

STANDING ORDER NO 53

THE ROYAL BERMUDA REGIMENT LEARNING CREDIT SCHEME

1. The Royal Bermuda Regiment seeks to promote lifelong learning among members. The Learning Credit scheme aims to facilitate this in a fair and equitable way. This scheme is realized through two mechanisms:

a. The Standard Learning Credit (SLC) scheme is available to all serving personnel and supplies financial support, throughout the career of Regiment's Service Personnel (SP), for multiple, **small-scale Learning Purposes** to further motivate SP to pursue personal development throughout their Service.

b. The Enhanced Learning Credit (ELC) scheme is available to SP who have served three or six years with the cost of **medium to large-scale Learning Purposes**. The Scheme allows a single award in each of a maximum of three separate Financial Years. ELCs may be claimed for learning towards attaining accredited qualification at Level 3¹ or higher. The ELC scheme permits SP to pursue their personal development, during their Service, subject to the eligibility criteria being met.

2. All SP eligible to receive Learning Credit support are required to adhere to this Direction.

SCOPE

3. The generic use of the term SP throughout this Direction implicitly includes serving part-time and full-time personnel who meet the eligibility criteria for this scheme. These definitions provide the scope for this Direction:

a. The Designated Officer for the Learning Credit scheme is the RCMO.

b. The term 'Learning Provider' (LP) is used to describe those learning and educational institutions that result in the award of a nationally recognised qualification.

c. The term 'Learning Purpose' is used to describe the reason or objective of learning, which must be in direct pursuit of a nationally recognised qualification in order to be eligible for Learning Credit support.

d. The terms 'applicant,' 'claimant' and 'learner' describe individuals accessing the education support scheme. For ease, the term SP will be used throughout.

AIMS

4. The aims of the Learning Credit schemes are:

¹ <https://www.gov.uk/what-different-qualification-levels-mean/list-of-qualification-levels>

- a. To provide funding support to SP who wish to enhance their educational or vocational achievements.
- b. Enhance the reputation of the RBR, thereby encouraging the recruitment and retention of high quality SP.

FEATURES OF THE SLC SCHEME

5. SLC is a personal development refund scheme and operates as an annualized allowance, available each FY. It does not operate as an account in which the allowance can be carried forward from FY to FY, nor does the scheme permit retrospective payments from previous FY, except in exceptional operational or compassionate circumstances. SLC is paid, as a refund, to SP upon completion of a Learning Purpose.

6. SLC is not an entitlement. Provided SP fulfil the relevant criteria (set out below) they will be eligible to claim SLC support. Eligible SP may claim 80% of fees, up to a maximum of \$250 per FY, paid to SP's for certain personal development courses, examinations and support. SP in receipt of funding are expected to make a personal contribution using their own funds, as well as using off duty or leave periods for study. Undertaking SLC funded study does not confer duty status and does not count towards training commitments or bounty arrangements.

FEATURES OF THE ELC SCHEME

7. The features of the ELC scheme:

- a. ELC is not an entitlement unless SP fully satisfies the eligibility criteria of the scheme to claim ELC support.
- b. ELC is not a refund scheme. ELC funding cannot be claimed retrospectively.
- c. ELC is an individual award to assist in the personal development of eligible SP. It cannot be transferred to any other individual.
- d. ELC awards will fall into two categories based on time served and are available as follows:
 - (1) **Lower Tier Award.** Upon completion of the third year of service, a SP may apply for funding for up to a maximum three awards of \$1k per FY.
 - (2) **Upper Tier Award.** Upon completion of the sixth year of service, a SP may apply for funding for up to a maximum of three awards of up to \$2k per FY.
- e. Providing SP meets all the eligibility criteria, they may make ELC claims in up to three separate FYs (which need not be consecutive and may be a combination of Lower Tier and Upper Tier awards) while in service to a maximum of three awards.

f. This support is provided on a 'burden sharing' basis reflecting the mutual benefit that personal development brings to SP and the organisation. SP in receipt of ELC funding are expected to make a personal contribution of at least 20% of fees using their own funds, as well as using off-duty or leave periods for study. Undertaking ELC funded study does not confer duty status.

8. SLC and ELC awards cannot be combined.

CONSIDERATIONS WHEN EVALUATING A COURSE OF STUDY

9. Before embarking upon an activity for which Learning Credits (both SLC or ELC) may be claimed, the SP on the advice of the RCMO should consider the following:

- a. Relevance of the course or qualification to their personal development goals and choice of funding.
- b. That the proposed activity has a substantial developmental value or, where applicable, is appropriate to the SP's personal development needs and within their ability.
- c. Their ability to cope with the pressures of study (or provision of evidence for assessment), the flexibility of the study method and the risk of disruption, and loss of course fees, by exigencies of service life.
- d. The SP must be able to demonstrate that the activity will directly benefit the service.
- e. SP who claim ELC support may not simultaneously claim SLC support.
- f. That any learning activity undertaken must be done so by the most cost-effective means.
- g. That proof of learning has taken place must be produced.
- h. For second and third claims, the SP must provide proof that they have completed their Learning Purpose for their previous claims.
- i. The learning credit scheme is based upon the principle that SP will make a personal contribution. The Regiment contribution will not exceed 80% of the gross course cost. SP will meet their 20% personal contribution from their own resources.

10. Additionally, applicants for ELC awards must satisfy these conditions:

- a. The RCMO must be satisfied that the LP is an accredited educational institution.
- b. If a number of separate courses are undertaken but combine to form a discrete, single Learning Purpose, delivered by one LP, then ELC can fund the total cost. SP, with the RCMO's advice, must be able to prove the validity of the proposed combination of courses in contributing to the Learning Purpose.

c. Only one ELC claim is permitted per Financial Year (FY (1 Apr-31 Mar)) and must relate to learning that commences that FY. For longer courses, where the academic and FY are out of sync, it is permissible to use one claim for several modules that count towards a continuous block of study, which may extend into the subsequent FY. In all such cases, the start date of each course module must be within twelve months of the start date of the earliest. Additionally, where it is clear from the outset that a modular course is intended to be completed in one FY, one academic year or one calendar year, only one ELC claim is to be made for the entire course by claimants. The RCMO will not authorise the splitting of this type of modular course to enable more than one ELC claim.

QUALIFYING SERVICE FOR SLC AND ELC ELIGIBILITY

11. SP must be in good standing – having satisfied the annual camp and annual drill requirements as outlined in the Defence Act 1965.
12. All SP in good standing, regardless of time served, are eligible to make SLC claims.
13. In order to make ELC claims, scheme members must complete the required length of eligible service before submitting the ELC claim form and prior to commencing the course of study for which ELC support is being claimed.
14. The service requirement is as follows:
 - a. **For ‘lower tier’ claims the SP must have completed three years of service.**
 - b. **For ‘upper tier’ claims the SP must have completed six years of service.**
15. Time spent on an unpaid career break does not count as qualifying service but an ELC claim can be submitted for learning to take place during a career break.
16. Maternity/paternity leave periods less than a six months will count as qualifying service.
17. Period to use ELCs. SP must commence the course in relation to which they are claiming an ELC award within 6 months of applying.

LEARNING PURPOSES ELIGIBLE FOR LEARNING CREDIT CLAIMS

18. **SLC Claims.** Subject to the eligibility criteria above, where applicable, SP may claim SLC support for the following purposes:
 - a. **External courses and qualifications.**
 - (1) Part-time academic and vocational courses at Further Education colleges and similar institutions.

- (2) Learning courses which require regular attendance at a local access centre.
- (3) Courses of individual tuition (including foreign language). Leading to the contribution to, or award of, an accredited qualification.

- b. **Distance learning courses.** Distance learning courses are eligible
- c. **External examinations.** Fees paid for examinations are eligible. A refund is also admissible for the cost of an assessment, which leads to the award of a recognised qualification following a course for which no fees have been paid.
- d. **Professional bodies and institutes.** Initial registration and accreditation fees paid to professional bodies and institutes expressly to gain qualifications (i.e. Certificates or Diplomas rather than categories of membership) are eligible.
- e. **Credit transfer fees.** Fees charged by colleges to calculate the amount of course credits which may be awarded to a SP based upon previous academic and vocational qualifications and experience are eligible.
- f. **Coaching and management of sport and Adventurous Training (AT).** Courses and qualifications which are required for the coaching and management of sport or AT are eligible.
- g. **Initial driver training courses.** SLCs may be used to fund driving training in order to obtain a first (manual transmission) driving licence, and any further advanced driving qualifications.
- h. **Diving qualifications.** SLC's may be used to fund initial PADI or BSAC qualifications and further advanced qualification.

19. **ELC Claims.** ELC may be claimed for part or full-time higher-level study, whether conducted centrally, or through distance learning. Study must result in the cost-effective achievement of a nationally recognised Level 3 (or above (with GED programs being the exception)) qualification.

20. **Study meriting ELC support.**

- a. **GED.** Completion of a high school equivalency diploma such as a GED.
- b. **Study towards first degrees,** including Foundation Degrees.
- c. **Study towards postgraduate qualifications,** including teacher training.
- d. **Other academic study,** such as AS/A level study, Higher Educational Institute (HEI) access courses, or foreign language study.
- e. **Professional self-development,** in addition to that provided in-Service training.

- f. **Accreditation of prior learning assessment fees**, including accreditation of Service professional skills, leading to partial or complete qualifications providing there is evidence that the SP has produced new, original work.
- g. **Vocational courses**, providing there is direct benefit to the Service.
- h. **Examination fees**, for qualifications that meet the ELC eligibility criteria.
- i. **Initial registration fees and accreditation fees** for professional bodies and institutes expressly to gain qualifications (such as certificates, diplomas or equivalent schemes of work rather than categories of membership).
- j. **Refresher training**, provided that training results in the re-qualification or reward.
- k. **Courses and qualifications which are required for the coaching and management of sport or Adventurous Training (AT)**. There must be evidence of intellectual development.
- l. Some LP may offer discounts for certain qualifying courses to SP. SP should ensure any such discounts are fully taken into account in calculating the course fee and their personal contribution before submitting their claim.

21. **Where learning credits may not be claimed:**

- a. **Service training.** General Service training, courses or qualification ordinarily undertaken for the benefit of the Regiment. These activities will ordinarily be funded through the training budget.
- b. **Professional bodies and institutes.** Annual membership fees for institutes or professional bodies.
- c. **Course material.** Course material, for which there are additional charges.
- d. **Pure sport and AT.** All sporting and AT, or courses where the aim is solely to learn the sport or activity, or improve by undertaking that sport or activity.
- e. **Battlefield tours.**
- f. **Authority for travel.** There is no entitlement to travel at public expense for learning credit funded training purposes.

MAKING A SLC CLAIM

22. **Making an application.** Before embarking on a SLC funded course, SP must complete the Learning Credit Application Form (at Annex A) and ensure it is signed by the RCMO and Line Manager. Without this SP will be ineligible for a refund.

23. **Submitting a claim.** The SLC claim submission process is:
- a. **Courses up to 12 months.** The refund payment is to be made on completion of the course. Only one payment may be made per course, even if it begins and ends in different FYs. The payment is normally to be made in the FY in which the course is completed.
 - b. **Courses exceeding 12 months.** For courses lasting longer than 12 months, the refund payment may be paid at the end of each study year, on production of evidence of satisfactory attendance for that period. Further claims may be made at annual intervals, and on completion, normally subject to a maximum of three refunds for any one course of study.
24. **Refund payments.** The SLC refund payment procedure is:
- a. **Payment of refunds.** Upon successful completion of a course of study, the SP will submit to the RCMO confirmation of the successful completion of the course of study as well as receipts confirming course payment. The RCMO will then submit a refund request to the RAO.
 - b. **Discharge.** Accounts should be settled before discharge. Refunds will not be processed after a SP has been discharged.

MAKING AN ELC CLAIM

25. **Making a claim.** Before applying, and having discussed their needs with the RCMO and Chain of Command, SP must consider the eligibility criteria and the purposes for which ELC funding can be provided. The SP should also consider the time it will take to process an ELC claim. Claims should be submitted no later than six weeks prior to the commencement of study.
26. **Admissibility of proposed study / course.** For SP, RCMO will provide advice as to whether or not a proposed course qualifies as appropriate use of ELC. Where required the SP is responsible for providing proof that the qualification is at Level 3 or above (or equivalent).
27. **Supporting Documentation.** Claimants are to complete the Learning Credit Application form at Annex A. With this form they are to provide the following supporting documentation:
- a. Details of the course of study.
 - b. Confirmation that they meet the prerequisites for commencing the course of study.
 - c. A letter of recommendation from their Coy Cdr indicating their support.
 - d. A signed ELC Agreement (located at Annex B).
 - e. Any supporting information.

28. **Review of ELC Claims.** ELC claims are to be reviewed by a board of three officers – to include the RCMO. ELC claims will be reviewed no less than on a quarterly basis and must be submitted to the RCMO before:
- a. **1 Apr**
 - b. **1 Jul**
 - c. **1 Oct**
 - d. **1 Jan**
29. **Importance of completion.** First applications for ELC funding will take account of the likelihood of completing the proposed course of study. The RCMO will assess this through interviews and any supporting evidence. Should a SP subsequently fail to complete a course, non-completion will inform the decision as to whether to approve future claims.
30. **Payment.** The ELC payment procedure is:
- a. **Payment.** Once a request for ELC funding has been approved by the RCMO, the RCMO will submit a payment request to the RAO.
 - b. **Validation and Liability.** Upon completion of the Course, or no later than 12 months after the provision of ELC funding the SP shall produce evidence of the successful completion of the course of study. SP's in receipt of ELC funding who fail to complete a course of study will be liable for the repayment of the grant.
 - c. **Discharge.** Applications for ELC funding will not be accepted after a SP has been discharged.
31. **Cancellation or Suspension.** A SP may request to cancel their ELC support for operational or compassionate reasons at the CO's discretion. If approved they will not be liable for funds paid, however, they will not be reimbursed by the Regiment for their personal contribution.
32. **Amendment.** SP seeking to amend their submitted application under certain operational and compassionate circumstances, SP may be able to arrange with their LP to extend the duration of their course dates, in order to complete their qualification.
33. **Service quality assurance process.** On completion of a course, SP will be required to evaluate their learning by completing Learning Credit survey.
34. **Second and Third Claims.** Claims will not be approved without receipt of the required documentation. For SP see Para 27.
35. **Authority for travel and subsistence.** When pursuing learning credit studies, there is no entitlement to travel at public expense, or to claim subsistence allowance.

FUNDING OF LEARNING CREDIT PROGRAMME

36. **Budget.** The RBR Learning Credit Programmes are funded out of the Local Training budget. For the 2021-2022 budget year this is set at \$60,000. If the budget is exhausted before the FY end, the scheme may be topped up with funds from other cost centres, however, this is not guaranteed.
37. **Award Funding Allocation.** Funding will be allocated on a first come, first served basis.
38. **Retroactive Payments.** If a learning purpose is approved before the commencement of learning, but funding is not available, retroactive payment may be made after learning has commenced only if the Learning Credit Fund is topped up at the end of the FY. Retroactive payment cannot be made with funds from a different financial year than that in which the learning took place.
39. **Upgrading of lower tier ELC awards to upper tier awards.** If there is a projected underspend of the allocated budget, lower tier ELC awards may be upgraded to upper tier ELC awards if warranted.

Annexes:

- A. Application for Learning Credit Funding
- B. Extended Learning Credit Recipient Agreement

**ANNEX A TO
SO 53
DATED MAR 21**

APPLICATION FOR LEARNING CREDIT FUNDING

Support requested (* Delete as appropriate):

- * Standard Learning Credit (max \$250 - all service personnel eligible)
- * Enhanced Learning Credit - Lower Tier (max \$1000 - three years service required)
- * Enhanced Learning Credit - Upper Tier (max \$2000 - six years service required)

Part 1: Personal details (please use block capitals)

Regimental Number:	Rank:
Surname:	Forename:
Address:	
Tel:	Email:
Coy:	Sub Unit:
Service Start Date:	Years Served to Date:

Part 2: Course details

Course Title:	
Qualification Gained:	Awarding Body:
Name of Learning Provider:	
Address of Learning Provider:	
Level of Qualification:	
Start Date:	End Date:
Total Cost of Course \$:	SLC Amount \$:
Applicant Contribution (min 20%) \$:	Method of Study:

Part 3: Reason for study / previous course details

Details of previous study/courses relevant to this application:

Reason for study:

What benefit will this course bring to the service?

Part 4: Undertaking by Applicant

I have read the relevant policy. This learning activity forms part of my Personal Development Plan. I agree to inform the relevant Ed Staff of any changes in circumstances that may affect my ability to complete my course of study.

Applicant Signature:

Date:

Part 5: Action by Applicant's Line Manager

I have noted the details of the course at Part 2 and I **approve / do not approve** this application to study.

Name:	Signature:
Date:	Contact Tel:

Part 6: Action by the RCMO

* I have consulted the applicant and confirm that this course is eligible for SLC funding in accordance with the relevant policy.

* I have consulted the applicant and informed them that this course is ineligible for SLC funding.

* Delete as appropriate.

RCMO Name:	Contact Details:
RCMO Signature:	Date:

Explanatory Notes (RCMO use only):

Revision: 18 March 2021

**ANNEX B TO
SO 53
DATED MAR 21**

EXTENDED LEARNING CREDIT RECIPIENT AGREEMENT