-mandatory which may attract a cost, external courses and conferences, seminars, further and higher education programmes. Financial support and leave arrangements are outlined in Appendix 1.

- Health Education Yorkshire and the Humber (HEYH) The organisation accesses monies from HEYH to support professional and personal development programmes. HEYH supports opportunities for funding to support continued professional and professional development.
- National Vocational Qualifications (NVQ) – The organisation could access funded places through the NHS/LSC Compact agreement. These monies are for staff working in both clinical or non-clinical areas and include NVQs such as: care, administration and customer care.
- External funding: the organisation welcomes opportunities to take advantage of external funding to support learning and development. This is usually available through funded places on externally led learning programmes (e.g. funded places in Higher Education programmes)

11.4 Learning materials and resources

Financial support for course manuals and essential text books may be granted, where they are not currently available through libraries. Further information on this is available in Appendix 1.

Any books purchased should be key texts for the learning programme and must be returned to the CCG at the end of the programme for use by other individuals.

11.5 Examinations

Employees are entitled to leave for the purpose of taking exams for an approved course of study. This must be negotiated with the manager and individual dependent on the learning category. Further information on this is available in Appendix 1.

It is recognised that employees cannot control the date of examinations however, due consideration should be given to work requirements when arranging study leave and should be agreed with the manager.

11.6 Travel and subsistence expenses

Where approved, reimbursement of travel expenses to individuals using their own transport will be in line with the organisation's Expense Policy. Managers are expected to pay for travel expenses from department budgets. Groups of staff attending the same course at the same time should share transport wherever convenient.

Travel and subsistence costs are reimbursed at lease car or mileage rates outlined in the [Agenda for Change Terms and Conditions Handbook](#) (Annex L and N.) Rail fares will be reimbursed at standard class rates. Employees will be expected to take advantage of reduced fares wherever possible.

12. PERSONAL AND CAREER DEVELOPMENT SUPPORT

Support for personal and/or career development is available subject to the criteria for approval outlined in section 9 and available resources. Personal and/or career

development should be of benefit to the individual, the service and to the organisation.

Development opportunities which fall into this category vary and can include learning activities such as study days, conferences, seminars, further and higher education programmes.

Higher/Further Education programmes includes learning such as Higher Degrees i.e. MBA, MA, MSC, PhD and/or further education programmes which take place over a number of months/years and require significant funding and/or study leave support.

12.1 Support for Higher/Further Education programmes

Higher/Further education programmes should be discussed and agreed between the manager and staff member in line with the JDR process (see section 8) and Study Leave approval criteria (see section 9). The organisation reserves the right to refuse to support applications for Higher/Further Education programmes.

Employees should complete, in full, a Further/Higher Education Approval form (Appendix 2) and attach all relevant supporting documentation/information. The completed form should be forwarded to their manager for consideration at least four weeks prior to the learning event. All relevant parts of the Further/Higher Education Approval form must be completed.

On occasion, it may not be possible to submit a request for study leave four weeks prior, but routinely, applications should be made to the manager at the earliest opportunity.

Failure to do so may result in the application not being processed in time, particularly if course fees are to be paid by the organisation.

Completed copies of the Further/Higher Education Approval form must be returned to Learning and Development for processing and recording on personnel records.

Continuation to the next academic year of the course should also be discussed and supported by your manager. Approval is normally dependent on successful completion of the previous year.

13. NON ATTENDANCE (CANCELLATIONS/FAILURE TO ATTEND WITHOUT NOTIFICATION)

If a member of staff is unable to attend a programme, they should contact the training organiser as soon as possible (internal or external). This is usually the person who provided joining instructions.

For all internal courses the reason for non-attendance will be requested. In the event of a member of staff not attending a course for which they have booked for whatever reason, their service manager will be advised. If a member of staff is unable to attend a course, their name will not automatically be transferred to the next available date, as the next course may

be fully subscribed. Information about availability of places will need to be sought from the training organiser/provider.

Training course programmes take many hours of careful planning and are designed to meet specific outcomes which are for the benefit of individuals and the whole service, and ultimately patient/client care. The organisation recognises that, on occasion, cancellation of attendance is essential where the delivery of services is at risk. Decisions to cancel should be balanced against service need, individual skill development and financial implications of non-attendance.

14. REPAYMENT OF FINANCIAL ASSISTANCE

14.1 If the employee resigns to go and work for a non NHS employer or is dismissed

There is an expectation that employees remain with the CCG after completion of training. In the event of an employee leaving the organisation of their own accord to work for a non NHS employer or as a result of dismissal under the disciplinary procedure, repayment of any financial assistance for personal/career development activities will be required as follows:

An employee who undertakes a course where £1800 is supported by the organisation will be required to repay the equivalent number of months cost of the course that they have not stayed in the organisation to fulfil the 18 months criteria

E.g.

1 month after completing course	$17/18 \times \text{£}1800 = \text{£}1700$
6 months after completing course	$12/18 \times \text{£}1800 = \text{£}1200$
17 months after completing course	$1/18 \times \text{£}1800 = \text{£}100$
18 months after completing course	$0/18 \times \text{£}1800 = 0$

14.2 If the employee leaves to undertake alternative NHS employment

Employment with another NHS employer will only be accepted where documentary evidence of the alternative employment is provided by the employee.

Reclaim of monies will not be sought where the employee undertakes alternative employment with another NHS organisation. The CCG recognises that opportunities should be available to employees without fear of financial penalty.

14.3 If the employee is made redundant

If redundancy occurs any outstanding monies will not be reclaimed from the employee.

14.4 If the employee does not complete any paid for training or development

Repayment will be sought from employees who do not attend agreed 'paid for' events or who withdraw from completion of a development programme without prior agreement. Repayment will not be sought in exceptional circumstances when agreed by a member

of SMT

Note: Repayment terms for financial assistance do not apply for staff on fixed term contracts.

15. MONITORING AND EVALUATION

In order to evaluate the way in which resources are being used, to ensure equity of distribution and to assess the impact of learning activities on the business objectives of the organisation, monitoring will take place through the JDR process and budgetary review.

Individuals have the responsibility to apply new learning to their work practice. Managers have the responsibility to help individuals transfer their new learning (understanding, knowledge, skills and confidence) to everyday work.

The JDR meeting is the opportunity for managers to review information relating to learning activities and define the impact the learning has had. This information is noted on the Personal Development Plan.

Information on training activities is available from the Learning and Development team. This can be provided in both summary and detailed format. Reports on access to training and development will be provided to the organisation as part of their assurance measures. This information will also be shared with other relevant reference groups as required.

Where evaluation information has been requested, this should be completed and returned by the due date.

Appendix 1 - Financial Support and Leave Arrangements

Category Type	Course Fees	Books	Travel and subsistence	Study Leave	Exams
Mandatory/Statutory	100%	100% up to £100 if books not available in libraries	In accordance with rates identified on Agenda for Change terms and conditions and expenses policy Shared cars to be encouraged where possible	Leave with full pay for attendance during course hours	100% fees; 3 resits allowed; 1 day's leave for exams of 3hrs and above ½ day's leave for exams of below 3hrs
Skills for life (numeracy, literacy etc)	100%			Leave with full pay for attendance during course hours	100% fees; 1 resit allowed; 1 day's leave for exams of 3hrs and above; ½ day's leave for exams of below 3 hrs.
Personal Development (Job related)	75%			Leave with full pay for attendance during course hours	75% fees; 1 resit allowed; 1 day's leave for exams of 3hrs and above; ½ day's leave for exams of below 3 hrs. Where assessment of achievement is by assignment and not exam, study leave may be granted at the discretion of the manager. Where this is granted, study leave must be matched by annual leave.
Team Development	100%			Leave with full pay for attendance during course hours	N/A

Appendix 2 – Further/Higher Education Approval Form

You should complete this form if you wish to undertake a course of further or higher education and use it in discussion with your manager. If your request is supported, please ask your manager to sign at the bottom of the form. (Refer to study leave policy for guidance on funding).

Personal Details

First Name: _____ Last Name: _____

Job Title: _____ Work Location: _____

Work Telephone: _____ Work Email: _____

Further/Higher Education course details

Course Title: _____ Education Provider: _____

Duration of course: _____ Start Date: _____

Is this course for more than one academic year? _____

Study Leave expenses:

Cost category	Details	Estimated Amount	Manager approval (yes/no)
Course Fees (tuition)			
Registration Fees			
Examination Fees			
Learning materials (books)			
Leave requirements (time out of the workplace)			
Type of leave (block, day release)			
Other			

Note: In the event of an employee leaving the organisation of their own accord or as a result of dismissal under the disciplinary procedure, repayment of any financial assistance for personal/career development activities will be required. Repayment terms are outlined in section 14 of the Study Leave policy.

Learning Objectives: Summarise below the key benefits of the course for yourself and the organisation. Describe links to performance objectives

I have read, understood and accept the conditions of the Study Leave Policy, the following must be complete

- All mandatory/statutory training must be up to date
- Must be identified as an organisational need

SIGNED: (Employee) DATE.....

SIGNED: (Manager) DATE.....

Please return a signed copy of this form to hrrsolutions@bdct.nhs.uk

Appendix 3

Equality Impact Assessment

Title of policy		Study Leave Policy	
Names and roles of people completing the assessment		Joanne Stephenson Senior L&D Associate	
Date assessment started/completed		20.05.2015	24.06.2015/Review date October 2018
1. Outline			
Give a brief summary of the policy	Learning, personal development and improvement are at the heart of the organisations values. All staff should have the opportunity to partake in learning and development activities. This policy outlines the eligibility for study leave, how to apply for it, how to apply for funding and repayment required if the training is not completed.		
What outcomes do you want to achieve	The policy to comply with statutory requirements and complies with NHS Litigation Authority Standards and best practice.		
2. Analysis of impact			
This is the core of the assessment, using the information above detail the actual or likely impact on protected groups, with consideration of the general duty to; eliminate unlawful discrimination; advance equality of opportunity; foster good relations			
	Are there any likely impacts? Are any groups going to be affected differently? Please describe.	Are these negative or positive?	What action will be taken to address any negative impacts or enhance positive ones?
Age	No		
Carers	No		
Disability	No		
Sex	No		
Race	No		
Religion or belief	No		

Sexual orientation	No		
Gender reassignment	No		
Pregnancy and maternity	No		
Marriage and civil partnership	No		
Other relevant group	No		
If any negative/positive impacts were identified are they valid, legal and/or justifiable? Please detail.	No anticipated detrimental impact on any equality group. The policy is applicable to all employees and adheres to the NHS Litigation Authority Standards, statutory requirements and best practice. Makes all reasonable provision to ensure equity of access to all employees. There are no statements, conditions or requirements that disadvantage any particular group of people with a protected characteristic.		
4. Monitoring, Review and Publication			
How will you review/monitor the impact and effectiveness of your actions	Will be able to monitor applications due to small numbers involved to ensure that there is no detriment suffered by any protected characteristic.		
Lead Officer	Joanne Stephenson	Review date:	May 2018
5. Sign off			
	Fiona Stephens		
Director	Associate Director of Corporate Affairs	Date approved:	September 2015