NHS Lothian Charity

Charity-funded course, travel and accommodation application form guidance

Introduction

Thank you for considering submitting an application to NHS Lothian Charity. Our hope is to make the application process as simple and successful as possible. This guide sets out the information we hope to see in response to the questions in the application form. Please read this fully before making a start on your application, as this will maximise your likelihood of success.

However, remember this is not a test, if at any point you have questions or would like to ask for advice, please do so by emailing loth.charity@nhs.scot. We are here to help.

When to use this form

This form should be used in the following circumstances:

- If you wish for the NHS Lothian Travel Team to book and pay for your course, conference, accommodation and/or travel.
- If you wish for the Travel Team to raise a Purchase Order (PO) so you can book.
- If you wish to book and pay for the course/conference yourself once funding has been approved and claim back through expenses.

General note

- You cannot save the form as you go so you may wish to prepare your responses to the questions in a word document and cut and paste them into the form. All of the questions are listed in this document to help you plan your responses.
- In this document you will see certain questions have an asterisk (*) by them. These questions are mandatory, and you will not be able to progress or successfully submit your form until these are completed.

- The Charity is unable to provide financial support to any core training or education. No mandatory/required training will be supported.
- Retrospective requests are not accepted so please ensure you gain prior approval before making purchases. Any spend without approval is done at your own risk.
- Refer to Professional Development, Education and Training Support - NHS Lothian Charity and Travel, Subsistence and Accommodation Support - NHS Lothian Charity to understand the parameters of Charity support available.
- Please note NHS Lothian Charity observes NHS Lothian's travel and education policy of online before local, local before national, national before European, European before global.

Accurate costs are required for the application so please ensure you have obtained the details of any course/conference fees and approximate costs for travel and accommodation as required. All costs must be entered in GBP and should include VAT. You can use oanda.com to convert amounts into GBP.

Section 2 - Personal Details

The information in this section will be used to enable us to contact you about any queries relating to your application. These details are also used for any bookings so please ensure you use your full formal name.

First name*

Last name*

Job title*

Pay band
This information is not used in the assessment of the application. We ask about your pay band/grade as we are keen to understand the staff we are reaching.

Department*

Directorate*
The information about directorate helps us to match your application with possible funding sources. By 'directorate', we mean the functional division of NHS Lothian with in which your work is based, e.g. Women's & Children's Services, Edinburgh Cancer Centre, etc.

Site/base/location*
This is the name – we ask for the address in the next question

Site/base/location address
The information about site helps us to match your application to possible funding. If your project will support multiple sites, please provide the one you are based at but give details about the other sites supported later on in the form.

Applicant's Site Address*
Please ensure that Street Address, City, Local Authority/County, Postcode and Country are completed or else the form will throw back an error when you try to progress.

Applicant's Work Email Address*
This is the route you will most commonly be contacted by

Applicant's Work Phone Number

Line Manager's Name*

Line Manager's Job Title

Confirmation of Line Manager's support*
We require confirmation from your line manager that they are in agreement with you attending the course and that they can release you from your rota to attend.

If you are applying for funding for multiple people, please ensure that approval is provided for each individual. You can include up to three people on a single application form.

Please upload confirmation that your line manager is aware of and supportive of your application - Max. file size: 2 MB.

A brief email is sufficient, or a signed study leave form, a formal letter is not required. If you are booking on behalf of others, confirmation will need to be uploaded for them too.

Please note only standard file types can be uploaded through the form. .txt files are not supported, so please ensure your documents are saved in an accepted format such as .doc, .docx, .pdf, or .xlsx before uploading.

Are you completing this form for course/conference to be booked and fees to be paid by NHS Lothian's Travel Team?*
Yes – select yes if you wish for the travel team to pay for and/or book the course/conference once funding has been approved.
No – select if you wish to book and pay yourself once funding has been approved, then claim back through the expenses process.
Also complete this section (ticking yes) if you are asking for the travel team to raise a purchase order (PO) to allow you to book your own place once funding has been

approved, or you are not seeking funding for a course/conference. Please note that you want the Travel Team to raise a PO in the 'any additional information we should know to help with your booking?' question in Section 3 – Course/Conference Information.

Please let us know approximate costs for the course/conference*
In order to allow the Charity to allocate funds please provide your best estimate of costs.

If you do not require funding towards the cost of the course/conference, please enter 0 in the field as its completion is mandatory.

Please enter the total course or conference cost in GBP (£), including VAT. If the cost is in another currency, you must convert it to GBP to ensure the correct amount is paid. (for currency conversion, you can use oanda.com)

If you are not applying for course or conference fees to be paid, please enter **0**. If you are applying for funding and do not provide a cost (or only provide an estimate that is clearly inaccurate), your application may be returned or rejected. Applications are approved based on the costs provided, and we cannot guarantee additional funding or reimbursement for the course if costs are entered incorrectly or incompletely.

Funding must be approved in advance to ensure expenses can be covered.

Are you completing this form for accommodation to be booked and paid through the NHS Lothian's travel team? *
NHS Lothian Charity follows NHS Lothian's standing financial instructions relating to the booking of travel. Booking via the Travel Team is highly recommended.

Yes – select yes if you wish for the travel team to book and pay for your accommodation

No – select if you wish to book and pay yourself and claim back through the expenses process.

Please let us know approximate costs for accommodation*
We appreciate that it can be hard to predict accommodation costs. However, in order to allow the Charity to allocate funds, please provide your best realistic estimate of costs based on research. In keeping with NHS Lothian's Travel Policy, the charity will only support accommodation costs at the following maximum nightly rates, inclusive of breakfast and VAT; £200 for London, £150 for all other UK locations, £200 for locations outside the UK.

Costs for accommodation should be entered in GBP (£), including VAT. If the cost is in another currency, please convert it to GBP and then enter the GBP total in the box (for currency conversion, you can use oanda.com).

If you do not require funding towards accommodation, please enter 0 in the field as its completion is mandatory.

Are you completing this form for travel to be booked and paid through NHS Lothian's Travel Team?*

NHS Lothian Charity follows NHS Lothian's standing financial instructions relating to the booking of travel. Booking via the Travel Team is highly recommended.

Yes – select if you would like the travel team to book and pay for your travel- by rail or air.

No- if you do not require travel or you intend to purchase your travel yourself and claim back through expenses.

Type of travel

You will only be asked to complete this if you indicate that you would like the travel team to booked your travel. Please select all that apply.

Please let us know the approximate cost for travel*

We appreciate that it can be hard to predict travel costs. However, in order to allow the Charity to allocate funds please provide your best realistic estimate of costs based on research.

Costs for travel should be entered in GBP (£), including VAT. If the cost is in another currency, please convert it to GBP and then enter the GBP total in the box (for currency conversion, you can use oanda.com).

If you do not require funding towards travel please enter 0 in the field as its completion is mandatory

Please briefly explain why this request is not being funded by the service/department training budget*

In this question please explain why the funding for this course/conference is not being supported by an NHS Lothian budget. The Charity is keen to understand how it is adding value to the core budget not simply replacing it.

Section 3 - Course/Conference Information

NHS Lothian Charity's mission is to have a positive impact on health in the Lothians. We do this through our priority objectives. Please tell us which priority objective your course/conference will impact on:

- Enhanced patient and carer experience

- Improved clinical outcomes for patients
- Reduced health inequality
- Improved community health
- Improved staff wellbeing and professional development

Please tick all that apply.

Please explain how the course/conference will make a difference to patients and /or carers?*

The Charity is keen to support education and activity that had an end benefit for patients or their family/informal carers? It might be that the learning from the course improves your conversations with families at a time of bad news, or that the new technique you are learning about will improve recovery time or that the sharing of info from other professionals in the field will help the patients have improved outcomes.

Please explain how the course/conference will make a different to you (and NHS Lothian staff attending with you)? *

Please explain what difference the course/conference will make you both professionally and if relevant personally. Please consider the impact on knowledge, skills, confidence, etc.

How did you learn of the opportunity and agree with your colleagues and manager you would attend? *

The Charity is keen to understand the process behind the decision you would attend the course/conference. We are interested to understand what motivated the decision to attend, have you been before, who identified the opportunity e.g. you or your manager, have others in the team attended the same/similar, was the opportunity widely circulated, etc.

Course/Conference Details

Do you need the Travel Team to register you for the course/conference, or will you register yourself once funding is approved?*

If you intend to register and pay for the course yourself, then claim the cost back on expenses once funding is approved, please select 'I will register myself'. You must also state that you will book and claim back the course fees in the 'Any additional information' section below. It is important this is completed correctly, as we cannot fund the same course twice. If you do not advise us that you plan to claim back via expenses, we will assume the Travel Team should pay the fees and will not be able to reimburse any duplicate costs incurred.

I will register myself once funding is approved; I only need the Travel Team to pay for the course.

- Please select this option if you wish for the travel team to raise a purchase order (PO) so that the provider can send an invoice which will then be paid.
- Please select this option of you wish to book yourself and claim back through expenses. (Please also note this in the 'any additional information we should know to help with your booking?' question below)

I need the Travel Team to register me when they pay for the course.

Please select this option if you wish for the travel team to both book and pay for your place.

How many places have you had approval to book for.

Please ensure you have uploaded line manager's approval for all of the people/places you are requesting. You can use the 'previous' button at the bottom of the page if you need to go back and do this. Please do not use the back button at the top of the screen to ensure you don't lose the form details.

Please note you will be asked from information about additional people as the form progresses so ensure you have all their details.

If you are hoping to make an application for more than 3 people, you will need to complete an additional application. We apologise for any inconvenience this may cause but hopefully you can cut and paste the information that you prepared for the first form into the second one. You will also receive a notification email on submission of the form with all the details and you can copy and paste from there.

Title of the course/conference*

Please ensure you include the full title of the event as it is on promotional material to ensure that the correct event is booked. This information is also used to help the assessment panel understand the request.

Address of the conference/course

Please note the full address is required to ensure that the correct event is booked.

Supplier name

What is the name of the company providing the event? Please ensure this is as it is detailed on any payment information.

Course start date

Applications submitted less than four weeks before the course start date will be rejected.

Course end date
The course start and end dates are required to ensure that the correct event if booked.

Is there an early bird discount date?
An early bird discount is when the fees are cheaper if booked earlier.

What is the early bird discount date? *
You will only be asked if you select there is an early bird discount. Please provide the date of the last day the early bird discount is available.
Where the early bird booking deadline is less than four weeks away, there may not be enough time to claim the discount. The full course cost should therefore be included above, to avoid a shortfall in the funding approved.

Membership/student number (if applicable)
Some events may have discounts for participants who are organisation members or students so please provide these if relevant

Please let us know of any dietary requirements
Providing this information will ensure that these are catered for at the event.

Is there an additional information we should know to help with your booking?
Please use this box to tell us anything else the travel team or assessment panel would find useful e.g. which workshops you wish to attend if there are choices.
If you are completing this form on behalf of colleagues and will not be attending the event please add your name, job title and email to this box and ensure you complete the application form details for 'Person 1' as the lead person attending. if you intend to register and pay for the course yourself, then claim the cost back on expenses once funding is approved, please ensure you let us know here. Please also use this box to let us know if there are different fee options for the course (for example, different membership types), and which option we should select.

Uploading course/conference promotional materials

This information facilitates the booking/payment process but is also considered as part of the assessment process so please ensure you attach at least one of the following:

Course flyer, website print out or the website link. If you have access to the registration form or an invoice, please attach those too.

At least one document must clearly show the course name, cost, and date on the same document. If the document(s) or link you provide lists different price options or registration types (for example, based on specialism or membership type), you

need to let us know exactly which option to book in the additional information question above to ensure we book you on the correct course.

If you provide a website link, please ensure the page you have provided has the course name, cost and date. Please do not share a generic link.

Section 4 - Accommodation Requirements

You only need to complete this section if the course/conference attendance will require you being away from home overnight and wish for the Charity to support the costs of this accommodation. You need to complete this section regardless of if you are booking yourself or if the Travel Team are making the booking on your behalf.

Where do you require the accommodation?*
Please provide details of preferred hotel or specific accommodation/location which must include Postcode. General descriptions such as "near the venue" will result in your application being rejected.

Number of people who require accommodation to be booked.*
Please ensure you have uploaded line manager's approval for all of the people/places you are requesting. You can use the 'previous' button at the bottom of the page if you need to go back and do this. Please do not use the back button at the top of the screen to ensure you don't lose the form details.

Date of arrival*
Please indicate the date of the first night you will need to spend in the hotel. This may be the day before the event if it is not practical to travel the day of the event and arrive on time.

Applications submitted less than four weeks before the accommodation is required will be rejected.

Number of nights
Please indicate the number of nights that accommodation is required for. Please note, it is expected that you will travel home as soon as the event is finished unless it is not possible to do so.

Number of rooms
If there is more than one person attending the event please indicate the number of rooms you require. Please note there is no expectation you share a room with your travelling companion. However, you may wish to keep costs down.

Number of persons per room
Please indicate 1 if you are a solo traveller or 2 if you are sharing a room with someone else from NHS Lothian attending the event.

Is breakfast required?
Please indicate if you require breakfast at your accommodation. Please consider if the event provides breakfast when making your selection.

Is an evening meal required?
Please consider if the event provides an evening meal when making your selection.

Please provide estimated costs per person per night
We appreciate that accommodations costs can vary depending on time of booking but please provide a best realistic estimate of the costs based on research. This is required as part of the assessment process and to provide a guide for the travel team if booking. Please note there is an expectation that charitable money will be spent responsibly on moderately priced accommodation not at the luxury end of the market.

Costs should be entered in GBP (£), including VAT. If the cost is in another currency, please convert it to GBP and then enter the GBP total in the box (for currency conversion, you can use oanda.com).

If this cost is a Preferential/Subsidised Rate or Special Promotion, please provide details and any associated reference/code
Some events will have negotiated a preferential rate for accommodation for participants. If that has been indicated on any of the event material, please provide information in this section.

Section 5 - Travel

You only need to complete this section if you need to travel out with Lothian to attend the event and have the Charity support the costs of this travel.

Reason for travel
Please explain why you are travelling

Train bookings

You only need to complete this section if train travel is required

How many people are you making train bookings for.
Please ensure you have uploaded line manager's approval for all of the people/places you are requesting. You can use the 'previous' button at the bottom

of the page if you need to go back and do this. Please do not use the back button at the top of the screen to ensure you don't lose the form details.

Travelling from*
Please indicate the station you wish to depart from (closest to home or work)

Travelling to*
Please indicate the station you wish to arrive at (closest to event)

For both stations, please indicate a station preference if the town/city you are travelling to has more than one station e.g. London Kings Cross, Edinburgh Haymarket

Date of departure*
Applications submitted less than four weeks before departure will be rejected.

Earliest time of departure*

Latest time of arrival

Date of return*
Please provide details to enable the travel team to book trains that meet your needs. There is no need to provide this if you are not asking the Travel Team to book for you.

Earliest time of departure for return journey*

Additional information
Please provide any additional information/preferences below that will be helpful in assisting the travel team with your booking.

If you are booking yourself and wish to claim costs via expenses, please indicate costs in this section.

The travel team may not be able to facilitate your preferences but if you would like a quiet coach, a table, a forward-facing seat, etc., please indicate in this section.

Flight details

You only need to complete this section if attendance at the event will require you to travel by air.

How many people are you making the flight bookings for*
Please ensure you have uploaded line manager's approval for all of the people/places you are requesting. You can use the 'previous' button at the bottom of the page if you need to go back and do this. Please do not use the back button at the top of the screen to ensure you don't lose the form details.

Travelling from*
Please indicate the airport you wish to depart from (closet to home or work)

Travelling to*
Please indicate the airport you wish to arrive at (closet to event)

For both airports, please indicate an airport preference if the town/city you are travelling to has more than one airport e.g. London City, Paris Charles de Gaulle

Date of departure*
Applications submitted less than four weeks before departure will be rejected.

Earliest time of departure*

Latest time of arrival

Date of return*

Earliest time of departure for return flight

Additional Information

Consider what additional information/preferences might be helpful in assisting the Travel Team with your booking.

Baggage requirements*

Luggage weight
Please provide details to enable the travel team to book flights that

meet your needs. There is no need to provide this if you are not asking the travel team to book for you.

Section 6 - Person 1: Additional Personal Details for Travel Bookings

Person 1: full name as it appears on passport*

Passport number for international flights

Passport issue date

Passport expiry date

Date of birth*

Nationality
This information is only required if flights are being booked on your behalf

Email address to send e-tickets*

Mobile phone number*

Address for correspondence
Please fill this in for any application for travel.

Sections 7 & 8 - Person 2 and Person 3 Details

You will only be asked to complete these if you are submitting a joint application with colleagues. If that is the case, please ensure that these sections are completed fully and accurately.

Section 9 - Sharing the Learning

How will learning be monitored/shared/cascaded?*
We are keen to understand how you will share your learning with colleagues who are not able to attend the event, or support colleagues to apply learning if they are attending alongside you.

Section 10 - Terms and Conditions

Please read the Charity's terms and conditions and confirm you are willing to abide by them.