



European Medicines Agency

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IMPLEMENTING RULES REGARDING TRAINING FOR EMA STAFF

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Implementing rules regarding training for EMEA staff

THE EXECUTIVE DIRECTOR

HAVING REGARD to Article 66 (h) and 74 of the Council Regulation no 726/2004 of 31 March 2004,

HAVING REGARD to Articles 11 and 81 of the Conditions of employment of other servants of the European Communities,

HAVING REGARD to the draft decision of the Management Board relating to further training of EMEA staff,

HAVING REGARD to the opinion of the Staff Committee,

WHEREAS training is important for staff at the Agency,

WHEREAS there is a need for training that caters for the needs of the Agency by supporting competence development of its staff. As a consequence, training that is part of a training profile should take priority over any other consideration of competence development.

WHEREAS it is necessary to draw up rules for reimbursement of costs incurred by training courses undertaken by EMEA staff in their own time,

HAS ADOPTED these detailed rules.

Admission to training courses

Article 1 - Applications to attend training courses

1. Applications for all training courses shall be made on the form "Staff training – application" available in Annex 1 of this document and on the server (Word/file/new/ADM). All training applications shall include full details of the course/conference programme together with cost, dates, times and any possible requirements for travel. If travel is required, the relevant section of the application form has to be filled in.
2. All applications must be approved by the staff member's Head of Sector and Head of Unit or in the case of the Directorate by the Executive Director before submission to Human Resources for assessment and final approval (budgetary and technical feasibility, contractual requirements etc.).
3. Applications must reach Human Resources **at least one month** before the final enrolment date for courses.

Article 2 - Criteria for assessing applications and eligibility for training courses

1. Applications shall be reviewed on the basis of the following criteria:

- value of the training to the Sector, Unit and the Agency;
- relevance to the staff member's job
- staff category:
Temporary agents, contract agents and national experts on secondment may attend all types of training courses.
Interims and Trainees may attend Introduction and Technical Training, EDMS, Microsoft Office courses (if applicable), job-relevant database training (if applicable).
- content of the staff member's training profile
- value of the training to the staff member;
- special admission requirements, cost (including travel expenses) and
- compliance with the deadline for submitting applications.

2. Unless there are special reasons, an application shall be rejected if the applicant has already attended an identical or equivalent course.

3. Applications may be rejected for external training courses if equivalent courses are arranged by the Agency after having consulted the Head of Unit on the content of alternative courses.

4. Only courses designed to ensure the acquisition, improvement or updating of competencies, occupational skills or to promote career development shall be considered as training courses.

Article 3 – Enrolment

1. For training courses arranged by the EMEA and published internally, the enrolment will be completed by Human Resources. These courses are paid from the general training budget under item 1120.

2. Language courses offered in-house. EMEA organizes language courses each academic year in certain languages. The minimum number of applicants for a level to be organized is five. EMEA staff can follow in-house only one language course in an academic year.

3. For **individual** training courses, i.e. conference participation, specific IT courses, language courses outside EMEA, long-term training, the application shall be completed by Human Resources (creation of purchase order) in conjunction with the staff member (course registration after confirmation by Human Resources that a purchase order has been issued). For more details, see the workflow in Annex 2. These courses are paid from the relevant unit allocation under item 1120.

4. In all cases enrolment is subject to Human Resources approval (regarding budget availability, consistency of access to training) and Human Resources will confirm the approval to the staff member once the funds for the training have been reserved.

Article 4 - Appeals against rejection

1. Any application refused must be substantiated and the staff member must be informed in writing of the grounds for the refusal.
2. Where a request is refused the staff member may appeal to the Executive Director who will take the final decision in time for the applicant to be able to attend the course in question. A copy of the appeal must be sent to the Head of Unit and the Heads of Human Resources and Administration.
3. The applicant and all those consulted on the application shall be informed of the Executive Director's decision.
4. These provisions shall not replace the appeal procedures provided for under the Staff Regulations of Officials and the Conditions of Employment of Other Servants.

Training Record

Article 5 - Individual training record

Participation in a training course shall be noted on the staff member's training record. A staff member may request a certificate gained to be filed in his/her personal file.

Contribution towards costs

Article 6 - Courses in the interest of the service, organised by Human Resources or by Human Resources in conjunction with the staff member

⇒ APPLICABLE TO ALL COURSES PUBLISHED IN THE TRAINING CATALOGUE AND SHORT-TERM INDIVIDUAL COURSES PAID FROM THE RELEVANT UNIT ALLOCATION (E.G. CONFERENCES) EXCEPT INTENSIVE LANGUAGE COURSES

1. Subject to the availability of funds, course enrolment, inscription, registration, travel expenses and other expenses for courses shall be paid if the training is in direct relationship to the scope of activities of the staff member at the time when the training request is made.
2. Applications shall be made on the form "Staff training – application" including full details of the course/conference programme together with cost, dates, times and any possible requirements for travel. If travel is required, the relevant section of the application form has to be filled in. All travel should be made in standard class (see Article 8).
3. All university courses longer than two weeks follow the provisions under Article 7.

Article 7 - Courses of shared interest between the staff member and EMEA

⇒ APPLICABLE TO ALL LANGUAGE COURSES IN ANY EU LANGUAGE AND LONG-TERM (i.e. minimum of two weeks) UNIVERSITY COURSES OR OTHER COURSES WHICH CONSTITUTE A SHARED INTEREST BETWEEN THE STAFF MEMBER AND THE AGENCY.

1. Subject to the availability of funds, EMEA may grant a contribution towards courses that are of shared interest between the staff member and the Agency. All courses must relate to the job that the staff member is occupying at the time when the application is made. The form "Staff training – application" has to be handed in before the beginning of the course or before each academic/calendar year including full details of the course programme together with course cost and date. The number of special leave days requested for the chosen period has to be indicated (see Article 10 on Leave).
2. The staff member will only be reimbursed after the course or the academic/calendar year upon production of the passed examinations (or certificate of attendance should there be no examination) related to the relevant year.
3. Language courses.
 - 1) staff member who has to comply with the third language requirement (Staff Regulation Art 45.2) participating at extensive courses in London outside EMEA working hours is entitled to 100% course fee reimbursement up to € 1200 per year; at intensive courses in London or abroad is entitled to receive 80% reimbursement (maximum € 1200 per year) for up to four courses during his/her career in the language declared as the third language.
 - 2) staff member who participates at language courses in any other official EU language than his/her second or third language may receive 100% reimbursement of the course fee up to € 1200 per year for extensive courses if the language course is not offered in-house, and 60% reimbursement up to € 1200 per year twice during his/her career for participating in intensive courses in London or abroad.
4. University courses or other courses of shared interest.

EMEA pays to the staff member a contribution of 60% of the course cost up to the maximum reimbursement per year which is € 1200. EMEA reserves the right to revise this ceiling.
5. No payment will be made towards travel or accommodation.
6. The Agency's contribution shall be paid in Pounds Sterling into the same account in which the staff member's salary is paid according to the monthly conversion rate.
7. No partial refunds are made during the academic year. Reimbursement of the course/academic year is made upon evidence of course payment and successful course completion (original receipted bill or invoice stating all the relevant elements of the course, confirmation of passed examination). The original attendance certificate will be returned to the staff member if so requested. In case of applying for 100% language course reimbursement, the staff member must provide proof from the provider stating course attendance being above 60%.
8. Should a university course be split into modules instead of academic years, the university has to provide written evidence about how many modules correspond to one academic year. The staff member can then be reimbursed upon production of the passed examinations of the relevant academic year.

9. In exceptional cases and duly justified by the Head of Unit, courses that are primarily in the interest of the staff member are eligible for reimbursement of 50% up to a maximum of € 500 per year.

Article 8 – Short-term training involving travel

If the training takes place outside London (> 50km), the relevant section on the training application form has to be completed. Portman Travel must be informed upon booking that it is a training mission. A quote from the travel agency has to be attached to the application form. The template for this quote is available on the Mission website on EMEA PLUS.

Staff attending training courses involving travel is reimbursed according to the relevant mission rules.

Special training leave

Article 9 - Leave to attend a course in the interest of the service (as specified in Article 6)

Time spent attending a training course in the interest of the service shall be considered working time and shall not require special leave.

Article 10 - Leave to attend a course of shared interest between the staff member and EMEA (as specified in Article 7)

The Agency may grant special leave, if required, for courses which constitute a shared interest between the staff member and the Agency, in accordance with the following provisions:

1. Language courses attended during working time

For languages courses lasting not more than twenty working days, special leave of up to ten working days per year shall be granted on the following terms:

- unless an exception is made in duly substantiated cases, courses must relate to an official Community language and must be designed to improve an existing knowledge of the language.
- such courses may not be attended by staff who have no knowledge of the language in question and the relevance of the course to the work of the applicant must be attested by the relevant Head of Unit or the Executive Director (except for those who have to comply with third language requirement, Staff Regulation Art 45.2. In such cases, beginner level is also accepted for granting special leave);
- courses must be approved by Human Resources and must be at a level appropriate to the needs of the applicant;
- the courses must involve at least four hours' tuition per working day for at least five days a week and last at least two weeks;
- **unless special reasons are put forward by the Unit concerned only one period of special training**

leave shall be granted for any one language during a staff member's career at the EMEA. If a staff member has to comply with third language requirement (Staff Regulation Art 45.2) special leave may be granted twice during career.

Where the above conditions are met, special leave shall be granted for half the total duration of the course, the other half counting as annual leave.

2. Language courses attended in London outside working time

Time recuperation is only granted for courses in staff member's second and third language. Half of the time spent for courses attended in London outside working time can be recuperated up to a limit of ten working days per year.

3. Training courses of shared interest between the staff member and EMEA other than language courses attended during working time

For training courses (other than language courses) lasting not more than twenty working days, special leave of up to ten working days per year shall be granted for half the total duration of the course. The other half counts as annual leave.

4. Courses of shared interest between the staff member and EMEA spread over one or more years or through distance learning outside normal working hours

Provided that they meet the admission requirements for the following year and have passed the examination, staff members attending an authorized training course spread over one or more years or through distance learning, e-learning, or correspondence and provided that the course is of reasonable relevance to the staff member's current function, may be granted special leave for half the number of hours' tuition up to a maximum of ten working days (or the equivalent number of hours) per academic or calendar year.

Leave for examinations (oral and written exams incl. thesis) is not included in the maximum of ten days special leave per year.

At the end of the training course/academic year, the staff member must provide Human Resources with a certificate from the training body concerned confirming the number of hours of attendance at the course as well as with a confirmation of the passed exam.

For each year, a new application with confirmation of having passed the exam has to be submitted to Human Resources at least one month prior to the start of the course.

In exceptional cases, special leave for study and exams may be granted to staff attending courses of shared interest between the staff member and the EMEA without reimbursement of training cost by the EMEA. In this case a form "Staff training – application" including full details of the course/conference programme, course dates indicating the number of special leave days has to be submitted to Human Resources signed by the Head of Sector and Head of Unit.

Article 11 - Leave for examinations

In addition to the periods provided for in Article 10 and provided the courses comply with the criteria laid down in Article 2 staff shall be entitled to special examination leave of up to ten working days per year for the number of days they are required to be present at the examination plus any traveling time needed unless the journey can be undertaken at a weekend or on a public holiday (see the rules on leave).

Written proof from the university has to be submitted stating date and time of the exams in addition to the leave form.

Article 12 – Special leave entitlement for staff working part-time

Staff working part-time are granted special leave for training courses of shared interest as defined in Article 7.

Article 13 - Submission of applications and recording of special leave

1. Applications for special training leave to attend courses or to sit for examinations shall be made on the usual leave form accompanied by the relevant documents, e.g. invitation letter for the examination, confirmation of seminars. These applications must specify the places, dates and times of the courses or examinations. Applications must be forwarded to the leave administrator of the relevant unit.

2. Special leave shall not be finally granted until the applicant has submitted within two months of the end of the course an original document or certified copy to Human Resources showing that the courses have actually been attended and that the examinations have actually been passed. Failing this, the period of absence shall count as annual leave.

Article 14 - Appeals against refusal of leave

Should special training leave be refused, the member of staff concerned may have recourse to the same appeal procedures as laid down in Article 4.

Special Provisions

Article 15- Failure to attend a course after enrolment

Once the Head of Sector and Head of Unit of the staff member have approved an application, attendance to the course is mandatory. A member of staff who has enrolled for a training course but is unable to attend must immediately inform Human Resources.

Cancellation will be accepted for a limited number of reasons and a specific form will need to be filled in providing a full explanation of the imperative reasons why it was not possible to attend. This form has to be forwarded to Administration.

Article 16 - Objectives and evaluation of courses

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In advance of any training course, the staff member together with the manager shall agree on the objectives to be attained from the course. These objectives shall be included in the training application.

After completing a training course, the staff member shall submit an evaluation form to Human Resources within a week.

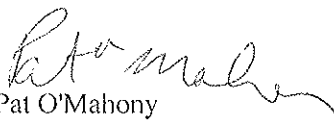
Six months after the training, the staff member's supervisor/manager can be asked to give feedback on the impact of the staff member's training in relation to the objectives stated upon application. Human Resources will send out an evaluation form to the relevant supervisor/manager.

Final Provisions

Article 17 - Power of decision

The Executive Director shall exercise the power to take decisions on all matters concerning training. With the exception of decisions relating to appeals lodged against rejections of applications, the Executive Director delegates this power to the Head of Administration. Questions of leave relating to training shall be a matter for Human Resources.

These rules take effect from 11 December 2009.



Pat O'Mahony
Chairman of the Management Board

SUMMARY CHART

SPECIAL TRAINING LEAVE FOR PARTICIPATION IN COURSES OF SHARED INTEREST BETWEEN THE STAFF MEMBER AND THE EMEA AND/OR EXAMINATIONS RELATED TO THESE COURSES

The chart below sets out special training leave given where the conditions for participation have been fulfilled.

The figures given outline the entitlements for leave and exams and indicate the maximum number of days, or their equivalent in hours, which can be granted. Where there is no indication to the contrary, the leave granted within these limits is for half the total length of the training concerned, the other half being deducted from the candidate's annual leave allowance.

Type of training	Special leave entitlements
Language courses	
<u>Intensive language courses in second or third language in London or abroad during working time</u> (at least four hours' tuition per working day for at least five days a week for a minimum of two weeks and a maximum of four weeks)	Half of the course duration (the other half is annual leave) up to a maximum of 10 days, twice during career
<u>Extensive language courses in second or third language in London outside working hours</u>	Half of the course duration (the other half is annual leave) up to a maximum of 10 days
<u>Intensive language courses other than second or third language in London or abroad outside working time</u>	Half of the total duration to be recuperated up to a limit of 10 days per year, once during career
<u>Extensive language courses other than second or third language in London outside working hours</u>	No special leave granted
Other courses attended during working time (as specified in Art.7)	Half of the course duration (the other half is annual leave) up to a maximum of 10 days
Training courses spread over several years and of shared interest between the staff member and EMEA	Half of the course duration (the other half is annual leave) up to a maximum of 10 days
Participation in examinations	Maximum of 10 exam days per year



European Medicines Agency

ANNEX 1

APPLICATION TO ATTEND A TRAINING COURSE

1. PERSONAL DETAILS

Last Name:

First Name:

Select an option

Unit/Sector:

Cat/Grade:

Personnel number:

2. TRAINING TO BE PAID FROM TELEMATICS FUND ☐

3. TRAINING ORGANISED BY THE EMEA

Title of course:

Date and place:

4. ALL OTHER TRAINING

Title of course:

Date of the course:

Duration of the course:

Name and address of the organisation:

Alternative date:

Place of the course:

Enrolment fee:

Special training leave requested (days):

A programme has to be attached stating the course title, the course description, the organiser, the course fee and the course venue.

5. OBJECTIVES OF THE TRAINING IN RELATION TO THE CURRENT POSITION (State the work-related objectives to be attained from this training course, max. 3-4 objectives):

6. COMPETENCES TO BE DEVELOPED:

PLEASE FILL IN THE NEXT SECTION OF THIS FORM IF YOU ARE GOING TO ATTEND TRAINING OUTSIDE LONDON (> 50 KM), otherwise go to section 8.

7. Training involving travel:

Place of training:

Duration of training (number of days):

Training start and end time:

Departure

Place:

Date:

Time:

Return

Place:

Date:

Time:

Means of transport used (only economy class):

Are any costs covered by the organisation inviting you? Please specify by ticking the relevant boxes below.

Please note you will need to claim reimbursement for these costs from the organiser directly and any payments or reimbursement by the EMEA will be reduced accordingly.

Transport ☐

Meals ☐

Accommodation ☐

Daily Allowance ☐

Is the Training combined with
leave, weekend or private
arrangements?

NO ☐

YES ☐

From

To

(if yes, attach copy of leave form + quote from Portman Travel -
we will reimburse the cheaper option. Remember you must
book and pay privately)

If leave is for more than three days, tick box ☐

Head of Unit/Executive Director signature is required:

Please note that any anticipated costs that are not covered by the Reimbursement rules based on the Mission Guide need a special authorisation by the Head of Unit/Executive Director with a memo to the Training Office.

8. Should my application be accepted, I undertake to attend the whole course.

Date:

Signature: _____

OPINION OF HEAD OF SECTOR

Compatibility of the course with the proper functioning of the service and relevance of the training to the staff member's current position

☐ compatible

☐ not compatible

Date:

Signature: _____

Comments:

OPINION OF HEAD OF UNIT

Training in the interest of the service

☐ yes

☐ no

☐ shared

Date:

Signature: _____

Comments:

FOR ADMINISTRATION: According to Art. 3.3 of the Training rules, Training is

☐ granted

☐ not granted

Date:

Signature: _____

Reason/Comments:

INTERNAL WORKFLOW FOR INDIVIDUAL TRAINING COURSES

Training competencies need to be identified at the probation and performance evaluation review or from the Training profile.

Course is identified by the manager together with the staff member/or proposed by the manager/or proposed by the staff member and the manager



Application form with course documentation is agreed to by the Head of Sector and Head of Unit and sent to Human Resources for review and final approval; staff member notes absence in Outlook calendar or for work planning purposes.



Training application arrives in Human Resources **at least one month in advance of the course registration.**



Human Resources assess the training according to the criteria in Art.2 and checks availability of funding.



Human Resources give feedback to staff member if the training is approved.



ONLY after confirmation by Human Resources and the financial commitment can the staff member book the course.

The staff member is responsible for the registration with the training provider.



TRAINING TAKES PLACE



After the training, the invoice has to be forwarded to Human Resources who arrange payment and a training evaluation form has to be sent to Human Resources.



Six months after the training, the staff member's supervisor/manager can be asked to give feedback on the impact of the staff member's training in relation to the objectives stated upon application. Human Resources will send out an evaluation form to the relevant supervisor/manager.



EVALUATION FORM - TRAINING COURSE

1. Title of course:
2. Date and place of course:
3. Name and address of training organisation:
4. Agreed competencies to be developed/ enhanced at the outset of the course:

6. How useful did you find the course, taking into account your expectations?

Comments

- Very useful ☐
- Reasonably useful ☐
- Not useful ☐ please specify

7. Where any competence requirements as identified not covered?

Comments

- Yes ☐
- No ☐

8. In your opinion did the different elements of the course give:

Comments

- | | Detail | Time |
|------------|--------------------------|--------------------------|
| Too little | <input type="checkbox"/> | <input type="checkbox"/> |
| Adequate | <input type="checkbox"/> | <input type="checkbox"/> |
| Too much | <input type="checkbox"/> | <input type="checkbox"/> |

9. For which element would you like to have had extra details/time?

10. How useful was the training material that was distributed?

Comments

Very useful ☐

Reasonably useful ☐

Not useful ☐

Too much detail ☐

Too little detail ☐

11. Do you think the training material could be improved?

Yes ☐ please specify

No ☐

12. How efficient was the trainer?

Very efficient ☐

Reasonably efficient ☐

Not efficient ☐ please specify

13. If the course took place outside the EMEA, please rate the quality of the venue:

	Very good	good	acceptable	bad
Room	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reception	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Food & drink	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

14. What were the most positive aspects of the course?

15. What were the most negative aspects of the course?

16. Would you recommend the course to other colleagues?

Yes ☐

No ☐

Why?

Name (optional) :

Date:



European Medicines Agency
Administration

Implementing rules regarding training for EMEA staff

SUMMARY OF REVISIONS

Article 3 – Enrolment

EMEA offers in-house language courses in French, German, Spanish, Italian and English at all levels. Staff can follow one language at a time.

Article 7 - Courses of shared interest between the staff member and EMEA

There is a new point on language courses (point 3). Main changes:

- more support for third language studies - 100% financial contribution for evening courses in London; 80% reimbursement for intensive courses for up to 4 courses during career
- more support for additional languages - 100% financial support if the language course is not offered in-house and 60% financial support for intensive courses twice during career
- The required minimum attendance rate is 60% in case of 100% financial contribution

Article 8 – Short-term training involving travel

Staff on long-haul travel (more than 4 hours) can travel on business class; same rules apply as travelling on mission.

Article 10 – Special leave for training of shared interest

10.1. Language courses attended during working time: special leave may be granted for language course at beginner level if it is to achieve compliance with Art 45.2. This special leave may be granted twice during career.

10.2. Language courses attended in London outside working time. Time recuperation is offered for second and third languages.

Summary chart: Language courses are updated in the overview with the relevant special leave entitlements.