

STUDY SPONSORSHIP POLICY



Any study sponsorship request must be agreed by the relevant Line Manager and by Human Resources and the appropriate Study Sponsorship Form completed and submitted



Any study sponsorship request must be relevant to the individual's role and objectives, and to team and organisational objectives



The relevant Line Manager and Human Resources must be provided with the individual's record of attendance, regular progress reports, confirmation of course completion and a copy of their certificate of success or completion.



All individuals must repay any pro-rata costs if they fail to complete the course successfully, or leave within two years of course completion.



Individuals must not be absent from the workplace for more than half a day per week.

1. POLICY STATEMENT

It may occasionally be appropriate for some individuals to undertake Further Education to enhance their contribution to Advance's work. Such studies should be on subjects directly related to their present role, or relevant to assist them in developing their immediate careers.

2. SCOPE

This policy applies to all permanent staff who wish to apply for study sponsorship.

3. CRITERIA FOR FINANCIAL SPONSORSHIP

The following criteria must be met in order for sponsorship to be considered:

- The course/study must be relevant to the applicant's duties and to the organisation.
- There must be clear business reasons for the individual to undertake the course/study (eg, it is a stated requirement in the job description/person specification to gain a professional qualification, it would be beneficial to the organisation/business segment/department/scheme, it links into the overall business plan, etc).
- The course/study must lead to improved effectiveness and the individual must be able to apply elements of the study to his/her current role and share any relevant learning with their team.

- The course/study must have been identified and agreed as part of a personal development plan, showing how the course will enhance the development and career of the individual.
- The individual will not be absent from the workplace for study/college attendance for more than half a day per week. Any time requirement must be negotiated and agreed with the Line Manager before the start of the course (see Section 4.2 for *Time Off for Study*).
- The individual's previous training record will be taken into account.
- The individual must be able to demonstrate that they are able and willing to contribute 10% of the course and examination fees in order to show their commitment to the studies.

4. GENERAL CONDITIONS

4.1 The Course/Study

Employees are responsible for researching and determining the appropriate course/means of study.

Employees must pursue the most cost-effective method of study, providing evidence that all possible sources of costs have been researched and recommending the best value for money. The employee must also contact the educational establishment to assess the suitability of the course and the availability of a place.

Each employee must provide evidence of how the course/study links to their current role or next confirmed role.

Each employee must provide evidence of how the course/study fits in with their appraisal and personal development plans.

It is important that if employees are considering a mixed studies course, such as those offered by The Open University, that each module taken fits the criteria for the scheme.

4.2 Time Off for Study

Some courses may require employees to be off work to attend course lectures. Employees may take a maximum of half a day per week provided that the study is taken at an approved educational establishment. Satisfactory records of attendance and personal conduct should be received from the establishment (100% attendance is required in the case of day and part-day release, subject to certified sickness absence and unavoidable personal circumstances).

Subject to the needs of the organisation, and with the Line Manager's approval, individuals may have their duties arranged so that they can attend classes, seminars, etc. However, this is discretionary and individuals must ensure that this is discussed and agreed with their Line Manager well in advance.

At all times, operational priorities and the needs of Advance will take precedence.

Study Leave – up to five working days' study leave may be granted by Line Managers in any one academic year, provided that each day, or part-day granted, is matched on a one-for-one basis by the individual using his/her own time/annual leave.

Residential School – a maximum of five working days per year will be allowed for residential school, if this is a requirement of the course. This is in addition to Study Leave.

On days when the course does not run, eg, term breaks, employees are expected to attend work.

4.3 Time Off for Examinations

One working day per exam will be granted up to a maximum of five working days in any one academic year. This is in addition to Study Leave. Any student re-taking an examination will be expected to take annual leave for this purpose.

4.4 On Completion

It is the responsibility of the employee to inform their Line Manager and Human Resources of the completion, or delay in completion, of any course. In the event of a delay, or deferral, the Line Manager and Human Resources must be informed, giving reasons and the proposed revised timescale for completion.

On completion, the employee must submit a copy of their certificate to Human Resources.

5. FINANCIAL ASSISTANCE

5.1 Course and Examination Fees

Employees may be awarded up to 90% of the course and examination fees, dependant on available resources, such as finances, and the relevance of the qualification, eg, if a qualification deemed relevant to an area of work equates to the equivalent of NVQ Level 3 and the applicant wishes to undertake a course equivalent to NVQ Level 4, if approved, the difference in the cost will be met by the applicant.

Payment of approved course fees will be met on receipt of an invoice from the educational establishment which should be addressed directly to Advance. The invoice must be received in good time in order to be settled before the course begins, if that is the requirement of the course.

The costs of re-sitting examinations will not be met by the organisation except where exigencies of the service prevent employees sitting exams.

Once an employee has been granted financial assistance for a particular course, any proposed change of study/course must be discussed with their Line Manager and Regional (or Senior) Manager and may be subject to a further application.

If an employee wishes to receive financial assistance for a course that runs for more than one year, the employee must make this clear in their application and ensure that their Line Manager, Regional (or Senior) Manager and the L&D Business Partner are in agreement. The same pro-rata repayment scale outlined in Section 5.7 below will apply should the employee leave Advance within 24 months following successful completion of the course.

All agreed funding is subject to withdrawal if the employee either performs poorly on the course, or otherwise fails to meet the criteria stated in this policy, or in the L&D policy.

Books and Course Materials

Advance will reimburse the employee 100% of the cost of essential books and course materials for the approved course up to a maximum of £150 per year. The material will remain the property of Advance and should be returned to Human Resources on completion of the course.

5.2 Travelling and Subsistence Expenses

Employees will be expected to meet any travelling and subsistence expenses incurred.

5.3 Maternity Leave/Long-Term Sickness Absence

Employees who are absent from work due to maternity leave or long-term sickness may temporarily defer their studies until they return to work, depending on the course and educational establishment requirements. Employees must inform their Line Manager, Regional (or Senior) Manager and Human Resources immediately if they find themselves in this situation.

It is the employee's responsibility to ascertain whether or not deferring their course would incur additional fees. If this is the case, the employee must inform their Line Manager and Regional (or Senior) Manager as soon as possible. Whether the employee or Advance meet any additional costs is at the discretion of Advance.

5.4 Membership of Professional Fees

Advance will pay any membership fees of professional organisations if this is a pre-requisite for qualification training. They will not, however, continue to pay for this once the course has been completed and it will then be the employee's responsibility to meet the cost of this.

5.5 Termination of Employment

If an employee is dismissed from his/her employment for any reason, Advance will reclaim any monies paid to the employee under this scheme from the employee's salary in accordance with their contract of employment.

5.6 Reimbursement of Fees

Advance will request repayment of all financial assistance if:

- The employee, without good reason, fails to complete the course of study satisfactorily
- The employee, without good reason, re-sits part or all of the course and fails
- The employee chooses to withdraw from the course (except in cases of maternity leave, long-term sickness absence, as above, or in the event of redundancy (see below)
- Attendance and/or course work is poor, which results in a fail, without good reason

In all other cases, the following repayment scale will apply to an individual leaving Advance during or within two years of completion of the training, except in the case of redundancy:

Within 12 months following completion:	100% reimbursement
12 to 16 months following completion:	75% reimbursement
17 to 20 months following completion:	50% reimbursement
21 to 24 months following completion:	25% reimbursement

All applicants will be asked to complete an agreement that any repayable funds can be deducted from the employee's final salary. If the amount owed to Advance is more than the final salary payment, a payment schedule will be agreed between Advance and the employee, along with a confirmation letter signed by both parties.

6. METHOD OF APPLICATION

Employees wishing to apply for sponsorship should complete the Application for Study Sponsorship Form (available on the intranet → Department→Human Resources→Forms→General HR Forms) for consideration, along with any supporting information. The application must be supported by the employee's Line Manager and Regional (or Senior) Manager and employees are responsible for ensuring that their application is submitted to their Manager(s) in a timely manner. If an employee's application for study sponsorship is not supported, for any reason, by either their Line Manager or Regional (or Senior) Manager, then approval for financial assistance will not be given.

All applications will be validated to ensure they meet the selection criteria. The Line Manager, Regional (or Senior) Manager and Human Resources will take into account the financial constraints of Advance, previous financial sponsorship awarded and the priorities of training needs across the organisation.

If an employee is awarded financial assistance under this scheme, they will be required to sign a variation to their Terms and Conditions of Employment indicating their acceptance of the Study Sponsorship Policy.

Applicants will be informed of the reasons for any refusal to support the application. All applicants will be notified of the outcome of their application as soon as possible.

Applications must be approved no later than six weeks before the beginning of study and the course to be undertaken must begin within the financial year in which the application is made.

Policy owner	Learning & Development Business Partner
Date written	March 2016
Approved by	Director of Human Resources
Date of approval	June 2016
Who was consulted	Assistant Director HRBP and HR Business Partners
Related Forms	Study Sponsorship Form, see HR Department on Intranet