**Learning Agreement Checklist**

Managers are required to discuss the following with the prospective learner to jointly agree the terms and conditions of the learning agreement before staff commence their learning program:-

|  |  |  |
| --- | --- | --- |
|  | Discussed & Understood  Yes/No/Not Applicable | |
| Outline of agreement made and arrangements made for the reimbursement of subsistence, travel, mileage expenses, lease cars, training costs and any other expenses or allowances |  | |
| Will be in accordance with Agenda for Change, completion of the T1 Form and in line with discussion and agreements of the organisation involving Senior Human Resource Business Partners and Senior Service Line Managers. |  | |
| Prior authorisation should be obtained from the Service Manager before the prospective learner incurs any expenses |  | |
| An EF2 should be completed to reflect changes if appropriate |  | |
| Inform the learner that if applying for a course that requires an up to date enhanced DBS the learner will be liable for any cost involved (an EF2 should be completed and sent to Workforce Services to request a link) |  | |
| Agree with the learner any need for change of base and ensure there is an understanding between managers and learners of the requirements for placements outside of LCHS. |  | |
| Managers and learners will have an understanding for the requirements to attend set days in university or college in accordance with the learning and development programme. Discussion to include substantive contract hours and supernumerary hours. |  | |
| 20% off the job agreed and signed Apprenticeship Commitment Form completed and submitted to the Education Team Apprentice Centre Administrator. (This is mandated by EFSA as the employer is drawing down Government apprenticeship Levy) |  | |
| Discussion with learner regarding agreement to remain with the host organisation upon completion of training for a minimum of 2 years unless the host organisation has agreed otherwise. Manager will maintain contact and apprise employee of any up and coming vacancies. |  | |
| Discussion with learner regarding agreement that in the event of an employee leaving prior to the completion of the course, or prior to 2 years post qualification, they will be required to repay any costs that are outside of any monies provided through levy or HEE funds which will be agreed and settled between the learner and the organisation. |  | |
| Discussed mentor allocation arrangements |  | |
| Annual leave arrangements (eg to be taken as per learning programme to meet registration body study hours requirements however **this must not compromise the service ie safe staffing**) |  | |
| Informing education provider and apprenticeship centre of any sickness that might impact on the completion of the programme study hours. Education team can advise. |  | |
| Salary during learning (managers responsible for salary agreement and payment during apprenticeship – note no backfill funding available for apprenticeships) |  | |
| T1 form completed and arrangements made to discuss sharing of learning and best practice from learning and development post course completion. |  | |
| Summary of Discussion | |
|  | |
| Discussion regarding Aims and Objectives or Learning and Completion Aligned to Organisational Strategic Development Plans – Expectations on Completion | |
|  | |
| Course Final Evaluation: Impact for Learner and Service | |
|  | |
| **I have discussed organisational policy in regard of retention post qualifications – impact of non-completion of this learning and potential for organisation to seek return of funds in line with the Education and Training Policy and Learning Agreement Policy. I agree to inform my line manager and the education provider of any issues impacting on my ability to complete the requirements of the learning programme e.g. sickness, changes in personal circumstances, fitness to practice issues at an early stage.**  *This allows for education providers e.g. universities and apprenticeship providers to offer early support and if necessary, in exceptional circumstances, course deferments.* | |

I agree to the terms and conditions in this learning agreement and understand my requirements to attend all formal university study days and meeting assignment and assessment deadlines.

I have discussed the management support and implications for service.

|  |  |  |
| --- | --- | --- |
|  | Print Name | Signature |
| Learner |  |  |
| Manager |  |  |
| Head of Service |  |  |
| Date |  |  |

**Copies of this form to be retained by staff member and manager and sent to Workforce Services to be added to the staff member’s personal file.**

Email: [workforceservices@lincs-chs.nhs.uk](mailto:workforceservices@lincs-chs.nhs.uk)