



NAME OF POLICY: Qualification Funding Policy

1. INTRODUCTION

This policy details the criteria and process for any member of staff wishing to apply for funding towards a qualification up to and including master's level or professional course costing over £1,000. It also contains the application form which should be completed, authorised and forwarded to Learning & People Development (L&PD).

1.1 Purpose

- The purpose of this document is to ensure St Mary's University (SMU) has a skilled, knowledgeable and engaged workforce now and for the future.
- Effective staff development strategies will support the university to reach its strategic goals, enhance its reputation and instil a culture of continuous learning.

1.2 Scope

- This policy is applicable to all staff ensuring inclusivity as set out in SMU's commitment Equality, Diversity and Inclusion.
- It applies to all staff regardless of whether they are full-time, part-time or on a fixed-term contract.
- It does not apply to agency workers, casuals, Hourly Paid Academics (HPAs), or self-employed contractors.
- It does not apply to doctorate courses.

2. POLICY PRINCIPLES

- 2.1 This policy ensures fair and equal access to funding opportunities for individuals from diverse backgrounds
- 2.2 Funding decisions will be based on the applicant's ability to meet the eligibility criteria, successful passing of probation period, the benefit the qualification brings to the applicant's current role, whether a need was identified during the previous year's appraisal, and whether it contributes to the achievement of Vision 2030.

- 2.3 The qualification should represent value for money, with clear benefit to the staff member, team and SMU.
- 2.4 Providers of the qualification should demonstrate high standards of quality and excellence.

3. ROLES AND RESPONSIBILITIES

- 3.1 The Head of L&PD has strategic oversight of this policy and queries should be referred to learninganddevelopment@stmarys.ac.uk.
- 3.2 L&PD will:
- ensure there is a fair process for approving applications
 - ensure payment is made to the relevant provider of the qualification.
- 3.3 All applications for funding should be authorised by line managers, plus Head of School or Dean or Director.
- 3.4 The line manager will be responsible for:
- checking the application form has been fully completed (including all financial commitments)
 - confirming that at least two providers of the qualification have been considered
 - confirming that the individual has successfully passed their probation at the time of application submission
 - confirming the value added and impact of the training on the individual and the University before making decisions on training and development interventions
 - (where the qualification will be delivered by St Mary's University) confirming that the relevant Dean has approved the individual onto the programme
 - confirming their understanding of the commitment of time needed by the applicant to successfully complete the qualification.

4. CRITERIA

In order for applications to be considered for qualification funding, staff members should meet the following criteria:

- 4.1 They should be on a permanent or fixed term contract (FTC). The FTC should cover the length of the qualification and the two-year repayment period.
- 4.2 They have successfully passed their probation at the time of application submission and performance is satisfactory.

- 4.3 They should not be under any formal University procedures.
- 4.4 They should not have been accepted for any qualification funding within the previous 12 months.
- 4.5 They should have considered at least 2 different options for the qualification they wish to pursue before requesting funding.
- 4.6 The course of study should be part time.
- 4.7 The course of study should commence after the closing date for qualification funding. No retrospective funding claims can be made and no payment can be made for any qualification that has commenced prior to the closing of the qualification funding window.
- 4.8 The qualification is essential to your role and/or is essential to delivering the University's strategic objectives.
- 4.9 The qualification supports the staff members' career development and has been identified in the most recent appraisal.
- 4.10 Consideration will be made as to the number of applications for funding received from the Faculty/Department to ensure equity of access to qualification funding across the University.

5. TERMS AND CONDITIONS (T&C)

The following T&Cs apply to all staff who receive funding for qualifications:

- 5.1 The funding received will be in the form of a loan which is to be repaid to St Mary's in the event of the staff member leaving within a two-year period following the completion of the course. For clarity, completion of the course is the date at which the award is made to the staff member, not the date of the last exam or assignment. Repayments will be calculated on a pro-rata basis as follows:
 - 100% if a staff member leaves within 6 months of completion
 - 75% if a staff member leaves within 12 months of completion
 - 50% if a staff member leaves within 18 months of completion
 - 25% if a staff member leaves during the remaining 6 months
- 5.2 Any outstanding repayment will be deducted from the staff member's final salary. If the final salary is insufficient, payment will be expected from the staff member in the form of a bank transfer.
- 5.3 Outstanding repayments not recovered from a final salary can be repaid through one lumpsum, or split over a maximum term of three months.

- 5.4 In the case of redundancy, retirement or dismissal, any repayment amounts will be at the discretion of the Human Resource Director (HRD).
- 5.5 For external qualifications, a maximum of 75% of the qualification cost will be funded by St Mary's. The remaining 25% can be made by the staff member in full to the provider, or by 12 monthly instalments from their salary through payroll, commencing month following payment to qualification provider by SMU.
- 5.6 For internal qualifications, funding received will be in the form of a fee waiver.
- 5.7 St Mary's will arrange to pay the course provider directly for its percentage of the cost of the qualification.
- 5.8 Where a staff member fails a year and must repeat, they will pay their own fees for the repeat year. If the staff member is unsuccessful in the repeat year, any further funding for subsequent years of funding requests will be at the discretion of the HRD.
- 5.9 The staff member is responsible for making their own course booking directly with the provider once they have confirmation of funding.
- 5.10 A member of staff will not be funded or given time off to attend a qualification activity during their notice period.
- 5.11 Any costs for study material, travel, meals, equipment will not be funded by the L&PD department and should be discussed and agreed with the line manager before submitting an application (depending on the department budget).
- 5.12 Any agreement to time off for training, study or exams should be agreed with the line manager before submitting an application.
- 5.13 Staff are encouraged to use 'early-bird' booking offers and group booking discounts wherever possible.
- 5.14 All certificates for completed qualifications should be forwarded to L&PD within one month of receipt of certificate.
- 5.15 Funding is paid towards the cost of all registration, tuition and exam fees.
- 5.16 All applications will be assessed against the criteria above. In the event of there being insufficient funds for all applications, the relevance of the qualification and the need will be prioritised.
- 5.17 L&PD will pay for professional membership of fees for any staff member who is currently being sponsored for a qualification. Once this sponsorship has ceased, the individual or the relevant business unit will be responsible for paying these fees accordingly.

6. PROCESS FOR QUALIFICATION APPLICATIONS

To receive funding for qualifications, staff must adhere to the following process:

- 6.1 Fully complete the [Qualification Funding Request Form](#) (see Appendix A).
Please note:
- You must obtain two levels of authorisation: one from your line manager and one from your Dean/Director. Applications without both required authorisations will not be accepted.
 - You must complete this form using DocuSign. It is your responsibility to ensure both levels of authorisation are completed before the application window closes. You can track this in your DocuSign account.
 - Applications submitted outside the qualification funding window will not be accepted.
- 6.2 Qualification funding windows open:
- In June for a September commencement of study
 - In October for a January commencement of study
- 6.3 Read the Criteria (section 4) and T&Cs (section 5) and confirm that you meet all requirements.
- 6.4 Consider at least two providers for the qualification (unless provided by SMU).

7. RELATED POLICIES AND PROCEDURES

- 7.1 Please see Appendix A for the application form.

8. REVIEW, APPROVAL AND PUBLICATION

- 8.1 This policy will be reviewed once every three years.
- 8.2 This policy will be reviewed by the L&PD team and HRD.
- 8.3 This policy will be located in the L&PD pages of the website.

10. DOCUMENT CONTROL INFORMATION

The table below should be completed by the document owner.

Document Name	Qualification Funding Policy
Executive Owner	Felicity Morath, Head of Learning & People Development, HR
Version Number	1
Approval Date	Day/month/year
Approved By	Ruth Thompson
Date of Commencement	Day/month/year

Date of Last Review	Day/month/year
Date for Next Review	Day/month/year
Related University Policy Documents	List all applicable
<i>For Office Use – Keywords for search function</i>	

APPENDIX A

Qualification Funding Request Form

Please complete this form to apply for funding for a qualification up to and including master's level or professional course (exceeding £1,000). Please ensure you familiarise yourself with the [Qualification Funding policy](#) before completing this form.

Section A – to be completed by the Applicant

Applicant Details			
Full Name:		Job Title:	
Faculty/Department:		Email Address:	
Please confirm that you meet the following criteria:			
<input type="checkbox"/>	I have successfully completed my probation.		
<input type="checkbox"/>	I am on a permanent or fixed term contract (FTC) and the FTC covers the length of the qualification and the two-year repayment period.		
<input type="checkbox"/>	I have considered at least two providers of this qualification.		
<input type="checkbox"/>	The qualification is part-time.		
<input type="checkbox"/>	The qualification commences after the closing date of the qualification funding application window.		
<input type="checkbox"/>	I have not been accepted for any qualification funding from St Mary's University within the previous 12 months.		

Qualification Details			
Name of Qualification:		Proposed Start Date:	Click or tap to enter a date.
Awarding Institution:		Anticipated End Date:	Click or tap to enter a date.

Costing Details			
Cost including Tuition, Registration Fees, etc. All documentation must be provided		Professional membership fees: This is only funded for the duration of the qualification	
Please state any further costs:		Please state any absence for study leave:	
Breakdown of Annual Costs:			
Please give a breakdown of the annual costs below, along with the total amount:			
Year 1:			
Year 2:			
Year 3:			
Year 4:			
Year 5:			
Total:			



Any additional expenses not detailed in this application must be paid for by the Faculty/Department. With regret, approximate costs cannot be accepted. Funding is not provided for travel costs/purchase of books. Your booking should only be made after you have received formal notification of the funding decision.

Repayment of Qualification (External courses only):

Please select your preferred option:

Learning & People Development pay the full fee to the course provider and the individual has their percentage deducted monthly through payroll.

Learning & People Development and the individual pay their percentages directly to the provider through separate invoices.

Supporting Statement

Please provide a copy of the qualification outline and other supporting information with this form. Please add links or list the attachments in the box below.

Please provide a brief supporting statement outlining why you believe funding for this qualification is essential to your professional growth and how it aligns with your role and our organisational goals.

In your statement you should explain how:

- the qualification is essential to your role and/or is essential to delivering the University's strategic objectives
- the qualification supports your career development.

(300 words max.):

Terms and Conditions

Please note that the funding received will be in the form of a loan which is to be repaid to St Mary's in the event of the staff member **leaving within a two-year period following the completion of the course**. This would be at the rate of:

- 100% if left within 6 months of completion of the course
- 75% within one year of completion
- 50% within eighteen months of completion
- 25% within the remaining six months.



By signing this agreement, I acknowledge that I have read and agree to adhere to the above condition and all other Terms and Conditions outlined in section 5 of the [Qualification Funding Policy](#).

I declare all information given in this form is accurate and true.

Signature:		Date:	Click or tap to enter a date.
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Section B – to be completed by the line manager

Line Manager Details	
Line Manager Name:	
Line Manager Email Address:	
Line Manager Job Title:	

Line Manager Supporting Statement
<p>Please provide a brief supporting statement outlining why you are supportive of this application.</p> <p>You may want to mention how this qualification is beneficial to the applicant's current role and the department, as well as if there was a need identified in their most recent appraisal.</p>

<p>Please confirm the following criteria has been met and considerations have been made:</p>

<input type="checkbox"/>	The application form has been fully completed (including all financial commitments).
<input type="checkbox"/>	The applicant has successfully passed their probation at the time of application submission.
<input type="checkbox"/>	The applicant has considered at least two providers of the qualification.
<input type="checkbox"/>	The applicant is not under any formal University procedures.
<input type="checkbox"/>	I understand the commitment of time needed by the applicant to successfully complete the qualification.

By signing this agreement, I declare all information given in this form is accurate and true.

Signature:		Date:	Click or tap to enter a date.
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Section C – to be completed by the Dean of Faculty/ Head of School or Director of Department

Dean/ Head/ Director Name:	
Signature:	
Date:	Click or tap to enter a date.



This form should be fully completed and returned to Learning & People Development (learninganddevelopment@stmarys.ac.uk). Funding decisions will be emailed to the individual and line manager. Incomplete forms will be returned and any resubmission outside of the qualification window will not be considered.

Section D – to be completed by the Authorising Body

Authorisation (Internal use only)

Funding Authorised:

Yes:	<input type="checkbox"/>	No:	<input type="checkbox"/>
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