



Sheffield Hospitals  
Charitable Trust  
and related charities

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Principles Governing the Funding of

Study Leave for Nursing Staff

by Sheffield Hospitals Charitable Trust

from the J Sinclair White Fund

(Revised 2008)

1. **Introduction**

The Trustees have agreed that the following principles will be adopted in determining the financial contribution towards the costs of Study Leave for Nursing Staff.

2. **Eligibility**

All nursing staff, including health care assistants, support workers and assistant practitioners, working in, or contracted to hospitals or NHS Trusts in Sheffield shall be eligible for consideration.

Applications should relate to assistance with personally incurred course, hotel and travel costs relating to attending organised courses and seminars or fees for approved diploma or degree courses (excluding Top-Up or Masters Level Top-up degrees, for which the “Bursary Award for Nursing Top-up Degrees & Masters Level Top-up” application form should be used). Reimbursement to other Trust Funds or other organisations can no longer be made. Support cannot be given for visits to organisations, non-educational purposes or requests with no perceived direct benefit to the NHS.

Only one application per accounting period will be considered by the Trustees for any one individual. This requirement may be waived where a course is cancelled or an application has been withdrawn, when a further application will be considered, subject to a deduction for any expenditure incurred by Sheffield Hospitals Charitable Trust on the original application. The accounting period currently runs from 1 April to 31 March.

3. **Application Protocol**

All applications for assistance shall be on the currently approved form, (copy attached), duly signed by the applicant and approved by the Matron. Applications not fully authorised or submitted on any other form will be returned. Requests received for courses already completed will be considered subject to the availability of funding.

Completed forms should be forwarded to: Helen Hanrahan, Education Commissioning Manager, Education and Development Department, Rivermead Training Centre, Northern General Hospital, Sheffield S5 7AU who will verify the application and forward to the charity for processing.

#### 4. Method of Costing

All applications should provide an estimate of the total costs, in sterling, of:

- i. Course or diploma / degree course registration fees (all categories)
- ii. Travel costs incurred in attending the course. Please note that any mileage claims will be reimbursed at public transport rate. (Category 1 and 2 applicants only)
- iii. Hotel costs for the duration of the course (Category 2 applicants only)

#### 5. Level of Contribution

The Trustees shall assess the merits of each application based on the information provided. It would aid the decision making process if a copy of the course programme or equivalent is enclosed with the application.

The level of contribution shall be:-

- Category 1 :** Attendee or Delegate at the Event:  
Full reimbursement of the relevant course fee and travel expenses of the attendee to a maximum amount under this category of **£600**.
- Category 2 :** Participating in the event by either presenting an oral paper, displaying a poster, chairing a session or some other special involvement:  
Full reimbursement of the relevant course fee, travel expenses and hotel costs of the participator to a maximum amount under this category of **£1,000**.
- Category 3:** Approved Diploma or Degree Course  
**50%** of the Fee Cost to a maximum of **£1,000**.

To qualify for the enhanced support under category 2, some documentary evidence of qualification should be supplied with the application. This might include, for example, naming of the applicant in the Event Programme or a copy of the Letter of Acceptance for a Presentation. If this is not received prior to the leave period, then approval will be made at the lower delegate rate of Category 1, i.e. reimbursement of course fee and travel expenses only. The formal approval letter for the enhanced rate will be issued upon receipt of the notification.

For Category 3, a copy of the Letter of Acceptance for the diploma or degree course should be attached. For subsequent years of diploma or degree courses a further application should be submitted. Formal approval letters will be issued as appropriate.

In all cases, the confirmation of approval will be notified to the applicant as soon as practicable.

Approval shall be in the form of a letter signed by the Treasurer. The Trustees shall not accept responsibility for any financial commitment made in anticipation of an approval that is not granted. The letter will be sent by internal mail, the Post Office, fax or e-mail. Telephone messages should not be acted upon until confirmed in writing.

No claim form or receipts should be submitted until notification of approval has been received.

## 6. **Payment Method**

Agreed sums shall be paid upon submission of the Sheffield Hospitals Charitable Trust "CLAIM FOR REIMBURSEMENT OF ASSISTANCE TOWARDS NURSING STUDY LEAVE" form. Claims submitted on any other expenses form will not be accepted.

Documentary proof of attendance on the course should also be submitted where possible.

All claims, together with original receipts, should be authorised by the relevant Matron prior to submission. Any claim not so authorised will be returned.

For retrospective applications, no claim form or receipts should be submitted prior to the issue of the formal approval letter.

The total grant payable will be the lower of:-

- i. The estimated costs per the application form.
- ii. The actual costs incurred.

Amounts expended in foreign currency will be converted at the prevailing rate on the day of the expenditure, wherever possible.

Claims for reimbursement should be submitted within three months of the end of the period of study leave, or three months from the date of this approval, whichever is the later. Any claims received after this period will not be processed unless prior agreement has been received from the Treasurer. Where fee payments are more frequent than once per year, e.g. payment for individual modules, claims for reimbursement should be submitted within three months of the date of payment. Each claim must be on the approved claim form.

## Application for Financial Assistance towards Nursing Study Leave

<b>NAME AND GRADE OF APPLICANT:</b>			
Title	Forename	Surname	Grade
<b>CLINICAL SPECIALTY/ WARD AND HOSPITAL or BASE</b>			
<b>ADDRESS FOR CORRESPONDENCE (if different from above)</b>			
<b>Email:</b>		<b>Tel:</b>	
<b>TITLE OF STUDY EVENT / DIPLOMA / DEGREE COURSE</b>			
<b>LOCATION</b>			
<b>OBJECTIVES OF EVENT</b>			
<b>STATUS OF APPLICANT IN RELATION TO EVENT</b>			
1.	Attendee or Delegate at the event	<input type="checkbox"/>	
2.	Participating in the event by either presenting an oral paper, displaying a poster, chairing a session or some other involvement	<input type="checkbox"/>	
3.	Diploma / Degree Course	<input type="checkbox"/>	
<small>(Please tick ONE Box, and include evidence of eligibility for '2' or '3')</small>			
<b>EVENT / TERM DATES</b>			

## Estimated Costs to be incurred personally

<b>Details</b>	<b>Sterling Total</b>	
<b><u>Course Registration Fees (All Categories)</u></b>	<b>£</b>	<b>p</b>
<b><u>Travel Expenses (Categories 1 and 2 only)</u></b>		
<b>Mileage: Estimate of miles to be claimed: @ 24p per mile</b>		
<b><u>Hotel Charges (Category 2 only)</u></b>		
<b>Estimated Total Expenditure:</b>	<b>£</b>	

*I confirm that the above information is to the best of my belief representative of the estimated costs. I confirm that I have read and accept the principles as set out in 'Principles Governing the Funding of Study Leave for Nursing Staff (Revision 2008).'*

Signature of Applicant .....date.....

Signature of Matron.....date.....

**(FOR COMPLETION BY EDUCATION AND DEVELOPMENT DEPARTMENT)**

**VERIFIED BY**

Signature of Education Commissioning Manager.....date.....

**PLEASE REMEMBER:**

- ◆ Do not forward receipts with your application, but include evidence of eligibility for Categories '2' and '3'.
- ◆ Original receipts only should be forwarded with the approved claim form and these will be retained by Sheffield Hospitals Charitable Trust for audit purposes. Copies will only be accepted in exceptional circumstances.
- ◆ Claims for reimbursement should be submitted within three months of the end of the period of study leave (or date of payment for diploma or degree course fees), or three months from the date of the approval notification, whichever is the later. Any claims received after this period will not be processed unless prior agreement has been received from Sheffield Hospitals Charitable Trust.