

# Appendix ONE

## Guidelines for Completion of Formal Academic Study Form

### Introduction

This form has been developed to facilitate a discussion between an individual applying for support in pursuit of Formal Academic Study, their line manager & the Directorate Manager.

Formal Academic Study has been defined as:

**“a part-time third level course of study that runs for a duration of a minimum of one academic year”**

The form will serve to fully explore the objectives of the course of study and to ensure that these are aligned with personal and organisational goals. It is the aim of this process that careful consideration be given, by the Directorate Manager, the Line manager and the individual, to the line of study and development path being embarked upon.

From an individual point of view it is important that the undertaking is:

**Appropriate – i.e. the most suitable course for you at this point in time;**

**In line with your career aspirations (both immediate and long-term) and;**

**Demanding yet manageable (in terms of time commitment etc.)**

In addition, from an organisational perspective, it is important that the undertaking:

**Is in line with organisational objectives and;**

**Will satisfy a need/contribute to a service development.**

It is envisaged therefore, that the applicant, the line manager complete the form **together** and consider honestly, openly and realistically their joint responses to the questions prior to submitting to the Directorate Manager for approval.

Please read the following guidelines carefully as you work through the form.

### Process

When an individual wants to apply for support in pursuit of Formal Academic Study, they should arrange a meeting with their manager.

Prior to this meeting:

The **Applicant** should read and complete the form in draft. This will initiate the necessary preparation for the meeting, e.g. exploration of pre-course study, alternative courses etc.

The **Line Manager** should also prepare for the meeting by reading the form, collecting any background information necessary to provide adequate support and guidance to the individual during the meeting, e.g. pre-course activities available etc.

During the meeting the individual and the line manager should work through the form, discuss any issues, and agree together, responses to the questions. A mutual agreement should be made as to whether or not the application should proceed to the next level. If it is decided from the discussion that the application should not proceed, the line manager and the individual should discuss alternative (more appropriate) development activities.

If the application is to proceed to the next level (**i.e. Directorate Manager**), after the meeting the applicant should complete the form in full based on the discussion. The form should be signed by the applicant and passed to the line manager.

The form should be signed by the line manager (stating that he/she has held a discussion with the individual about the application and that he/she fully supports this application) and subsequently passed on to the next in line manager (**Directorate Manager**) for review and sign off.

Approved Application form will then be sent to the **Learning and Development Unit**, who will consider the terms agreed in the form and communicate further with the Applicant.

## Guidelines for Completion of Formal Academic Study Form

### Role of the Applicant



**It is the responsibility of the Applicant to :**

- ◆ Choose a proposed course of study that is in line with your career development and with the needs of the department/organisation;
- ◆ Investigate courses of study and ensure that the proposed course is the most appropriate one – document the reasons why this is so
- ◆ Arrange a meeting with your manager to discuss the application for support. In advance of this meeting you should fill out the form in draft so that you have considered your responses to some of the questions;
- ◆ Accept and (if necessary) clarify the feedback and advice that your line manager may give you in relation to the application;
- ◆ Be adaptable – perhaps you need to do some preparation/a pre-course in advance of the proposed course? Be open to such ideas;
- ◆ Commit to any course for which it is agreed you will receive support. You should fully understand the commitment required and be prepared to maximise the benefit of this course both for yourself and for the department/organisation. This may involve sharing your learning with others in the team etc.

### Role of the Line Manager



**It is the Line Managers responsibility to :**

- ◆ Ensure a meeting is held between you and the applicant in order to discuss the application;
- ◆ Prepare for this meeting by working through the form, considering what you would like to contribute and anticipating reactions;
- ◆ Offer advice and guidance to the applicant, considering both their best interests and the interests of the department/team;
- ◆ Come to an appropriate and realistic decision as to whether or not the application will be supported. If it is not to be supported, the reasons should be clear and specific. Alternative development actions should be agreed with the individual.

### Role of Directorate Manager



**It is responsibility of the Directorate Manager to :**

- ◆ Ensure a meeting/discussion takes place between you and the Line Manager if necessary to discuss the application
- ◆ If supporting the application the Directorate Manager must sign the application as outlined in **Section 7.8**
- ◆ If not supporting the application the reasons should be clear and specific and alternative development actions should be agreed with the Line Manager/individual
- ◆ Forward completed application to the Learning & Development Department, UHL for official documentation to be issued to Applicant and for processing of related invoices.

# Guidelines for Completion of Formal Academic Study Form

## Role of Learning & Development Department



**It is the responsibility of the Learning & Development Department to :**

- ◆ Ensure that the Application form is completed in full
- ◆ Acknowledge receipt of the Completed Approved Application to the Applicant with CC to Line Manager and Directorate Manager
- ◆ Provide the Applicant with a Letter for the Third Level Institute confirming payment of fees if appropriate
- ◆ Arrange the payment of invoice from Third Level Institute as agreed
- ◆ Liaise as necessary with Third Level Institute
- ◆ Keep a record of the Application and any invoices paid
- ◆ Accrue as necessary associated costs per Directorate on a monthly basis

# Guidelines for Completion of Formal Academic Study Form

## The Form

The following is an aid to clarify certain aspects of the Learning Contract and to provide guidance on points for discussion while working through the form.

### **SECTION ONE**

#### **1.1 to 1.9**

This section requests background information on the applicant.

### **SECTION TWO**

#### **2.1—2.2 Current Job information**

#### **2.3 – Consider the key objectives of the current role**

The Applicant's current role should be discussed. Job objectives at that point in time and in the immediate future should be agreed and documented. Although it may be useful to refer to the job description for the position, job objectives recorded here may differ from those in an initial job description and should aim to reflect the current situation.

#### **2.4 – What are your Career Aspirations**

In this section, the applicant's career aspirations, whatever they may be, should be discussed. This discussion should focus on both short-term and long-term goals and where the individual sees themselves going over the following twelve months and over the following three to five years.

### **SECTION THREE**

#### **3.1 – Previous Qualifications**

Previous qualifications should be explored. Particular attention should be given to qualifications obtained whilst in the Health Services. Qualifications – e.g.

Diploma, Degree, Masters  
Subject – e.g. English etc. Confer-  
ring Body – e.g., Trinity, UL

### **SECTION FOUR**

#### **4.1 – Course Title**

Attach course outline with applica-  
tion

#### **4.2 – Qualification Obtainable**

EG : Certificate, Diploma, Degree

#### **4.3 – Conferring Institution**

Name of Third Level Institute  
awarding the qualification

#### **4.4 - Course Duration**

Over how many academic years is  
the course run?

#### **4.5—Number of weeks / months per year**

In any one academic year, for how  
many weeks or months does the  
course run? If the duration of the  
course varies across the years, speci-  
fy here, the number of weeks or  
months it will run for in year one.

#### **4.6—Course Start Date—If known**

#### **4.7 – Main Objectives of the Course**

At this point the objectives of the  
course should be explored. The ap-  
plicant should come to the meeting  
furnished with this information, hav-  
ing carried out the necessary prepa-  
ration to demonstrate their genuine  
interest in and commitment to the  
course of study.

#### **4.8—Course Modules** List out the course modules to be undertaken.

#### **4.9 – Course Fees** Details of the Course fee per year .

**NB : In all cases if the course of  
study is more than one year an Ap-  
plication must be submitted for  
funding for each year of the pro-  
gramme.**

#### **4.10 – Attendance Time Commit- ment**

The time that the course is going to  
take (on a weekly basis) should be  
considered at this point.  
Discussions should be held around

how realistic and manageable it  
might be for the individual to com-  
mit to such time commitments.  
Day of the Week – is the course  
every Wednesday and Friday, every  
weekend?

From (Time) – at what time does the  
course start? (e.g., 3 p.m., 6 p.m.)  
Until (Time) – at what time does the  
course end? (e.g., 6 p.m., 9 p.m.)

#### **4.11– Time Off to Attend Classes/ Seminars**

If the time commitments (outlined  
in the previous section) will require  
time off from work, a discussion  
should be held around:

How much time will be required off;  
How this will be managed – will  
the individual be rostered in  
such a way that will accommo-  
date the study or will they simply  
given the time off?

#### **4.12 – What alternative courses of study have been considered? Why has the decision been taken to pro- ceed with this course – why is it considered the most appropriate option?**

In this section, alternative courses of  
study should be discussed. It is not  
to say that an alternative course  
should be taken, rather the aim is  
that any eventual course of study be  
the most appropriate and effective  
for all concerned. It is strongly  
recommended that alternative  
courses be investigated by the  
applicant prior to the meeting. Infor-  
mation relating to such alternatives  
should be brought to the meeting.  
The manager should also be in a  
position to offer advice and support  
in relation to alternative courses.

A discussion should be then held as  
to why this course has been chosen  
as opposed to the alternatives.  
These reasons should be document-  
ed in this section also.

PTO for Section 5 & 6

# Guidelines for Completion of Formal Academic Study Form

## The Form

### **SECTION FIVE : Learning Contract**

#### **5.1 – How does the course integrate with current role objectives and career aspirations?**

Having discussed the objectives and the appropriateness of the course, at this stage time should be given to considering how this course relates to the individuals job objectives and in what way it is aligned to their career aspirations. Consider:

In what way the course will

facilitate the achievement of current and future job objectives;

In what way the course will

facilitate the achievement of career aspirations.

#### **5.2 What do you expect to gain personally from this course**

What is your personal goal ?

#### **5.3 Do you have a P.D.P.**

Do you have a personal Development plan in place and if so how does this course fit into this plan

#### **5.4 – What contribution will this course make specifically to the immediate work area/Department?**

#### **5.5. Applying the Learning to the Service plan/organisational goal/departmental goal**

### **SECTION SIX**

#### **LINE MANAGER APPROVAL**

#### **6.1 – 6.3 : If the application is not being supported, please state the reasons and alternative actions to be taken**

If, following the discussion, the decision has been taken not to support and recommend the application, the reasons underlying this decision and

any alternative actions should be stated here. It is recommended that alternative development actions should be considered.

### **SECTION SEVEN**

This section outlines the agreed terms of support and is completed by the Line Manager in discussion with the Applicant.

#### **7.1 – Method of Fees Payment**

This section must be fully completed to identify costs and leave agreed in advance

If the Application has been approved the Learning & Development Department will issue a letter to the Applicant confirming payment of fees and this letter should be submitted by the Applicant when registering for the programme. .

#### **7.2 – Agreed Study Leave**

The study leave to be allocated in **year one** only should be estimated here. The likely month(s) in which this might be taken should also be outlined.

#### **7.3 – Agreed Exam Leave**

Exam Leave should be allocated where possible but only as it falls on rostered days at work.

#### **7.4 Agreed time off**

Please complete here the number of days allocated to attend the course, whether weekly or monthly and tick box as appropriate.

#### **7.5 Agreed Action Plan ( Line Manager & Applicant )**

Agree to meet as considered appropriate to discuss progress, explore how the learning can be further shared and discuss any support required.

#### **7.6 Applicants Declaration**

This Section must be fully completed signed and dated by the Applicant as indicated.

#### **7.7 Line Manager Declaration**

This section must be completed by the Line Manager, signed and dated as indicated.

#### **7.8 Directorate Manager/ Designated Officer Approval**

This section must be completed by the Directorate Manager/Designated Officer and must be signed and dated as indicated.

If the Application is not being supported at this stage, the Directorate Manager/Designated Officer should identify the reasons why and should return to the Line Manager for discussion. The Line Manager should then advise the Applicant as appropriate.

#### **7.9 Learning & Development Manager/Designated Officer**

If approved the completed application form should be forwarded to :

**Ann Marie Kennedy,  
Learning & Development Manager,  
1st Floor Nurses Home,  
University Hospital Limerick.**

A letter will follow to the Applicant with any necessary backup. CC to Line Manager & Directorate Manager

### **ON COMPLETION OF PROGRAMME**

Evidence of Successful completion should be forwarded to the Learning & Development Department following completion of the programme for record purposes.