

RIBBLE VALLEY BOROUGH COUNCIL REPORT TO PERSONNEL COMMITTEE

Agenda Item No. 7

meeting date: WEDNESDAY, 12 SEPTEMBER 2018
title: QUALIFICATION TRAINING – REIMBURSEMENT OF FEES
submitted by: JANE PEARSON – DIRECTOR OF RESOURCES
principal author: MICHELLE SMITH – HEAD OF HR

1 PURPOSE

1.1 To agree the Council's policy on reimbursement of fees when someone leaves the authority or fails to complete their studies.

1.2 Relevance to the Council's ambitions and priorities:

- Community Objectives – The Council's support for staff qualification training demonstrates our commitment to providing equality of opportunity. As one of the main employers in the area, the training of staff who work and live in the district reinforces the Council's commitment to education and lifelong learning.
- Corporate Priorities – In accordance with the Corporate Plan, support for qualification training shows the investment in staff to enable provision of efficient services and supports our drive towards being a 'well managed Council'. Qualification training will improve knowledge and skills, enabling officers to perform to the best of their ability.
- Other Considerations – None.

2 BACKGROUND

2.1 The Council's Training Policy allows for staff to apply to undertake qualification training relevant to their post. A copy of the Policy is attached at Appendix 1.

2.2 Appendix B of the Training Policy outlines the terms of course funding and outlines what fees must be repaid to the Council if someone leaves the authority within 12 months or 2 years of obtaining the qualification.

3 ISSUES

3.1 At the last Committee meeting you discussed the Council's policy on repayment of fees and wishes to review the Policy in order to ensure protection for the Council's financial investment in training.

3.2 Currently staff are required to repay 75% of course fees (which includes any exam fees) if they leave the Council's employment within 12 months of obtaining a qualification and 50% of course fees (which includes any exam fees) if they leave within 2 years.

3.3 Members may wish to amend the repayment rate to 100% in the first year and 75% in the second year to ensure the Council receives a proper return on its investment.

4 RISK ASSESSMENT

4.1 The approval of this report may have the following implications:

- Resources – Training is funded from existing departmental or central corporate training budgets, and it is important that potential loss of any financial investment is minimised so that monies are not wasted.
- Technical, Environmental and Legal – Staff are required to sign a Training Agreement in line with the terms of the Training Policy and which represents a contractual document.
- Political – No implications identified.
- Reputation – No implications identified.
- Equality & Diversity – No implications identified.

5 **RECOMMENDED THAT COMMITTEE**

5.1 Consider whether to amend the Policy as outlined in paragraph 3.3.

MICHELLE SMITH
HEAD OF HR

JANE PEARSON
DIRECTOR OF RESOURCES

BACKGROUND PAPERS

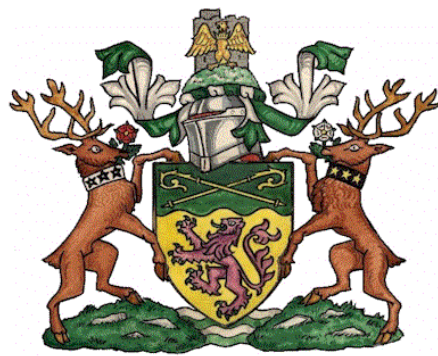
Appendix 1 – Training Policy

For further information please ask for Michelle Smith, extension 4402.

REF: MS/CMS/PERSONNEL/120918

RIBBLE VALLEY BOROUGH COUNCIL

TRAINING POLICY



TRAINING POLICY

1. INTRODUCTION

- 1.1 The borough council's mission statement includes a commitment to work as efficiently and effectively as possible. To enable us to do that, we need to develop all our staff and maximise our investment in the people who work for us.
- 1.2 This document sets out our training policy in the context of our operational needs.

2. POLICY STATEMENT

- 2.1 The council intend to maintain consistency in its training policy with everyone able to further develop their potential where mutually appropriate.
- 2.2 The council wish to demonstrate to others that it not only supports staff development but is anxious to encourage it. It also wishes to ensure a level of consistency throughout the authority towards training.
- 2.3 The council recognise that the attainment of skills and qualifications better enables staff to carry out their duties and equips them for further opportunities both within the authority and outside. We believe that a progressive and constructive staff training policy is a benefit to employees and helps to sustain and enhance their commitment to the authority.

3. RESPONSIBILITY

- 3.1 The Chief Executive is responsible for the overall operation of the authority and its staff. Individual chief officers and directors liaise with him in relation to corporate and departmental training policies. The Personnel Section provides training courses for the authority as a whole and helps and encourages departments in providing in-house and external training courses. However, it remains the line manager's responsibility to assess and formulate proposals for meeting personal and organisational departmental training needs and to agree personal development plans with all employees in relation to forward job planning and the council's performance appraisal scheme.
- 3.2 Ongoing reviews by line managers ensure that a constructive linkage takes place between study and needs of the workplace.
- 3.3 Once departments have agreed training needs and course requirements with staff, managers pass details to the personnel section for inclusion in departmental and corporate training plans and for any additional advice, programme development and approval which may be necessary.

4. CATEGORIES OF TRAINING

- (a) Work Related Training and Development (including seminars, workshops and conferences)

The authority will seek to support as many training and development events as possible, taking account of overall spending plans, operational needs, and the Council's overall objectives and priorities.

CMT will consider training where it is perceived that such an opportunity would be mutually beneficial to the authority and to its employees. A Training Request Form must be completed and submitted to the Personnel Section prior to attendance on any training programme. Confirmation of approval will be issued by the Personnel Section. These programmes will be fully funded by the council and provision will be made for travelling costs etc and any necessary overnight arrangements. (See Appendix A attached.) Full details of travel and subsistence costs must be declared on the Training Request Form and prior to attendance on any training programme.

(b) Qualification Training

An employee wishing to apply for a course of study that leads to an approved qualification, such as an NVQ, HNC, Degree, Masters or a professional qualification such as AAT, CIPFA, CIPD, WAMITAB, must complete a Training Request Form detailing all elements of financial support required from the Council. The request must be supported by the appropriate Director before being passed to the Personnel Section. CMT will consider requests on an individual basis and approval will be subject to organisational priorities and appropriate funding being available.

Where a course will take longer than one year to complete, a Training Request Form must be submitted each academic year to ensure the correct amount of funding is budgeted and allocated.

Our policy in assisting and encouraging such courses is set out in Appendix B attached.

5. PROFESSIONAL MEMBERSHIP FEES

- 5.1 The council may pay full professional membership fees where they are directly related to the employees' job function subject to the approval of the employee's chief officer and to not more than one professional membership fee being paid per employee.*

*Costs met by each department does not come out of corporate training budget.

6. GUIDELINES FOR EXPENSE CLAIMS – CLAIM FORMS ATTACHED AS APPENDIX C

- 6.1 All training must be requested on yellow training request form (Appendix D) and must show all course fees, travel and subsistence costs. The request must be signed by your Head of Service prior submission to Personnel.
- 6.2 A memo will be issued by Personnel approving attendance and any travel/subsistence costs. No training event should be attended prior to receipt of a memo approving such attendance.
- 6.3 All claims for public transport and subsistence resulting from attendance of meetings, site visits and work related business should be made using form TRA/1.
- 6.4 All training related travel, except for lease car holders, and subsistence expenses must be claimed using form TRA/2, lease car holders must use TRA/3.

6.5 All mileage claims for meetings, site visits and work related business must be made using form TRA/3.

Signatures:

..... Chief Executive
..... Head of HR
..... Unison Branch Secretary

APPENDIX A

WORK RELATED TRAINING (including seminars, workshops and conferences)

TRAVELLING EXPENSES: (See flowchart on reverse for further clarification) – Claim using TRA/2 – except for lease car holders – use TRA/3.

- 1 Travelling expenses in all cases must be calculated from the officer's home or normal place of work, whichever is the shortest;
- 2 The car lease mileage rate is applicable to officers participating in the authority's car lease scheme;
- 3 Except as provided in Section 2.13 and 3.16 of the green book:
 - expenses will be reimbursed as authorised at either the cost of public transport,* or by car at training mileage rate (details available from Finance or Personnel);
 - however, where travel exceeds a 30 mile radius expenses must only be claimed at either the cost of public transport* or a maximum of 60 miles (full trip) at training mileage rate.
- 4 When more than one officer is attending a training course/seminar, travel, unless impractical, should be arranged jointly and expenses will be reimbursed to the officer driving the vehicle as follows:

Lone journey	-	as above
Driver + one officer	-	1½ x public transport rate
Driver + two officers	-	1¾ x public transport rate
Driver + three or more officers	-	2 x public transport rate
- 5 Those officers who have to pay for their car parking ie at train stations will be reimbursed against appropriate receipts providing the amount claimed is reasonable.
- 6 Taxis may only be used when the timing of public transport is such that it is essential that you use a taxi to get to your destination for the commencement of the course/seminar and should be agreed with your manager prior to your journey. A receipt must be produced and submitted with a claim.

*Where return fares are available on public transport - that is the rate to be claimed and paid.

SUBSISTENCE EXPENSES – Claim using TRA/2

(A receipt must be produced and submitted with a claim)

Expenses will be reimbursed to officers who attend training courses/seminars and who are prevented from taking a meal where they normally do so and thereby incur additional expenditure.

Additional expenditure only may be claimed, ie expenses incurred, which are additional to those normally incurred, up to the subsistence allowance figures approved by the Council as appropriate for the course attended.

Where the course is held at a college or another education establishment, the officer should make use of the canteen facilities available. Please note that the authority will reimburse any **authorised** reasonable additional expenditure which falls on the officer as a result of attending training courses/seminars.

If you do not understand any of the above paragraphs please ask your manager or the personnel department about it BEFORE you go. The rules on reimbursement will be strictly but fairly applied and any overpayment is recoverable. Ignorance of the rules is not an excuse for incorrect claims.

APPENDIX B

QUALIFICATION TRAINING - REIMBURSEMENT OF EXPENSES, STUDY LEAVE, FEES ETC

Approval for qualification training is given on the basis of the council's policy decisions in relation to post entry training which provide for the following:

TRAVEL EXPENSES – Claim using TRA/2 – except lease car holders – use TRA/3.

The cost of travel expenses will be reimbursed at the appropriate public transport rate and based on return fare rate where applicable (ie lone driver = 1 x public transport rate; driver + 1 officer = 1½ x public transport rate*; driver + 2 officers = 1¾ x public transport rate*; driver + 3 officers = 2 x public transport rate)* or lease car rate whichever is applicable, from either home or office (whichever is the shorter) to the course centre.

*Where return fares are available, that is the rate to be claimed and paid.

SUBSISTENCE EXPENSES – Claim using TRA/2

A receipt must be produced and submitted with a claim. The Council will notify you at the start of each academic year of the amount which may be claimed, recognising that it is only the additional cost which is reimbursable. Receipts will not, however, be required.

You are normally only eligible to claim one meal in any one day. Those attending evening class which commences at 6.00pm or before and finishes after 8.00pm are eligible to claim a contribution towards their additional costs.

EXPENSE CLAIMS - Claim using TRA/2

Expense claims should be submitted once a term on the appropriate claim form. The completed reimbursement form should be submitted in the first instance, to the personnel department for checking.

FEES

The cost of the course and examination fees will be reimbursed by the Council, see "Terms of Course Funding" below.

The council will pay for up to one re-sit examination in each subject.

BOOKS

Any books or other materials will normally be paid for by the council subject to prior approval to their purchase being obtained from the chief executive. The Lancashire County Library service must however be used initially. This option must be exhausted before any books are purchased. Forms are available from personnel. Those books or materials that are purchased by the authority must be returned to the council at the end of the course so that they can be used by other staff.

STUDY LEAVE

Study leave will be granted to any member of staff involved in an examination based course on the basis of half a day's leave for each examination subjection just prior to the examination.

TERMS OF COURSE FUNDING

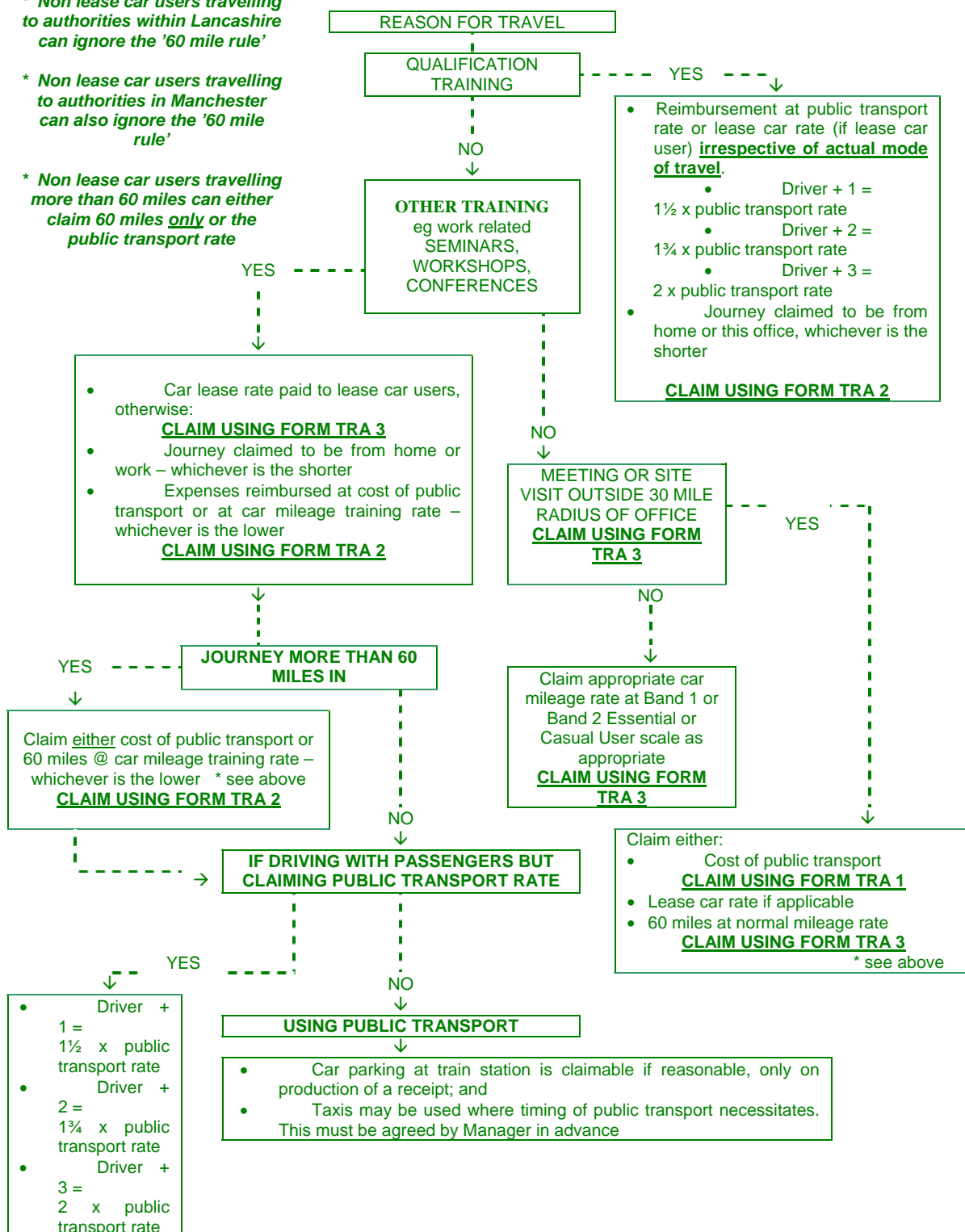
The council's approval is on the basis that should you leave the council's employment within 12 months of obtaining the qualification, 75% of the course fees paid by the council will be repayable to the authority; this will reduce to 50% of the course fees being repayable to the authority should you leave within 2 years. If you terminate your studies prematurely, then the council may require full refund of its contribution towards the course fees depending upon the individual circumstances.

CAR ALLOWANCE RATES - FLOW CHART

* *Non lease car users travelling to authorities within Lancashire can ignore the '60 mile rule'*

* *Non lease car users travelling to authorities in Manchester can also ignore the '60 mile rule'*

* *Non lease car users travelling more than 60 miles can either claim 60 miles only or the public transport rate*



DETAILS OF TRAINING

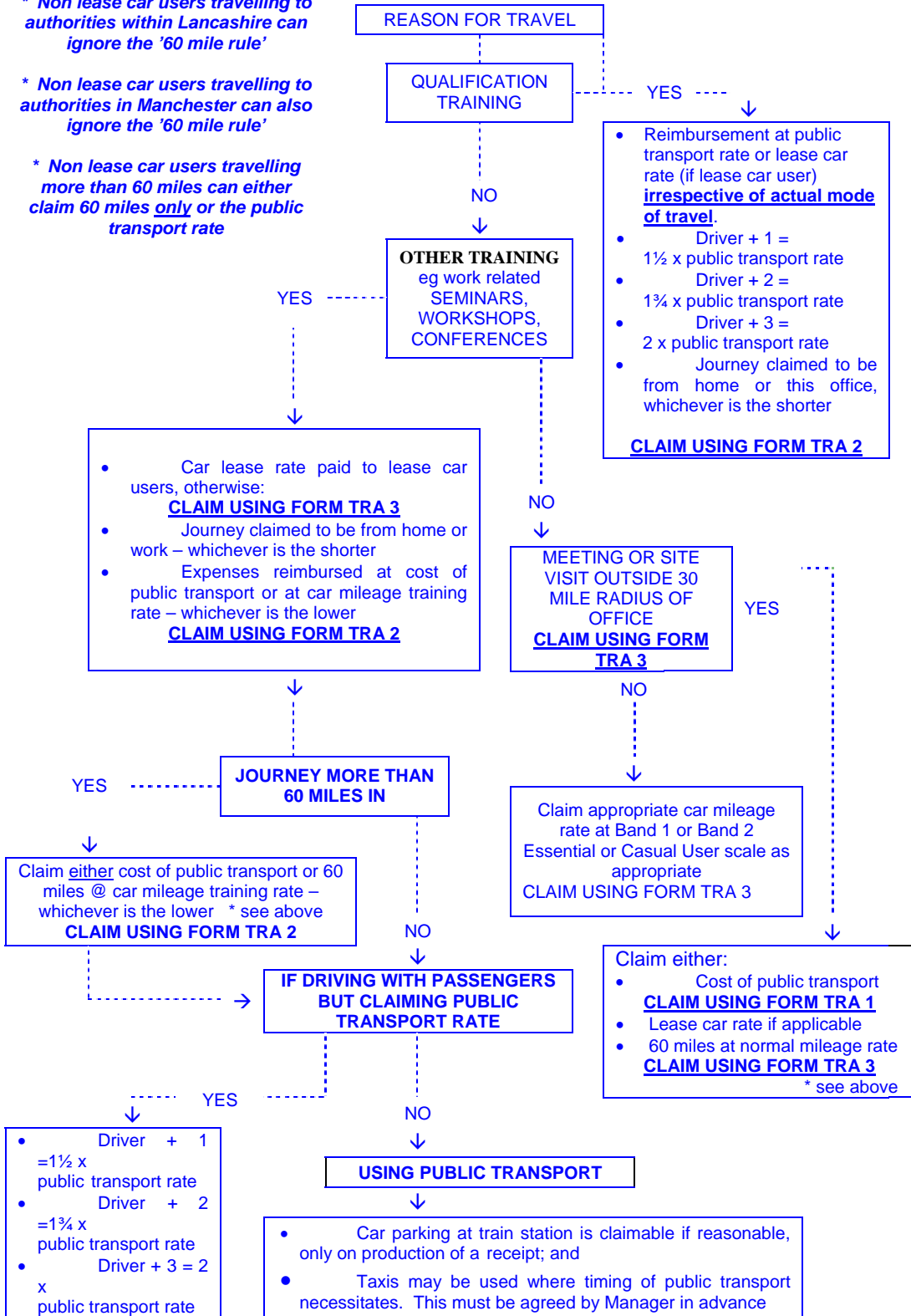
Training Course	Location	No of Miles	No of Trips

CAR ALLOWANCE RATES - FLOW CHART

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LEASE CAR HOLDERS - TRAINING

DATE	BUSINESS	DESTINATION	SPEEDO READING		MILES	
			START	FINISH		
PERSONNEL NOTIFIED					TOTAL	

CAR ALLOWANCE RATES - FLOW CHART

