Learning and development leave policy

Area Organisational Learning Unit Policy Directive

Area Policy Directive PD137

June 2007

Not applicable

Not applicable

Corporate and Clinical Governance, Clinical Operations, Clinical Streams, Corporate Services, Population Health, Planning and Performance, Area Workforce Development, Corporate Communication, Nursing and Midwifery Services.

The purpose of this policy is to provide guidance to staff and managers regarding eligibility for and granting of learning and development leave.

Leave for learning and development applies to external courses offered by educational institutions and registered training organisations in addition to conferences, seminars and short courses.

COMPLIANCE WITH THIS AREA POLICY DIRECTIVE IS MANDATORY
1. PURPOSE & SCOPE

The purpose of this policy is to provide guidance to staff and managers regarding eligibility for and granting of learning and development leave.

Leave for learning and development applies to external courses offered by educational institutions and registered training organisations in addition to conferences, seminars and short courses.

Learning and Development Leave is not required for the following types of learning activities which are undertaken by staff on a routine basis, and at which staff are considered to be “on-duty”:

- “In-house” courses or learning activities; and
- Mandatory training and education.

Refer to Attachment 1 for a summary of the benefits and support available for Learning and Development activities.

NOTE: This policy does not apply to staff covered by awards or determinations that specify study leave arrangements, i.e. Visiting Medical Officers (VMOs), Senior Medical Practitioners or Department of Health employees. See ‘Staff Specialists Training, Education and Study Leave (TESL) – New Funding Entitlement 2006-2007, PD2006_067’ for additional information.

2. RESPONSIBILITIES

Chief Executive and Directors of South Eastern Sydney Illawarra Health (SESIH)

Responsible and accountable for:

- Ensuring the implementation of the Learning and Development Leave policy across SESIH.

Hospital Network General Managers / Clinical Stream Directors

Responsible and accountable for:

- Ensuring implementation of the Learning and Development Leave policy within Site / Facilities and Services of SESIH.

Managers, Supervisors, Team Leaders

Responsible and accountable for:

- The effective promotion, support, and application of the Learning and Development Leave policy within their area(s) of responsibility;
- Ensuring employees understand the procedures to follow when applying for Learning and Development leave;
- Ensuring employees are aware of the feedback mechanism for the dissemination of information acquired as a result of attending a Conference Seminar or Short Course;
- Applying equity principles in decision making in relation to applications for Learning and Development Leave;
• Advising employees of the review procedures relating to non-approval of Learning and Development Leave.

**Employees of the Health Service**
Responsible and accountable for:
• Understanding the procedures to follow when applying for learning and development leave;
• Understanding the feedback mechanism in place for the dissemination of information acquired as a result of attending a Conference, Seminar or Short Course.

3. **REFERENCES**

3.1 **External References**
• NSW Health Learning and Development Leave Policy - PD2006_066
• New Funding Entitlement 2006-2007 - PD2006_067
• NSW Health Awards and Determinations
• NSW Health Learning and Development Policy - PD2005_255

3.2 **Internal References**
• SESIH Mental Health Program Workforce Strategic Plan: 2006-2011;
• SESIH Amalgamation plan for Organisational Learning, January 2007.
• SESAHS Travel Package for all Staff (Other than Senior Medical Practitioners) SES_TravelPackageGeneralStaff.pdf (Under review)
• Illawarra Travel Pack: Area P-HR-07, AreaP-HR-07TravelPackProcedure.pdf (Under review)
• SESIH Health Service, Mandatory Training Framework.

4. **DEFINITIONS**

<table>
<thead>
<tr>
<th>Area</th>
<th>South Eastern Sydney Illawarra Health</th>
</tr>
</thead>
<tbody>
<tr>
<td>Educational institutions</td>
<td>Those institutions accredited to provide undergraduate and/or postgraduate tertiary studies that culminate in a recognised academic and/or professional qualification including a degree, diploma or certificate.</td>
</tr>
<tr>
<td>Learning activities</td>
<td>Activities that enhance a staff member’s capacity to contribute to Organisational goals. This includes tertiary study, conferences, seminars, workshops or short courses conducted by a relevant professional body or by the employer. Staff members may make use of learning and development leave to attend learning activities, or they may be attended on an ‘on duty’ basis.</td>
</tr>
<tr>
<td>Learning and development leave</td>
<td>Leave granted to undertake tertiary studies at an accredited educational institution (including leave for examinations), or leave granted to attend external activities, such as</td>
</tr>
</tbody>
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Mandatory training and education
Learning activities that aim to develop those skills required by the SESIH in response to legislative, policy and/or service delivery needs. SESIH will determine whether a particular learning activity is mandatory based on external stimuli, such as government grants or legislation; Department of Health directives, internal organisational factors, temporary skill shortages; or required training: for example, fire safety, infection control, and occupational health and safety training. Staff attending mandatory training and education, are considered to be “on duty”. See “SESIH Mandatory Training Framework” for more information.

Registered Training Organisations
Those institutions that offer accredited training which lead to nationally recognised qualifications.

Tertiary Education
Comprising higher (university) education and Vocational and Technical Education (VTE).

5. POLICY

5.1 PRINCIPLES
SESIH aims to be a ‘Learning Organisation’. Learning Organisations have structures and processes in place to encourage and reward continuous learning. A learning organisation also recognises that its people are its most valuable asset, and every individual is encouraged and supported to locate and create his/her own learning opportunities.

Our Health Service aims to facilitate access for its employees to relevant learning opportunities by establishing structures and processes that enable staff to learn from actual work situations. In this way the performance of all staff and their contribution to the Area in meeting its strategic objectives will be improved.

Sponsored learning and development activities must provide benefits to the organisation as well as the individual, and be consistent with the Area’s strategic plan. As such priority will be given to those activities that facilitate the achievement of the Area’s strategic goals.

Within SESIH there is both a corporate and personal responsibility for assessing, achieving and maintaining a high level of organisational, team and individual competence to ensure the safe and effective delivery of health care. Similarly responsibility for learning and development needs to be shared between the
organisation and the individual. Staff are expected to pursue their professional development using both their own and the Area’s resources.

5.2 ELIGIBILITY
Access to learning and development leave is at the discretion of the appropriate Department Manager and/or Delegated Authority. It is made available to promote the development of a highly trained, skilled and versatile workforce, which is responsive to the requirements of government and health service delivery.

Both permanent and temporary staff (whether full-time or part-time) are eligible to apply for leave. Part-time staff are granted leave on a pro-rata basis.

Casual staff are not eligible for this form of leave.

5.3 PRIORITIES FOR SUPPORT OF LEARNING AND DEVELOPMENT LEAVE

5.3.1 Features of external learning and development activities with highest priority:
- Activities that contribute to the achievement of the Area’s strategic goals;
- Activities focusing on the development of knowledge and skills essential to the individuals’ role;
- Activities that reflect a core component of an individual’s professional development plan as identified in their Annual Performance Review.

5.3.2 Guidelines for staff seeking support to attend external learning and development activities:
- Recommended that staff outline a professional development plan as part of Annual Performance Development;
- Ensure that professional development plan articulates with the Area’s strategic goals and specific service objectives;
- Be prepared to participate in/contributed to in-service and continuing education of staff within the relevant Unit or Service.

Refer to Attachment 2 for a Decision Making flowchart aimed at guiding the approval of learning and development leave.

5.4 TYPES OF AND AMOUNT OF LEAVE

5.4.1 Seminars, conferences, and short courses
The approval of leave and/or financial assistance for attendance at seminars, conferences, or short courses will be considered in light of the Area’s strategic plan. Staff may be granted learning and development leave, or may be considered ‘on duty’ depending on the priority for the activity concerned. The amount of leave granted is at the discretion of the appropriate Department Manager and/or Delegated Authority, taking into consideration relevant policies and award entitlements. Decisions in relation
5.4.2 Tertiary study
All staff are encouraged to acquire additional skills and qualifications relevant to their employment.

In recognition of the shortage of specialist nurse skills across the NSW public health system, nurses wishing to attend a part-time postgraduate course of study, who are working shift work, will be given priority in being released from rostered shifts to attend lectures/tutorials where there are no alternative and feasible attendance options (Example: Registered Nurses employed as postgraduate student midwives).

Replacement staff should be provided where appropriate. This applies only to further studies that lead to a recognised clinical qualification within an identified area of skill shortage.

Leave will not to be approved for failed or repeated subjects.

The maximum amount of tertiary study leave that can be approved is 4 hours per week, per semester or term. At the beginning of each semester or term the staff member must negotiate how tertiary study leave is to be taken, in accordance with the following guidelines.

5.4.3 Face-to-face Lectures
The amount of leave granted is at the discretion of the appropriate Department Manager and /or Delegated Authority.

In respect of attendance at an educational institution, staff may be granted 50% of compulsory attendance times, i.e. up to a maximum of 4 hours per week per semester or term.

The amount of leave granted to attend examinations will be based on the specific requirements of the individual course. Department heads may grant pre-examination leave for staff where it is considered appropriate and where there is no direct impact on the provision of services. A staff member’s request not to be rostered to work night shift on the day prior to a scheduled morning examination will, wherever practicable, be agreed to by the department head.

5.4.4 Flexible, Online and Distance Education
With an increasing number of accredited courses being available via flexible delivery modes the equivalent amount of learning and development leave available for face-to-face study may be granted to staff undertaking education programs delivered by alternative methods.
Refer to Attachment 1 for a summary of the benefits and support available for various types of Learning and Development Activities.

5.4.5 Accrual of leave
Learning and development leave associated with tertiary studies may be accrued up to a maximum of 5 days per semester or term and may be accrued until the last examination of the semester, or the last attendance day of the semester if there is no final examination.

5.4.6 Residentials
The amount of leave to attend a compulsory residential program should be based on the specific requirements of the course and should be negotiated at the time of application for learning and development leave.

5.4.7 Thesis/research or combination thesis/research/coursework
Periods of leave may also be granted to staff undertaking higher degrees by thesis, research, coursework, or a combination of these.

The amount of leave will be based on 4 hours per week for each academic year of study. An academic year for these purposes is considered to be a year of full-time study. Where a staff member is undertaking the study on a part-time basis the periods of leave should be granted on a pro rata basis. For example:
- If the higher degree takes 1 academic year and an academic year is 30 weeks, the entitlement for leave would be calculated as 30 weeks x 4 hours = 120 hours available over the year;
- If the higher degree takes 2 academic years, the entitlement would be 240 hours, available over 2 years;
- If the employee completes a 2-year degree on a part-time basis over 4 years, the entitlement would be 240 hours, available over 4 years.

Rather than being taken on a week-to-week basis the leave is available over the course of study in amounts mutually agreeable between the staff member and the employer.

5.5 APPLICATION AND APPROVAL PROCESSES
Application, approval and review processes will be communicated to all staff that apply for Learning and Development leave.

Learning and Development Leave is not required for learning activities undertaken by staff on a routine basis, and at which staff are considered to be “on-duty”. For example:
- “In-house” courses or learning activities; or
- Mandatory training and education.

5.5.1 Applying for Leave
All Staff must complete the appropriate application forms when applying for Learning and Development Leave:
• Learning and Development (Short Course, Seminar and Conferences) Leave Application Form – Area Form F101;
• Learning and Development (Tertiary Study) Leave Application Form - Area Form F102.

Completed leave request forms, together with the necessary supporting documentation, are then forwarded to the appropriate Department Manager.

**Note:** Applications for Tertiary Study must be submitted at the beginning of each semester.

### 5.5.2 Decision Making Process

Department Managers will respond to leave requests within 21 days of receipt of an application for learning and development leave.

In instances where learning and development leave is not approved, Department Managers will ensure:

- The reason for non-approval is clear and stated in writing to the staff member, and;
- The staff member is advised of the availability of a review process.

Where learning and development leave is not approved the review process should be completed within a further 14 days.

Refer to **Attachment 2** for Decision making tool of the approval of Learning and Development Leave.

### 5.6 PAYMENT FOR LEAVE

Leave approved for the purposes of learning and development activities will be paid on the basis of the staff member’s ordinary rate of pay, i.e. in accordance with the relevant award, agreement and/or determination in relation to the payment of ordinary hours, excluding penalty rates.

#### 5.6.1 Workers Compensation

Generally, staff on approved learning and development leave during normal working hours, or in traveling between their place of work and education, will be covered for the purposes of Worker’s Compensation. Given the variety of situations in which staff undertake study, specific information regarding coverage can be obtained through the SESIH Human Resources and/or Risk Management Units.

#### 5.6.2 Financial Assistance

SESIH will meet costs associated with learning and development activities that are required by the Area.

Staff will be responsible for meeting all fees/costs associated with tertiary studies or fees associated with other educational activities, unless learning and development scholarships or other forms of financial assistance are available.
5.7 TRAVEL AND ACCOMMODATION
In instances where approval is sought to attend a conference or seminar, which involves overnight accommodation and or long distance travel, staff must complete the Area’s ‘Travel Pack’ application to apply for financial assistance. The contents of the “Travel Pack” explain the requirements as set down by SESIH, the Department of Health, and the Australian Taxation Office in relation to these issues.

5.8 FEEDBACK MECHANISM FOR INFORMATION ACQUIRED AS A RESULT OF ATTENDING A CONFERENCE, SEMINAR OR SHORT COURSE
Staff who are granted Learning and Development leave to attend an external short course, seminar or conference should complete Area Form XXX - Learning and Development Feedback Report (Short Course, Seminar and Conferences), ideally within two (2) weeks of completion of the activity. The feedback mechanism must include a proposed schedule for the dissemination of information acquired from the Course, Seminar or Conference, to the staff within their Unit /Service/Facility where this is considered appropriate.

5.9 DATA COLLECTION
In complying with NSW Heath Policy, and where resources are available to do so, Department Managers will ensure that data relating to the granting of learning and development leave is entered into the Learning Management System (LMS/Pathlore) and Kronos (using the Kronos codes as they appear on the respective ‘Study Leave’ forms).

5.10 ENQUIRIES
Any enquiries regarding this policy should be directed to Local Human Resource Departments.

6. DOCUMENTATION
- Learning and Development (Short Course, Seminar and Conferences) Leave Application Form – Area Form F101
- Learning and Development (Tertiary Study) Leave Application Form – Area Form F102
- Learning and Development Feedback Report (Short Course, Seminar and Conferences) – Area Form F043

7. REVISION & APPROVAL HISTORY

<table>
<thead>
<tr>
<th>Date</th>
<th>Revision No.</th>
<th>Author and Approval</th>
</tr>
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<tbody>
<tr>
<td>June 2007</td>
<td>0</td>
<td>Jayne Tesch, Learning and Development Consultant. Approved by Leticia Whelan, Manager Organisational Learning, Kim Olesen, Director Nursing and Midwifery and approved by Area Executive Committee 5 June 2007.</td>
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</tbody>
</table>
Attachment 1 - Summary of Learning and Development Activities

GUIDE TO THE BENEFITS AND SUPPORT AVAILABLE FOR LEARNING AND DEVELOPMENT ACTIVITIES

<table>
<thead>
<tr>
<th>LEARNING AND DEVELOPMENT ACTIVITY</th>
<th>BENEFIT</th>
<th>LEAVE AVAILABLE?</th>
<th>FINANCIAL SUPPORT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mandatory Training/ Education</td>
<td>Beneficial to SESIH, to meet legislative, policy, or service delivery needs</td>
<td>Leave not required as employee ‘on duty’.</td>
<td>Provided by employer. Refer: Section 5.3</td>
</tr>
<tr>
<td>‘In-house’ or Employer arranged Seminars and Short courses</td>
<td>Beneficial to employee; Meets identified need for SESIH</td>
<td>Leave not required as employee ‘on duty’.</td>
<td>Provided by employer. Refer: Section 5.3</td>
</tr>
<tr>
<td>External Conference, Seminar or short course</td>
<td>Beneficial to employee; Potential benefit to the SESIH</td>
<td>Leave may be approved or staff member may be considered ‘on duty’.</td>
<td>Negotiable based on Learning and Development Leave policy and budgetary constraints Refer: Section 5.3</td>
</tr>
<tr>
<td>Tertiary education or program offered by a Registered Training Organisation (RTO)</td>
<td>Beneficial to employee; Potential benefit to the SESIH</td>
<td>Leave may be approved.</td>
<td>At Employee’s expense unless directed by Employer to undertake program. Refer: Section 5.3</td>
</tr>
<tr>
<td>Program Seminar or Short course aimed at personal development (not directly related to employment)</td>
<td>Employee benefit only.</td>
<td>No leave available.</td>
<td>Employee’s expense.</td>
</tr>
</tbody>
</table>

Attachment 2 - Decision Making Tool

FLOWCHART FOR GUIDING THE APPROVAL OF LEARNING AND DEVELOPMENT LEAVE.

NB. Staff are required to participate in performance development discussions on an annual basis where development goals and career pathways can be established. Where this discussion has not occurred applicants are not to be disadvantaged in their access to learning and development opportunities.

Q. Is the applicant aware that leave recipients are required to submit feedback report to their Unit or Service Manager following attendance of Conference Seminar or Short Course?

Yes

Discuss applicants responsibilities with regard to the dissemination of information acquired as a result of participation in external learning and development activities (where this is deemed appropriate) and negotiate measures where they participate actively in the continuing education of colleagues and Unit/ Service staff.

No

Is the program/course relevant to professional development plan/ Service plan/ Service needs /Career pathway?

Yes

Offer Annual Leave/ADO; Offer career counseling; investigate alternative programs/courses for professional development.

No

Have the entitled number of learning and development leave days for this staff member been exceeded in this financial year?

Yes

Offer Annual Leave, roster change, rostered day off or ADO.

No

Is there financial support available within the budget to cover backfill (if necessary) or professional development funding available (either within the organisation or externally) to cover course fees if required?

Yes

Offer Annual leave, roster change, rostered day off, ADO, time in lieu (negotiable).

No

Will staffing requirements be compromised if leave is granted?

Yes

Recommend shift change/ roster change.

No

Approve Leave.

Acknowledgement: Adapted from SESIH Mental Health Program, Workforce Strategy Plan, 2006-2011 - page 30..