

## Study Budget

### Principles for Approving Educational Activities

#### Background

Study budget reforms are being introduced to deliver equity of access to educational resources based on individual need and to facilitate improved quality, efficiency, flexibility and transparency. The principles for approving study-budget-funded educational activities have been developed through consultation with trainees, their representative bodies, Colleges, Specialty Advisory Committees and Faculties.

We are moving away from a notional individual annual allocation of study leave funding that varies, to implement a system whereby HEE supports:

- All trainees on approved secondary care sector training programmes to achieve their curriculum outcomes.
- Discretionary or career enhancing activity and courses that add value to the individual and support the wider system.

A proportion of funding will be pooled from the secondary care placement rate to provide support for all trainees irrespective of post type (tariff- or Trust-funded). HEE local offices will capture data on study budget funded activities from February 2018. Heads of Schools and Training Programme Directors will monitor and evaluate the range of funded educational activity undertaken to ensure that it is fit for purpose, providing quality and value for money.

#### Out of Scope Activities

- Funding for statutory and mandatory training is an employer responsibility and will not come from the Study Budget.

#### Approved Activities

- Colleges, Specialty Advisory Committees and Faculties should describe expected capabilities and outcomes but not mandate generic or specific courses. High quality locally delivered activity is preferred where possible.
- Colleges, Specialty Advisory Committees and Faculties should recommend a range of educational activities or courses that could be grouped around specific themes aligned to the curriculum that will help Schools maximise the resource.
- Colleges and local education providers may play a role in delivering courses aligned to the curriculum.
- The 2020 curriculum revision process is an opportunity to review how curriculum outcomes are delivered and what out-of-placement activities should be supported to achieve those outcomes. Master's degrees require consideration.
- It is essential that courses are quality assured.

#### Principles that constitute quality training activity

- Principles should be applied across specialties with the understanding that some specialties will require a greater proportion of the budget than others and that some curriculum stages will require a greater proportion of the budget than others.

- Delivery of curricula objectives based on individual requirements is the primary consideration.
- A good educational activity or course is aligned to the curriculum, receives positive feedback from trainees and faculty and offers value for money.
- Heads of Schools could improve efficiency by delivering local training where possible and release resource to reinvest in aspirational activity.
- Data on current activity should be mapped against curricula to ensure that funds are utilised correctly. This will be essential to delivering quality educational activity that meets trainee and local needs.
- Management and leadership skills development should normally be supported.

### **Approach to historically supported activities**

- Exam preparation courses are often funded as historically supported activity but can vary in quality. Preparatory courses may provide better value than training extensions and therefore should continue to be supported.

### **Supporting Aspirational Activity that is not directly aligned to the curriculum**

- Study budget support for aspirational activities can be considered for trainees who have attained their core curriculum competencies and received an ARCP 1 or are on track to do so if they are in their first year.
- The Educational Supervisor (ES) should be aware of aspirations and performance to assess whether the request is aligned to the trainee PDP.
- Any supported aspirational activities should normally be aligned to service needs.
- For activities that represent aspirational activity, part-funding may be considered – reflecting both HEE and the trainee’s commitment to their enrichment. The TPD or HoS will make this decision.
- HEE funding of postgraduate diplomas and degrees must be rationalised by an established link to the curriculum and a commitment that the qualification will be integral to the doctor’s future career.

### **Foundation Training**

1. Study leave will normally be granted flexibly and tailored to individual needs, in accordance with the requirements of the curriculum.
2. Study leave for Foundation Year 1 doctors (maximum 15 days) will take the form of a regular scheduled teaching/training session as agreed locally; also, FY1 doctors can use up to 5 days of Foundation Programme study leave for tasters to inform future career decision making.
3. Study leave for Foundation Year 2 doctors (maximum 30 days) will include periods of regular scheduled teaching/training sessions delivered locally and for many no additional support will be needed. Study leave may also, with approval from the Foundation Programme Training Director and service manager, include:
  - Undertaking an approved external course aligned to the curriculum: this includes ALS or equivalent (unless already completed in FY1) and occasionally other activity intended to support Foundation Doctors achieve their curriculum outcomes.
  - Periods of sitting an examination aligned to their future career intention.
  - Requests for such leave shall be viewed positively in most circumstances, but with a view to ensuring that the needs of service delivery can be safely met.

## **Communicating the reforms and underpinning principles to trainees**

- HEE should develop communications for dissemination through as many channels as possible with consistent messaging.
- The study budget process should be communicated to trainees at induction.
- Colleges and SACs should support the dissemination of guidance to their specialty trainees.