



Triumph Learning Trust

Aspiration - Collaboration - Innovation

Training and Education Scheme Policy

Policy Details

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1. Introduction

This policy provides guidelines to ensure a consistent approach is adhered to when responding to requests for support with qualifications training/courses for all staff working within Triumph Learning Trust. The Training and Education Scheme covers learning and development that is provided by external bodies and generally leads to qualifications which are recognised by the Trust as being relevant and helpful to the performance and development of its employees.

Any financial assistance is initially provided as a loan and may be subject to repayment in certain circumstances. Employees receiving financial assistance have obligations to the Trust as outlined below. There is no guarantee that any request for support with training/courses will be accepted, and this should not be assumed.

2. Scope of Policy

This policy covers all qualifications training/courses that are not provided directly by the Trust or Local Authority. The scheme covers expenses, study and examination leave, monitoring of progress, retention agreement and repayment of costs incurred. Personal membership fees or subscriptions are excluded from this policy as they are the responsibility of the employee and as such will not be funded by the Trust.

3. Background

The Training and Education Scheme is designed to provide a process by which employees can request financial and other assistance to study for qualifications which are recognised by the Trust/Trust as helping to equip them for existing and future job responsibilities.

4. Process

Employees can request time off to attend training/courses and/or examinations, to claim for travel and/or accommodation expenses and for financial support from the Trust/Trust to undertake training/courses. Any request for support to attend training/courses will be made using the Application Form and Scheme Contract in Appendix 1. Employees should make it clear what the training/course is, how long it will last, the dates of the training/course and details about the training/course. Employees should also submit a business case, outlining why they want to undertake the training/course and the benefits that it will bring to the Trust. This form should be submitted to the Headteacher/Line Manager.

Upon consideration of the request the Headteacher/Line Manager will confirm their decision in writing on the Application Form and Scheme Contract. If the decision is in support of the request a business case will outline the benefits of agreeing to the request. If the decision is to reject the request the Headteacher will set out the reasons for this in writing on the Application Form and Scheme Contract.

Employees have the right to appeal against any decision made. To do so they should set out their grounds of appeal in writing to the CEO, within 5 working days of receipt of the decision

from the Headteacher/Line Manager. The CEO will then review all paperwork and make a final decision, which will be in writing to the employee.

If approved the Trust/Trust will send a copy of the Application Form and Scheme Contract to our payroll lead, so that in the event of the employee leaving the organisation the relevant funds can be re-claimed.

Once agreements are in place the employee should forward any receipts/invoices to the Headteacher/Line Manager, and these should be paid in accordance with financial procedures. On completion of the course, the employee must provide the certificate of completion to their headteacher / Line Manager.

5. Terms

The following terms apply to any employee whose request is accepted.

1) Progress

In return for assistance given employees are expected to study conscientiously. Employee's progress will be regularly reviewed with the aid of attendance records, reports and results. This may affect further assistance where attendance or results are poor.

2) Absence

Any absence from attendance at a course/training must be approved in the same way as absence from work. Absence due to sickness must be reported to Trust as well as the training/course provider.

3) Repayment

Any financial assistance is granted on the condition that the employee undertakes to remain in the employment of the Trust/Triumph Learning Trust until two years from the date on which studies cease (normally considered to be the date of the last exam or date that last piece of coursework is submitted). The employee acknowledges this when making their request for support and signing the Application Form and Scheme Contract. All financial assistance will be logged on the scheme contract.

If an employee, without good reason, fails to sit an exam or submit coursework, fails to show satisfactory progress or withdraws from the training/course the Trust/Trust will reclaim full payment of financial assistance.

When an employee leaves the employment of the Trust before completing the qualification, or before the termination of the agreed two-year period, the Trust/Trust will reclaim repayment of the financial assistance.

- Leaving during training or within 0-12 months of completion – 100% repayment
- Leaving between 13-18 Months of completion – 50% repayment
- Leaving between 19-24 months of completion – 25% repayment

- Leaving after 24 months of completion – No repayment

Where the employee leaves due to redundancy or ill health this money will not be reclaimed.

Repayment of financial assistance is calculated on the basis that one twenty fourth of the total amount of assistance will be reclaimed for each outstanding month of the agreed two-year period.

Repayment will be taken from an employee's final salary. If insufficient salary is paid to recoup the repayment, arrangements will be made with the payroll provider to repay the outstanding amount over a mutually agreeable period of time.

6. Financial and Other Assistance Allowed

Employees should not commit themselves to expenditure without approval from the Headteacher/Line Manager. They should produce receipts/invoices for all expenditure.

- 1) Tuition fees, registration and examination fees (for the first attempt at each examination) will be paid. The following expenses may not be claimed for:
 - Professional society admission
 - Subscription fees
 - Re-sit fees for failed exams
- 2) If funding for textbooks is required, then this needs to be approved upfront as part of the original funding request.
- 3) Assistance will not normally be given for equipment and materials
- 4) Where the time to undertake the qualification exceeds 5 days per year, the Headteacher/Line Manager will use their discretion to accommodate the required dates.
- 5) Where approval is received to attend details will be sent to employees before the course commences. Where problems arise regarding confirmation or attendance the employee should refer these to the Headteacher/Line Manager.

7. Support and Advice for Employees

Employees are encouraged to discuss any development needs with their line manager, either as part of normal day to day discussion or as part of the annual professional growth process.

8. Appendices

Appendix 1	Application for Support and Scheme Contract
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Appendix 1 – Application for Support and Scheme Contract

Section 1 – to be completed by employee

First name(s):	
Surname:	
Course Title:	
Qualification:	
Duration of course:	
Course Dates:	
Method and pattern of study: (e.g. classroom, online, days of sessions)	
Course provider	
Website link to course	

Employee's supporting business case (Outline why you want to undertake this training/course and the benefits it will bring to the Trust):

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I am requesting:

		Amount requested
Time off to attend and study time	<input type="checkbox"/>	
Travel and/or accommodation expenses	<input type="checkbox"/>	£
Fees to be paid for by the Trust	<input type="checkbox"/>	£

I confirm that:

- I have read and understand the terms and conditions of the Training and Education Scheme.
- I understand that I am expected to remain employed by Triumph Learning Trust until two years from the date on which studies cease.

- In the event of me withdrawing from any training/course, failing to make satisfactory progress or failing to honour the agreement to remain employed with Triumph Learning Trust for the two-year period, I undertake to repay the Trust the financial assistance in accordance with the scheme's terms and conditions.
- I agree that if any monies are due from me when I leave Triumph Learning Trust that these will be deducted from my final salary. Should there still be an outstanding amount payable by me I shall reimburse the Trust within a reasonable period of time to be mutually agreed with the Trust's payroll provider.
- I understand that if any monies are due from me whilst still employed by Triumph Learning Trust these will be deducted through my salary over a reasonable period of time to be agreed between the Headteacher and myself.

Signature of employee:	
Date:	

Section 2 – To be completed by Headteacher/Line Manager

Headteacher's decision. If approving, outline the supporting business case. If rejecting, outline reasons for rejection:

Signature of Headteacher:	
Print name:	
Date:	