Guidelines for Study Leave and Funding for Nurses in Children’s Health Ireland

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<th>Version</th>
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<tr>
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<td>Guideline Author(s):</td>
<td>Carol Hilliard, Caitriona Dennehy Liz Nolan, Fionnuala O’Neill</td>
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Approved by

| Director of Nursing OLCHC | Director of Nursing TSCUH | Director of Children’s Nursing Services NCH Tallaght |

Authorised by:

| Chief Director of Nursing CHI |

Authorisation Date

| 18th December 2018 |

Group Review of Terms of Reference

| 3-yearly |

Committee Review History

<table>
<thead>
<tr>
<th>Review Date</th>
<th>Reviewed By</th>
<th>Signature</th>
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1.0 Introduction

Children’s Health Ireland\(^1\) recognises the importance of supporting continuing professional development to enable nurses to meet the ever evolving needs of the children’s healthcare environment and to provide a safe, high quality nursing service to children and their families. Under the Nurses and Midwives Act 2011 (Government of Ireland 2011), professional development is the responsibility of both the individual nurse and their employing organisation. The CHI is committed to developing nurses to enable them to achieve their full potential, not only in the early stages of their career but throughout their employment.

The CHI will also fulfill any potential requirements for nurse education that may be required within the context of any changes to nursing legislation. These study days may be used to undertake education, training, development or to attend seminars and conferences relevant to the nurse’s professional development and are dependent on local service need. To achieve this, it is necessary to establish a standardised application and approval procedure for the granting of study leave.

1.1 Aim of the guideline

The following guidelines are intended to provide a framework to guide all nursing staff and their managers regarding the allocation of study leave and, where necessary, associated funding for continuing education, training and development. The guidelines will assist the CHI to maintain a consistent and equitable approach to decisions regarding allocation of funding and time off for training, education and professional development.

2.0 Applicable to

These guidelines are applicable to all nurses across the CHI, including:

- Clinical Nurse Managers
- Nursing Practice Development Coordinators
- Assistant Directors of Nursing
- Divisional Nurse Managers / Directorate Nurse Managers (DNM)\(^2\)
- Directors of Nursing
- Chief Director of Nursing

3.0 Definitions

For the purposes of this guideline, the following definitions will apply:

**Learning:** An end result or outcome, defined as a change in perspective or capability (behaviour, knowledge or attitude) whether of individuals, teams or the organisation as a whole.

**eLearning:** Learning that is achieved, supported and managed through the use of electronic information provision, services and systems.

**Blended Learning:** The thoughtful integration of face-to-face learning experiences with online experiences.

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\(^1\) Comprised of The National Children’s Hospital Tallaght, Our Lady’s Children’s Hospital Crumlin, Temple Street Children’s University Hospital and Urgent Care Centres

\(^2\) For the purposes of this guideline, the acronym DNM is used to denote the Divisional or Directorate Nurse Manager within a service.
Continuous Professional Development (CPD): Encompasses experiences, activities and processes that contribute towards the development of staff. CPD is, therefore, a lifelong process of both structured and informal learning.

Training: The acquisition of skills to a set standard, through instruction and practice, and takes a short term approach. It is usually concerned with improving capability of how something is done and covers business, technical and professional knowledge and skills.

Mandatory Training: Mandatory training is defined as any training that is deemed to be required by an organisation based on the policies, procedures and guidelines of that organisation and appropriate to an employee’s role and area of work.

4.0 Authority for approving study leave and funding

The CHI is committed to considering all reasonable requests for relevant study leave and funding. All study leave requests are discussed with the relevant line manager and DNM prior to submission to the Director of Nursing or his/her designated person in the individual hospital for final approval. For all study leave and funding applications to be considered they must be submitted to the Director of Nursing prior to the required closing date on the required application form.

The final decision for the allocation of study leave and funding is made by the Director of Nursing or his/her designated person in the individual hospital.

5.0 Guiding principles for the allocation of study leave and funding

5.1 Overarching principles

a. Study leave allowances and the allocation of funding are guidelines, not entitlements, and are discretionary.

b. Funding for courses and the allocation of study leave is granted on the basis of available resources, years of service, service need and career path requirement. Priority for study leave and funding will be given for courses which are essential for service provision and the priorities of the hospital and the CHI.

c. Professional development will include an element of personal development but should in some way contribute to improving the quality of service provided.

d. When the term “study day” is used, this refers to a 7. 8 hour day. For staff working part time hours or job-sharing all leave is granted pro rata.

5.2 Allocation of study leave and funding

a. Allocation of study leave and funding is based on timely submission of the application, presentation of relevant supporting documentation and subsequent approval by the appropriate line manager.

b. The level of funding is at the discretion of the Director, strictly subject to the availability of funding. A Director may approve 100% funding where there is a service requirement for advancement of individual staff in a particular role and/or skill.

e. Priority for study leave and funding will be given for courses which are essential for service provision and the organisation.

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3 The title “Nurse Manager” includes: CNM 2, CNM 3, Assistant Director of Nursing, Divisional Nurse Manager or Directorate Nurse Manager, Director of Nursing, Chief Director of Nursing.
f. The allocation of study leave and funding are interrelated and both will be considered in the context of supporting continuing professional development for nurses.

g. Applicants for study leave and funding for higher education programmes must submit their applications by a defined date each year. This will usually be in late May, but the exact date will be communicated to all nurses at the start of each year.

h. Applications for short term leave and funding, e.g. conferences or 1-day study days will be accepted all year round.

i. In the event of an individual leaving his/her post prior to completion of the study programme for which they have received study leave, the CHI will seek to recoup the study leave taken to date for that programme.

5.3 Conditions for allocation of funding

a. Applications for study leave and funding for courses will only be considered when accompanied by a copy of the application form, course content and fee confirmation.

b. All staff must have completed a probationary period of six months in post before study leave will be considered (apart from in-house mandatory study days). *(Exceptions to this will be based on a decision by senior nursing management.)*

c. All mandatory and statutory in-service training must be prioritized and must be up to date before consideration will be given to requests for study leave or funding.

d. Applicants for study leave and/or funding will produce evidence of their up to date compliance with mandatory and statutory training.

e. Applications for funding and study leave must be submitted yearly if the course duration is longer than one year (with the exception of the Graduate Diplomas in Specialist Practice Areas).

f. Funding is only considered for course fees and it does not include additional costs such as registration, books, study materials, unless these are specifically included in the overall course fees.

g. Where applicable, the terms of the *HSE HR Circular 020/2014: Sponsorship of Nursing/Midwifery Education Initiatives* will be applied with specific reference to:

"**Section 5: Repayment of Fees:** Where an employee is required to repeat elements of a programme they must remain in the employ of their current agency during the repeat period. If they cease employment or do not complete the programme they will have their sponsorship terminated and will be required to repay fees. Such repayments shall be made to the public health service agency where they were employed. In exceptional circumstances all the above repayments may be waived or deferred at the discretion of the employing Health Service Agency."

h. Further leave and/or funding will not be made in respect of years / modules / examinations which are repeated.

i. Previous funding or study leave granted to an individual will be taken into account when discussing study leave.

j. Retrospective approval will not be given.

5.4 Sharing of Learning

a. Staff undertaking a course with a research component will be requested to choose a topic relevant to their work / department. Subject matter should be discussed with CNM, DNM and NPDU.

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4 *HSE (2014) HSE HR Circular 020/2014: Sponsorship of Nursing/Midwifery Education Initiatives* HSE. Available at: [https://www.hse.ie/eng/staff/resources/hr-circulars/circ2014.pdf](https://www.hse.ie/eng/staff/resources/hr-circulars/circ2014.pdf)
b. Staff will be expected to feedback to the organisation following the course completion. This feedback will be in the form of informal feedback (orally or in writing or presentations) to colleagues for conference visits or formal feedback in the case of higher Diplomas and Masters programmes or any study that requires project work.

c. Publication of research should be considered. The hospital would support such publication through the Nursing Research structures.

6.0 Applying for and approving study leave / funding

(see Appendix 1 for overview of process)

6.1 Step-by-Step Process

Step 1. Discuss the planned study leave + funding with relevant line manager. This must be done before submitting an application. Note: Retrospective applications for leave or funding will not be considered.

Step 2. Complete Application Form For Study Leave and Funding (Appendix 2). Applications for study leave and funding for courses will only be considered when accompanied by:

- a copy of the application form
- outline of course content
- confirmation of fees / costs
- For Higher Education programmes: evidence of compliance with mandatory training and evidence of study leave granted in the preceding 3 years.

- Submit Application Form to Line Manager.

Step 3. Submit application form to Line Manager

Step 4. Line Manager approves the application.

Step 5. Once approved by line manager, the applicant submits the application to the DNM\(^5\) for review

Step 6. The DNM approves study leave in accordance with the allowances identified in Section 7.2 and 7.3, and approves short term funding if there is an identified funding source.

Step 7. Decisions about funding for Higher Education programmes are made at Local Higher Education Review Group on a yearly basis.

Step 8. Outcome of application is communicated in writing by Director of Nursing’s Office to the applicant and their line manager.

Notes:

- The application must be submitted before the closing date for applications- this may be a different date in each hospital.
- The Nurse Manager will consider the request for study leave with due consideration of the i) course content, ii ) relevance to the specialty / service need/ grade of the individual Registered Nurse and iii) previous study leave. These criteria will be determined on an individual basis.

6.2 Non-approval of application for study leave and/or funding

- A clear rationale for the decision of the CHI to not support the application must be communicated to the applicant.
- Should a nurse disagree with the outcome of the approval process, s/he may appeal this decision to their DNM. The final decision with regard to the approval of study leave and/or funding lies with the Director of Nursing.

\(^5\) DNM refers to Divisional Nurse Manager or Directorate Nurse Manager.
7.0 Duration of Study Leave

7.1 Study leave for mandatory and statutory study education and training
- Mandatory and statutory education includes but is not limited to, for example, hand hygiene training, Child Protection, fire safety, patient moving and handling, intravenous therapy.
- Study leave will be allocated to enable nurses fulfil their mandatory and statutory education and training requirements.
- The amount of leave allocated may differ between clinical services due to the particular mandatory requirements for nurses to undertake education and training to support the delivery of safe quality care.
- Application forms are not required for mandatory and statutory education and training.

7.2 Short term study leave
- This includes for example, single study days, conference attendance.
- Up to 3 days per annum paid leave may be granted by the organisation\(^6\), upon consideration of the nature of the request and the study leave previously allocated to the application. These days are allocated on a pro rata basis.
- Short term study leave is calculated over a calendar year, i.e. January to December.

Note: Long term study leave is calculated over the academic year, i.e. September to August.

Table 1: Study Leave duration in the CHI

<table>
<thead>
<tr>
<th>NVQ Level</th>
<th>Course Type</th>
<th>Proposed Allowances across CHI</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>All allowances based on ‘Up to a maximum of x days/year’ All days are 7.8 hours</td>
<td></td>
</tr>
<tr>
<td>Level 8</td>
<td>Stand-Alone Modules</td>
<td>4 days</td>
</tr>
<tr>
<td>Level 8</td>
<td>Primary Degree Grad Certificate</td>
<td>7 days</td>
</tr>
<tr>
<td>Level 9</td>
<td>Post Graduate Diploma</td>
<td>10 days</td>
</tr>
<tr>
<td></td>
<td>Year 2 Masters (after completion of PG Diploma as Year 1)</td>
<td>5 days</td>
</tr>
<tr>
<td></td>
<td>Masters Level 9 (2 years)</td>
<td>15 days over two years (no more than 10 days in Year 1)</td>
</tr>
<tr>
<td></td>
<td>ANP Programme</td>
<td>As per programme</td>
</tr>
<tr>
<td>Level 10</td>
<td>PhD</td>
<td>Arranged locally</td>
</tr>
</tbody>
</table>

\(^6\) Exceptions include courses etc requested by the organisation or required for service need (see 7.5)
7.4 **Online learning**

Where possible nursing staff should complete online learning programmes within the working day (programmes will be supported by the nursing service where reasonable and practicable.). Where this is not possible or does not occur, the staff member must produce evidence of programme completion. Subsequently, the CNM will at his / her discretion provide time in lieu in the working roster.

7.5 **Exceptions to study leave**

Exceptions to the defined period of study leave may be considered in the following instances:

- If, with the approval of the DON and DNM, particular service requirements necessitate the reduction or extension of the amount of study leave
- Site visits to other healthcare institutions deemed necessary to the ongoing and future development of CHI
- Clinical placements which are requirements of specialist programmes will be facilitated within existing staff complements.
- Study days which are specifically requested by senior nursing management (i.e. DNM/DON).

8.0 **Roles and Responsibilities**

8.1 **Nurses**

It is the responsibility of all nurses to:

- Take responsibility for identifying and maintaining own CPD including records of same.
- Participate in the personal and professional development planning process.
- Attend all mandatory training as appropriate to their role.
- Bring to the attention of their line manager any perceived learning and development needs.
- Attend in full and participate in any learning and development activity arranged to meet their needs.
- Evaluate the quality and effectiveness of any learning and development activity that they have participated in.
- Share knowledge/skills gained from learning and development that they have undertaken.
- Apply their new skills/knowledge in the workplace.
- Apply for study leave and funding using the relevant application form.
- Where funding is allocated to a nurse, s/he will comply with the principles indicated in Section 5.0 of this guideline.
- A nurse may be liable to refund fees and/or study leave if s/he:
  - discontinues the programme or otherwise do not complete the programme within the time frame designated by the relevant Third Level Institute, or
  - does not complete any other CHI requirements associated with the programme within an agreed timeframe following successful completion of the programme
  - does not comply with the terms of the HSE HR Circular 020/2014: Sponsorship of Nursing/Midwifery Education Initiatives.

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HSE (2014) *HSE HR Circular 020/2014: Sponsorship of Nursing/Midwifery Education Initiatives* HSE. Available at: https://www.hse.ie/eng/staff/resources/hr-circulars/circ2014.pdf

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CHI Nursing Executive 2019
8.2 Line Managers

It is the responsibility of all line managers to:
- Ensure that nurses are aware of this guideline.
- Ensure that nurses complete the Leave & Funding application form. Line Managers review and decide to approve or reject the application. If approved the Line Manager forwards to the Divisional Nurse Manager.
- Ensure that all nurses within their area(s) of responsibility attend all relevant mandatory and statutory training.
- Regularly review the learning and development needs of all nurses within their area(s) of responsibility through the personal and professional development planning process.
- Ensure that all nurses in their area(s) of responsibility have equal access to learning and development opportunities.
- Ensure that all non-attendance at learning & development initiatives is monitored on a regular basis and that systems are in place locally to follow up non-attendance with nurses.
- Facilitate the participation of nurses in learning and development initiatives while addressing any potential for impact on service delivery;
- Retain records of personal development planning and learning and development activity within their department.

8.3 Divisional Nurse Managers

It is the responsibility of all DNMs to:
- Consider and approve/decline (with clear rationale) applications from nurses as recommended by line management to participate in learning & development initiatives.
- Ensure that learning and development activities fall within the allocated budget.
- Analyse information from audits, patient feedback and incidents and use this to inform strategic direction for learning and development within their division.
- Monitor attendance at mandatory training and take action if/where there is unsatisfactory compliance.
- Review and approve annual departmental learning and development plans ensuring they are linked to the objectives of the hospital and the CHI.

8.4 Director of Nursing

It is the responsibility of the Directors of Nursing to:
- Be the final decision-maker with respect to the approval of study leave and/or funding.
- Ensure that learning and development activities fall within the allocated budget.
- Analyse information from audits, patient feedback and incidents and use this to inform strategic direction for learning and development within the hospital and the CHI.
- Monitor attendance at mandatory training and take action if/where there is unsatisfactory compliance.
- Review and approve annual departmental learning and development plans ensuring they are linked to the objectives of the hospital and the CHI.
9.0 Implementation and Education Plan

This guideline will be disseminated using existing communication structures within the CHI.

10.0 Evaluation and Audit

This will include:

- feedback and evaluation from nursing staff on the guidelines to contribute to ongoing guideline development
- audit of attendance at mandatory and statutory training
- audit of the allocation of study leave and funding within the nursing service
Appendix 1: Process for applying for Study Leave and Funding

1. Nurse identifies programme of study
2. Discuss with Line Manager
3. Submit application form and programme details Line Manager
4. Line Manager reviews application and agrees suitability
5. Applicant submits application to DNM
6. DNM reviews application and makes decision re study leave and finding

**Study Leave**
- Consider previous study leave & compliance with mandatory / statutory education
- Select appropriate duration of study leave (TABLE 1)

**Funding: Short Term**
- DNM or designated person review application
- Identify funding source
- Approval of funding occurs in consultation with DON

**Funding: Long Term**
- Local Higher Education Review Group will review application
- Identify funding source
- Allocate funding
Appendix 2: Application for Study Leave & Funding

*Please ensure that you complete each section in full. Please attach details of course/conference with application. Applications will not be processed without submission of this information.

<table>
<thead>
<tr>
<th>Name:</th>
<th>Grade:</th>
<th>Tick hospital as appropriate OLCHC</th>
<th>TSCUH</th>
<th>NCH</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Department ________________________</td>
<td>Personnel No ______</td>
<td></td>
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<tr>
<th>Permanent:</th>
<th>Temporary:</th>
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</table>

Full-time ☐ Part-time ☐ If part time, state WTE ______

**SECTION A: CONFERENCE / SEMINAR ONLY**

**TITLE OF CONFERENCE / SEMINAR:**

________________________________________________________

________________________________________________________

DURATION OF EVENT: ________________

**DATE:** ________________________

**VENUE:** ________________________

**PAPER PRESENTATION** YES ☐ NO ☐

**TITLE:** ________________________

________________________________________________________

________________________________________________________

**POSTER PRESENTATION** YES ☐ NO ☐

**TITLE:** ________________________

________________________________________________________

________________________________________________________

**SECTION B: ACADEMIC COURSES ONLY**

**PLEASE TICK WHICH COURSE IS BEING APPLIED FOR:**

- STAND ALONE MODULE ☐
- CERTIFICATE COURSE ☐
- DEGREE COURSE ☐
- HIGHER DIPLOMA ☐
- POST GRAD DIPLOMA ☐
- MASTERS ☐
- NURSE PRESCRIBING ☐
- ADVANCED PRACTICE ☐
- Other ________________________

**TITLE OF COURSE (PLEASE ENSURE CORRECT TITLE IS USED):**

________________________________________________________

________________________________________________________

**HIGHER EDUCATION INSTITUTION / ORGANISATION**

________________________________________________________

DURATION OF PROGRAMME: ________________

**DATE COMMENCING:** __/__/____

**INTENDED COMPLETION DATE:** __/__/____

PLEASE OUTLINE WHY YOU WISH TO PURSUE THIS PROGRAMME AND WHAT BENEFIT WILL THIS COURSE BE TO PATIENTS / SERVICE / ORGANISATION / YOU AS AN INDIVIDUAL?
### Application for Study Leave & Funding

#### FUNDING

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Fees per annum</td>
<td>€_______</td>
</tr>
<tr>
<td>Total cost of programme</td>
<td>€_________</td>
</tr>
<tr>
<td>Funding requested</td>
<td>Yes ☐ No ☐</td>
</tr>
<tr>
<td>Amount</td>
<td>€______</td>
</tr>
<tr>
<td>I request direct payment of fees / invoice by</td>
<td>insert name of hospital</td>
</tr>
</tbody>
</table>

Has funding been requested or received from any other source:

Yes ☐ No ☐

If yes, please give details, e.g. source, amount: …………………………………………

#### STUDY LEAVE

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Study leave requested</td>
<td>Yes ☐ No ☐</td>
</tr>
<tr>
<td>Amount</td>
<td>_____ days</td>
</tr>
<tr>
<td>Amount of Study Leave granted in last 3 years (excluding mandatory and statutory training)</td>
<td>Amount _____ days</td>
</tr>
</tbody>
</table>
| Please give summary details of the purpose of this leave: | …………………………………………

I have read & understand the Guideline on Study Leave:

Yes ☐ No ☐

My mandatory & statutory education and training is up to date:

Yes ☐ No ☐

Do you agree to comply with suggestions regarding research projects?

Yes ☐ No ☐ N/A ☐

FOR HOSPITAL/HSE FUNDED ACADEMIC COURSES & WHEN APPLYING FOR FEES

Tick ☐ if Not Applicable

I understand that I may be liable to repay any sum received to the Hospital/HSE if (a) I discontinue the course or otherwise do not complete the course within the time frame designated by the Hospital/college or (b) I cease working in Hospital/HSE within a period of 6 ☐, 12 ☐, 24 ☐ or 36 ☐ months (please ✓) following completion of course.

Signature of Applicant: ______________________________________ Date: ______ / _______ / ___________

### APPROVAL OF REQUEST FOR STUDY LEAVE AND/OR FUNDING

(please refer to Guideline on Study Leave & Funding for Nurses to identify the appropriate approval level for each application)

**CNM 2/3 APPROVAL:**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>I support this application</td>
<td>Yes ☐ No ☐</td>
</tr>
<tr>
<td>I confirm that the applicant’s mandatory &amp; statutory education and training is up to date</td>
<td>Yes ☐ No ☐</td>
</tr>
</tbody>
</table>

Signature ______________________________ Date:  _____ / ____ / _________

**ADON / DNM**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Study leave approved</td>
<td>Yes ☐ No ☐</td>
</tr>
<tr>
<td>Number of days approved</td>
<td>________________</td>
</tr>
<tr>
<td>Funding approved</td>
<td>1) Short term funding (conference / seminar) Yes ☐ No ☐ Refer to DON ☐</td>
</tr>
<tr>
<td>Percentage of funding agreed</td>
<td>_________ %</td>
</tr>
<tr>
<td>Total funding granted</td>
<td>€__________</td>
</tr>
<tr>
<td>2) Higher Education Programmes – Refer to Local Higher Education Review Group</td>
<td>Yes ☐ No ☐</td>
</tr>
</tbody>
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Fund source: Hospital ☐ DOH ☐ HSE ☐ Other …………………………………………

Signature of ADON/DNM ______________________________ Date:  ____ / ___ / ______

**Local Higher Education Review Group:**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funding for Higher Education Programme approved</td>
<td>Yes ☐ No ☐</td>
</tr>
<tr>
<td>Percentage of funding agreed</td>
<td>_________ %</td>
</tr>
<tr>
<td>Total funding granted</td>
<td>€__________</td>
</tr>
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</table>

Signature of Chair of Review Group ______________________________ Position: ______________ Date:  ____ / ___ / ______

**Director of Nursing:**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Signature of DON ______________________________ Date:  ____ / ___ / ______</td>
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**OFFICE USE ONLY:**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Study days granted</td>
<td>_____ days</td>
</tr>
<tr>
<td>Funding</td>
<td>€_______</td>
</tr>
<tr>
<td>Payroll</td>
<td>_______</td>
</tr>
<tr>
<td>EFT</td>
<td>__________</td>
</tr>
<tr>
<td>Cheque</td>
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Letter confirming approval sent on: ______ / ____ / _____