

Mandatory learning policy

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Why we have this policy.

Keeping people safe while attending, visiting or working at the NHS is essential. This policy sets out how mandated learning helps people develop and retain the necessary knowledge, skills, behaviours and routines (collectively referred to throughout as competencies) to work safely and reduce risks to themselves, colleagues and patients.

Some learning is required in legislation and regulations. All mandated learning forms the foundation of developing essential competencies.

This policy will help ensure organisations meet their statutory obligation to ensure a safe and inclusive work environment. It is intended to reduce or prevent incidents, near misses, risks and connected loss of productivity. It also aims to increase efficiency by ensuring learners do not need to repeat learning unnecessarily.

This policy will help employees and managers to understand their responsibilities and, working with local trade unions and learning representatives, ensure that everyone can obtain the necessary competencies to work safely and deliver safe, high-quality patient care.

Who this policy is for?

This policy applies to all employees on permanent and fixed-term contracts, as well as bank workers. It will apply to individuals on agenda for change, senior management, and medical and dental contracts.

It will also apply to individuals who the organisation does not employ but that work within the NHS. This includes honorary contracts, secondments, students, volunteers and individuals completing work experience, non-executive directors, as well as agency workers, locum doctors and those contracted to work within the NHS through third-party contracts.

This policy also applies to all people managers as they have an important role in ensuring a safe environment and competent workforce.

What this policy covers

Section 1 of this policy sets out why and how learners should demonstrate competencies, how they will be trained, and how competencies will be regularly assessed or updated if needed.

It provides guidance to ensure everyone understands:

- their responsibilities to ensure mandatory learning is completed and competencies are demonstrated
- how to find out about role specific requirements, including how often they will be assessed
- how feedback is collected and used
- the support learners can expect to receive to demonstrate their competency
- what happens if the competency is not demonstrated in line with the requirements

Section 2 provides information for managers about their responsibilities and how they should manage mandatory learning.

This policy includes guidance for organisational leaders and those overseeing what is mandated and how it is managed.

How this policy promotes a compassionate, inclusive and accountable culture

Everybody should feel safe while visiting or working at Leicestershire Partnership NHS Trust

This policy sets out our commitment that everyone working here must have essential competencies, including those required by law, that help everyone remain safe.

The focus is on using methods that are accessible and can adapt to meet the needs of every learner, avoiding unnecessary repetition.

How we know this policy treats people fairly

An Equality and Health Impact Assessment (EHIA) is included with this policy to ensure everyone is treated fairly and that the policy does not disadvantage anyone or discriminate against any protected group(s).

Policies are reviewed regularly to see how they are performing, which includes listening to colleagues' views and regularly reviewing information about how the policy works in practice (see appendix 3).

Terms used in this policy

“Harm and risks of harm”

In NHS organisations, there are many risks of harm, and it’s important that we do everything possible to minimise adverse incidents.

This policy aims to help minimise these incidents and risks by ensuring our workforce is safe and competent through learning and competency assessments. There are many other ways that harm and risks of harm can also be reduced. However, these sit outside the scope of this policy.

“Learning” and “competencies”

The focus of this policy is on learning. This will cover formal learning events (for example, completion of e-learning modules) but also other experiences that will support people to have the right knowledge, skills, behaviours and routines to ensure safety – collectively referred to as competencies.

It's important that all individuals spend time learning and developing. Mandatory learning forms the foundation for developing essential competencies that will help keep everyone safe.

It’s also vital to keep competencies up to date, as they are not just a one-time requirement but part of an ongoing learning process. Regular learning and updates ensure that skills and knowledge remain relevant and aligned with current standards and best practices.

“Learner”

This term is used to describe everyone who needs to undertake mandatory learning.

“Mandatory learning oversight group”

This is a senior multidisciplinary group at each NHS organisation that will oversee the delivery and effectiveness of this policy. They will determine which topics are locally mandated, in addition to those set nationally, and create a local annual plan, involving trade unions to ensure that the investment of employee time delivers maximum improvement in outcomes.

In LPT the Training Education and Development Group (TED) acts as the Trusts mandatory learning oversight group (MLOG) and includes the Terms of Reference set out by NHS England for an MLOG.

Section 1: Information for learners



What is mandatory learning?

Mandatory learning is primarily about ensuring all those working, learning and volunteering in the NHS can ensure a safe working environment for themselves, colleagues, patients and the public. This includes knowing what to do in the event of an emergency.

Mandatory topics can be grouped under 3 headings.

Nationally mandated – This covers areas defined in national policies and legislation that are essential to organisations meeting their statutory obligations. Examples include fire, health and safety, and infection, prevention and control.

NHS England (or the successor organisation) reviews nationally mandated learning every year and its effectiveness is reviewed by the organisation’s mandatory learning oversight group.

Locally mandated– Each NHS organisation will define what they consider is essential for multiple staff groups and professions based on local risk and care requirements. These are intended to meet local needs, in addition to what has been nationally mandated.

In LPT locally mandated training is described and also known as **Role Essential** training. Learners have role essential training identified according to their job role and responsibilities.

Required by role – Each staff group and profession has knowledge, skills and behaviours that their professional body considers essential to their roles within the profession they regulate. Unregulated roles may also require certain learning to be completed.

This policy does not cover **role specific** requirements, and therefore

all reference to “competencies” in this guide refers to ones that are nationally and locally mandated.

Responsibilities of all learners

Every role in the organisation is assigned a set of nationally and locally mandated (role essential) competencies. You will need to be competent in the topics defined for your role(s) and **MUST** complete your mandatory learning as instructed.

Mandatory learning and the importance of developing and updating competencies will be discussed regularly at team meetings and at 1 to 1s (managerial supervision) to ensure you understand what is needed and where to access support.

You will need to:

- know what mandatory competencies you need to demonstrate for all your roles and by when. This information is available from your local learning record, which can be accessed from uLearn.
- check your learning record for changes in requirements that are made from time to time
- demonstrate mandatory competencies by, for example, completing a self-declaration, online or practical assessment or drill as required
- complete new mandatory learning as required or, if you have failed an assessment, by a specified date
- speak to your manager if you think your learning record is incorrect and requires updating or amending (appendix 4).

Joining the NHS or new to a role

You are required to complete the mandated learning for your role. This includes keeping your competencies up to date over time. This is required in your employment contract and, if applicable, as part of your professional registration.

If you have more than 1 role, you must demonstrate you meet the requirements for each role.

If your mandatory learning has been completed and your competencies successfully assessed at a previous NHS England organisation, the record can be transferred to the new organisation. This can be done automatically during recruitment or by presenting valid certificates of completion or competence.

LPT accepts training from NHS England organisations. Other education providers may offer similar training but are unable to be accepted as equivalent.

In line with national guidance, you will not be required to re-assess competencies or repeat mandated learning until they expire.

However, you will need to:

- know what mandatory competencies are required for all your roles and the frequency of reassessments
- complete both the nationally and locally mandated (role essential) learning modules either when you start or within 4 weeks.

- pass assessments that confirm you have gained the knowledge and skills for you to be considered competent
- complete local orientation and induction to ensure that you are familiar with your new environment and local policies and practices

Accessing learning and assessments

You will be provided access to your learning record, which is held in your personal account on uLearn. **It is your responsibility to ensure that your mandatory competencies are always up to date.**

Completing learning or assessments

Mandatory learning and assessments will be delivered using various methods, including:

- online e-learning modules and e-assessments
- in-person/classroom workshops, seminars and practical assessments
- virtual learning sessions
- practice drills and simulations
- blended learning approaches

Getting help and support

Employees and bank workers should be given protected work time to complete mandatory learning and assessments.

While operational demands may sometimes need to be balanced with undertaking mandatory learning, keeping these essential competencies up to date is important.

Wherever possible, your manager (supervisor for medics) will aim to manage workloads so that you can complete mandatory learning before any deadlines and will support you in meeting the required competencies.

If you need support or reasonable adjustments to complete mandatory learning, you should discuss this with your manager, or a member of the HR team, or learning and development service.

Bespoke learning information and delivery methods may be required in certain circumstances for different staff groups or settings. If you feel that the learning content is not relevant to your setting or role, you should discuss with your manager who may discuss any adjustments required with the relevant subject matter expert and support a request for an exemption to be made.

Agreements about this should be documented in your health passport.

Learner experience and feedback

You may be asked to provide feedback after completing mandatory learning or an assessment. This could include how learning content or assessments could be improved or made more accessible. It's important to complete this to ensure future learning and assessments can be improved.

Relevance

It's important that mandatory learning is relevant to your role. If you believe that your type of role does not require a particular topic that you have been asked to complete, you should speak to your manager to request an exception. However, please note an exception is not guaranteed and will be monitored by the local mandatory learning oversight group .

Freedom to speak up

Everyone is encouraged to speak up if they are aware of unsafe environments or risks of harm that are not being addressed. If you believe the mandated learning and competency assessments do not address a harm or a risk of harm, you should feedback concerns by raising with your manager, head of service, professional lead or learning and development service.

Absence

If you are absent from work due to sickness, maternity, paternity or other reasons, you will be expected to complete any expired mandatory learning within 4 weeks of returning to work (appendix 5).

Support will be provided when returning from extended periods away from work, which may include an agreement to complete mandatory learning during keeping in touch (KIT) days or as part of your return to work plan.

If you have not demonstrated your required competencies

Mandatory learning is designed to ensure a safe working environment for all is maintained. Not completing learning or updating your competencies will be taken seriously by your organisation. Every reasonable effort should be taken to ensure you keep your competencies up to date.

If you are having trouble completing your competencies, you should speak to your manager/Head of Service or learning and development especially if you require additional support or an extension.

When your manager becomes aware that your mandatory competencies are not up to date, you can expect them to discuss with you:

- why it has not been done, whether the reason is beyond your control and if you have made every reasonable effort to complete it (including reasonable adjustments).
- any support you require
- appropriate actions to ensure you have demonstrated your required competencies as soon as possible

If relevant, they will also discuss:

- any effects this may have on pay progression - appendix 2 provides links to NHS terms and conditions and contracts
- if a referral is required to your professional body
- If you have not demonstrated your competencies or failed practical assessments (appendix 6).
- **Failure to consistently demonstrate required competencies may result in you being unable to continue working in your current role. This could lead to management action in accordance with the Supporting Performance Policy or, where appropriate, the Disciplinary Policy.**

Section 2:

Managing mandatory learning



Manager's responsibilities

As a manager, you play a vital role in ensuring a safe environment and competent workforce.

You are required to lead by example by completing your competency assessments and, where necessary, mandatory learning. It's important that you support your team in doing the same.

You are responsible for:

- ensuring your team members complete all their mandatory learning and have up-to-date competencies
- allocating sufficient time for team members to complete any mandatory learning or demonstration of competency before any given deadlines
- supporting individuals who are demonstrating unsafe practices, which may include requesting that they repeat mandatory learning
- ensuring key points from the mandatory learning are discussed regularly at team meetings and at 1-to-1 meetings, managerial supervision and appraisals
- providing feedback to the subject matter expert or learning and development on ways that could improve mandatory learning or competence assessments, such as accessibility, relevance, effectiveness or value

Others working on site

Agency workers, students, honorary contract workers, volunteers and individuals on secondment must also have up-to-date mandatory competencies appropriate to the role they are fulfilling.

If these competencies have not been demonstrated, the individual will not be permitted to carry out this role at the organisation.

Exclusions

If you feel that a mandated topic is not relevant to a group of learners under your management, you should inform learning and development and the subject matter expert. If appropriate, they can present a proposal to the local mandatory learning oversight group (MLOG) to consider revising the learning needs analysis for that topic.

Supporting mandatory learning

Managers, and supervisors of medics, must allocate employees, bank workers and locums, work time so they can complete mandatory learning.

There may be times when you need to take actions to balance operational or service requirements with the need to release learners from work to update competencies or attend a learning session.

However, these instances should be rare, and you need to prioritise time to update mandatory competencies before any deadlines.

Where a learner has failed to attend a booked session, you should discuss the reasons with the employee and agree appropriate actions. This may include recording the non-attendance and reasons behind it, as well as agreeing a plan for how the employee will demonstrate competencies as soon as possible.

When competencies have not been demonstrated

When you become aware that an employee has not demonstrated their mandatory competencies within the required period you should discuss with them:

- why it has not been completed, whether the reason is beyond their control and if they have made every reasonable effort to

complete it

- any support they require
- actions to ensure it is demonstrated as soon as possible

If you discover that records are incorrect, contact learning and development or workforce systems helpdesk promptly for advice.

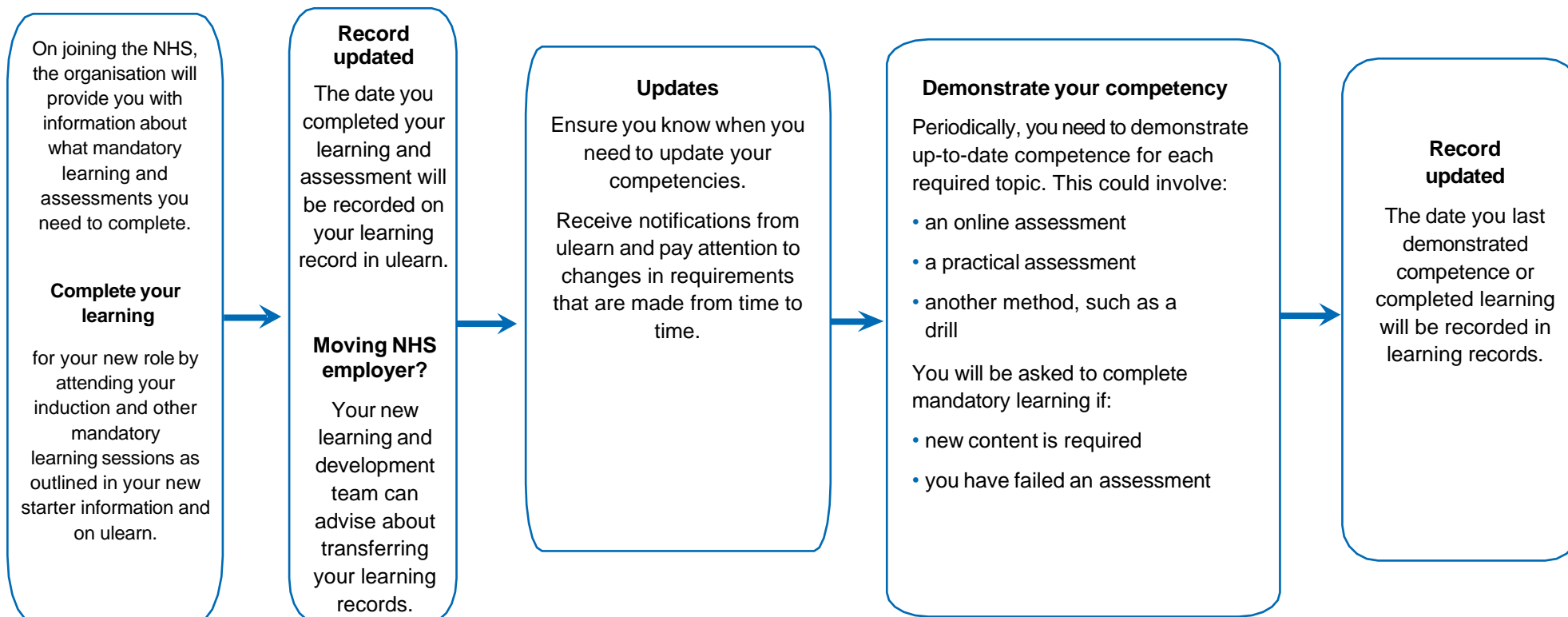
If the issue of non-demonstration is not resolved, you should get advice from Head of Service or a member of the HR team to consider:

- using other policies, such as the supporting performance policy to manage ongoing concerns about an employee not updating mandatory learning, especially if pay progression may be affected. Appendix 2 provides a link to NHS terms and conditions and contracts
- if a referral may be required to a professional body
- if continued non-demonstration will result in someone not being able to complete their role

Non-demonstration of essential competencies should also be noted during appraisals, managerial supervision and 1 to 1s.

Appendix 1: Flowchart for learners

This flow chart provides an overview of the steps you need to take to ensure you meet the requirements for your mandatory learning.

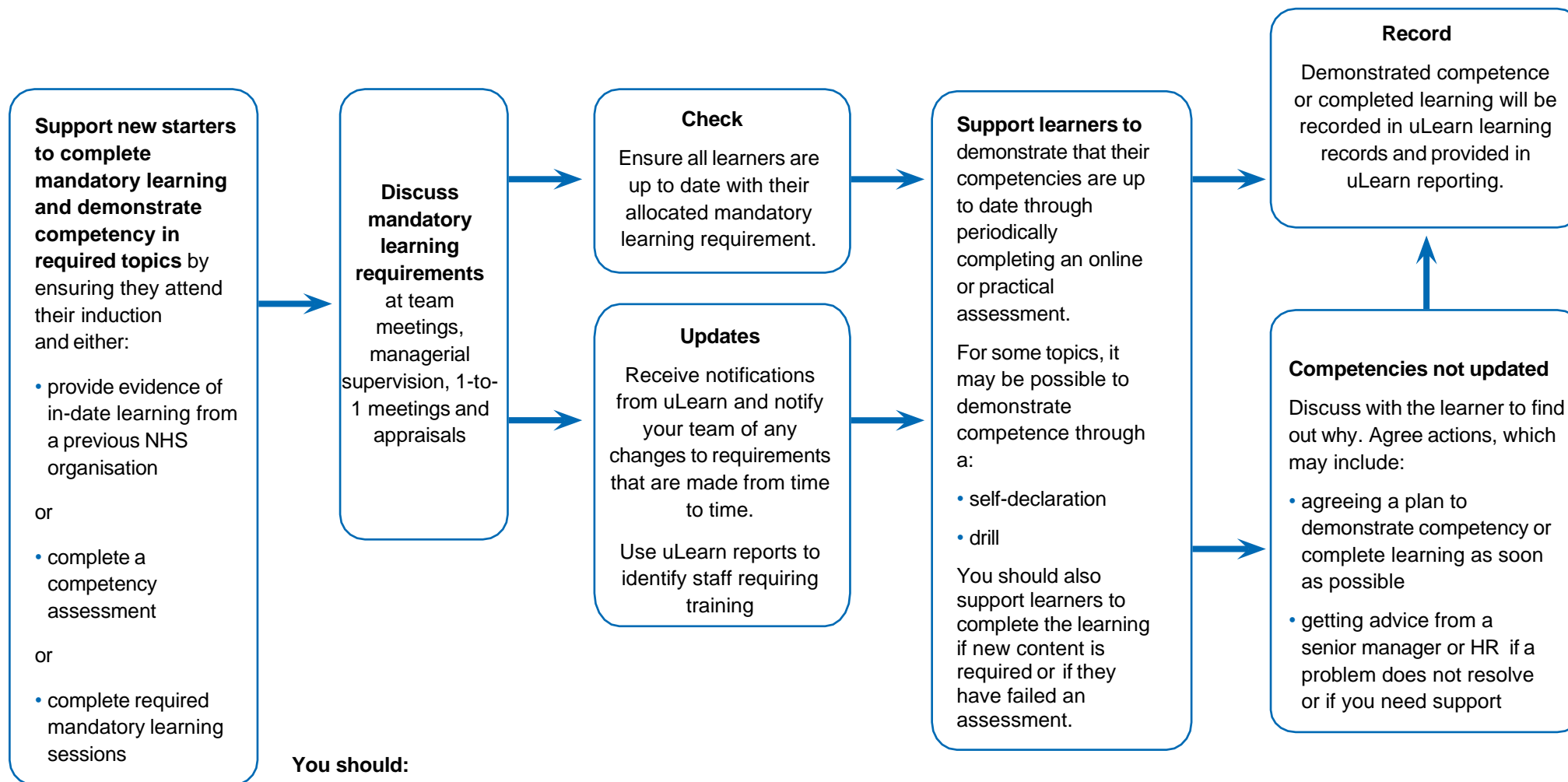


Talk to your manager if you:

- need help to use ulearn to complete learning or update your competencies
- feel that learning is not necessary for people doing your role
- need an exemption to your learning due to an approved reasonable adjustment and risk assessment

Appendix 1: Flowchart for managers

This flow chart for managers provides an overview of the steps to ensure the requirements for mandatory learning are met.



You should:

- provide help and support on how to use learning systems and update competencies
- discuss with the learning and development if learning might not be required for some or all your team

Appendix 2: Links to more help and guidance

Reform of statutory and mandatory training

NHS England is leading a programme to optimise, rationalise and redesign statutory and mandatory learning. This policy forms an important part of this work. More information is available from the [Learning Hub](#).

Nationally mandated topics

There is currently a requirement for NHS organisations to be aligned with the latest mandatory training as set out in the [Core Skills Training Framework](#).

As part of the reform programme, a new competency framework detailing all nationally mandated learning is being created with new learning content. Once launched, this will replace the Core Skills Training Framework. For more information, visit the [Learning Hub](#) or contact england.statmand@nhs.net.

e-Learning for Healthcare module content

The NHS England Technology Enhanced Learning Team are responsible for producing the national e-learning modules and can be contacted at support@e-lfh.org.uk

Terms and conditions guidance linked to mandatory learning

[The NHS Terms and Conditions of Service Handbook: Annex 23 Pay Progression](#)

[The consultant contract \(Schedule 15\)](#) sets out the requirements for medical consultants

[SAS doctors contracts](#) sets out the requirements for specialty and associate specialists

Appendix 3: How will we know this policy is effective?

We will monitor how effective this policy is by working in partnership with professional bodies, statutory organisations, trade unions and other stakeholders to collect information. This information will be used regularly to review and understand the impact of the policy on our people and will help us understand how we can improve. This table sets out how we will monitor this policy.

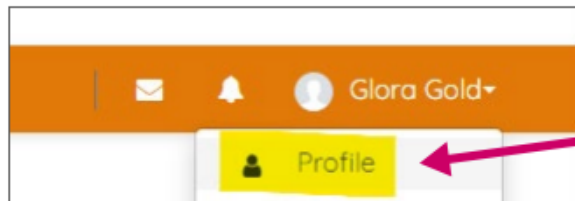
What element of this policy is to be monitored?	What is the method or information source, for example, audit or feedback	Who will be leading the monitoring?	When will the information be reviewed, by who or which group?	What are the arrangements for responding to issues and tracking the delivery of planned actions
Trends of increases or reductions of adverse incidents and risks that learning is targeted to improve.	Risk reports, freedom to speak up data, incidents, subject matter expert reports about risks and incidents (where learning would likely influence a positive outcome)	Subject matter experts	Local mandatory learning oversight group and overseen by the board. Governance groups for associated training topics	Annual reviews through governance groups will highlight changes and these will be monitored as part of annual review at MLOG with SME. Actions agreed and associated governance groups and SMEs to track delivery of actions
The effectiveness of mandated learning will be reviewed by the local mandatory learning oversight group and, at a national level, by NHS England	Mandatory compliance reports and feedback from relevant governance groups	Chair of the local MLOG	Annually by the local mandatory learning oversight group	Annual reviews through governance groups will highlight changes and these will be monitored as part of annual review at MLOG with SME. Actions agreed and associated governance groups and SMEs to track delivery of actions
Numbers of staff who are compliant with the policy.	Analysis of full compliance reporting and exceptions compliance reporting highlighting topics or staff groups below topic target compliant. Source data gathered via uLearn	L&D	Local mandatory learning oversight group and overseen by the Workforce Development Group	Learners and manager have access to live compliance data in the LMS. Reports on team and topic compliance monthly to governance groups.
Numbers of staff who do not attend mandatory learning sessions.	Did Not Attend reports to go to and further distributed to senior managers for information and follow-up	L&D	Local mandatory learning oversight group and overseen by the Workforce Development Group	Reports monthly on DNA and training space utilisation. Exec leads and Training lead review and agree actions.
Feedback about mandatory learning quality, relevance, effectiveness and accessibility	Learning feedback reports and analysis of feedback trends and information.	L&D	Local mandatory learning oversight group and overseen by the Workforce Development Group	Evaluations of training are collated and fed back to groups. SMEs collect evaluations and feedback locally and nationally.

Appendix 4: How is mandatory training allocated to me?

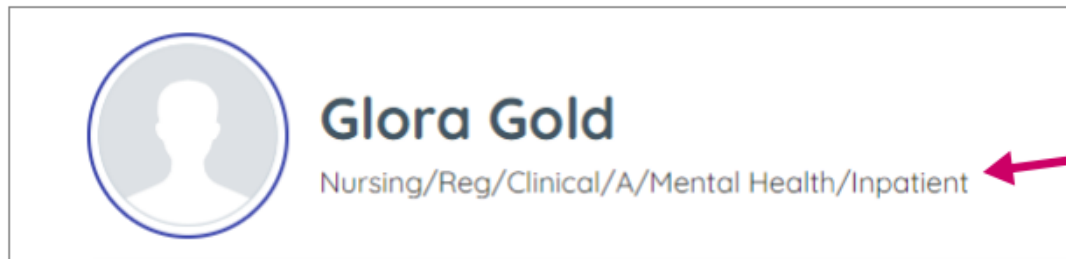
How is mandatory training allocated to me on uLearn?

This guide will show you how to check if your mandatory training is correct for your role and how to resolve any queries.

You can check your mandatory training by going to 'my compliance' on uLearn. If you think any of the training shown is incorrect for your role, first check your position title.



On the uLearn homepage click on your name (top right) and select profile



This is your position title, copied over from ESR.

If you manage staff and wish to check their position titles go to Reports and open "Manager: My Team List"

What is a position title?

Within ESR, each post has a 'position title'. This is different to a job title or position number and is used to trigger which mandatory and role essential topics are attached to the post.

The main variables that impact on the training required for each role are:

- the profession of the post holder
- whether they are a registrant or support worker
- whether they are clinical or non-clinical
- whether they work with adults, children, older people or a combination
- what sort of setting they operate in (for example, community, inpatient)

The position title holds each of those variables to help describe what the post is and what the post holder does, which in turn ensures the post is allocated the correct mandatory and role essential training to support their role.

An example of this would be **Nursing/Reg/Clinical/A/Mental Health/Inpatient.**

Below you can see an example of how each variable is used to allocate mandatory training.

Most training is allocated due to a combination of several of the variables in the position title.

For example, Dual Diagnosis is allocated to all **Clinical** staff in **Adult Mental Health** services

Variable	Training allocated to Nursing/Reg/Clinical/A/Mental Health/Inpatient (not including core training allocated to all staff)
Nursing = nursing care team	Moving and Handling L2
Reg = registration with a governing body required to undertake the role, for example, NMC or HCPC	Safeguarding Adults L3, Anaphylaxis L2, Duty of Candour, Medicines Management
Clinical = responsible for providing direct patient care	Care Coordination, Hand Hygiene, IPC L2, Mental Capacity Act, Oliver McGowan Tier 2, Preventing Radicalisation L3, Resus L3 (as inpatient), Safeguarding Adults L2, Safeguarding Children L2
A = adult care services	Management and Prevention of Falls, Sepsis in Adults
Mental Health = mental health working environment, services, patient care	Clinical Risk Assessment, Dual Diagnosis, Mental Health Act, Sexual Abuse Awareness
Inpatient = delivers job role in hospital or ward settings	Flat Lifting, Food Hygiene L1, Rapid Tranquilisation,, Safety Intervention Advanced and Emergency, Seclusion, Supportive Observations and Engagement

What about staff with more than one post?

For each staff member only their primary assignment (their main post) will appear on uLearn. This means if a staff member holds more than one role (for example, two substantive posts, or a substantive post and a bank post) only their primary assignment will appear in uLearn. This is a limitation of the system.

If you manage someone who holds more than one post, and you are not their nominated line manager on uLearn, you will not receive notifications or reports about that staff member. Instead, you'll need to keep track of their training compliance a different way. One way to do this is to ask the staff member to log into uLearn during a 1-1 so you can review their compliance and course completions together. You could also speak to their other line manager who will be able to see them on uLearn.

Who decides which training is allocated to a position?

- NHS England via the Core Skills Training Framework advise on the staff groups that require each mandatory training topic. These are automatically allocated to all positions.
- In addition, each topic has a subject matter expert or lead. They, through the topic's governance group, advise on which staff groups and position titles require their training. For example, Mark Dearden (Moving and Handling Advisor) and the Moving and Handling Steering Group advise on who requires flat lifting training.
- When a new position title is created, or if a manager requests a change to an existing position title (for example, community to inpatient) training requirements are updated. L&D review the request, and if it is straightforward, they will make the change. If it needs further investigation, they will refer it to the subject matter expert for advice.
- For consistency, we try to keep the variation in training requirements to a minimum. For example, all registered nurses in adult inpatient mental health services have the same training requirements.

What to do if you think your position title is wrong

- Speak to your manager first.
- Your manager will then need to contact the workforce systems helpdesk to request an update to your position title - lpt.workforcesystemshelpdesk@nhs.net
- The change will be made in ESR and then copied over into uLearn. It can take up to 48 hours from the change being made on ESR to show as updated in uLearn.

What to do if you and your manager agree your position title is correct but you still feel your allocated mandatory training is incorrect

- First check the Trust [mandatory](#) and [role essential](#) registers to confirm which staff groups the Trust lead has allocated the training to.
- If you still feel this is incorrect, your manager can email lpt.tel@nhs.net and request this is reviewed. The request will be added to the agenda for the next biweekly L&D Review Group and/or forwarded to the Trust subject matter expert for advice/approval.

Appendix 5: Mandatory training reporting grace periods



Mandatory Training Reporting Grace Periods

Effective from 1st September 2025

- Staff returning from long-term leave (e.g., maternity, adoption, career break, long-term sickness, external secondments) will now have a **4-week grace period** upon their return.
- During this time, they will be classed as **not available** but will have a status of **'Returned from Long Term Leave'**.
- These staff will not be counted within the compliance figures during this grace period, allowing sufficient time to catch up with training.

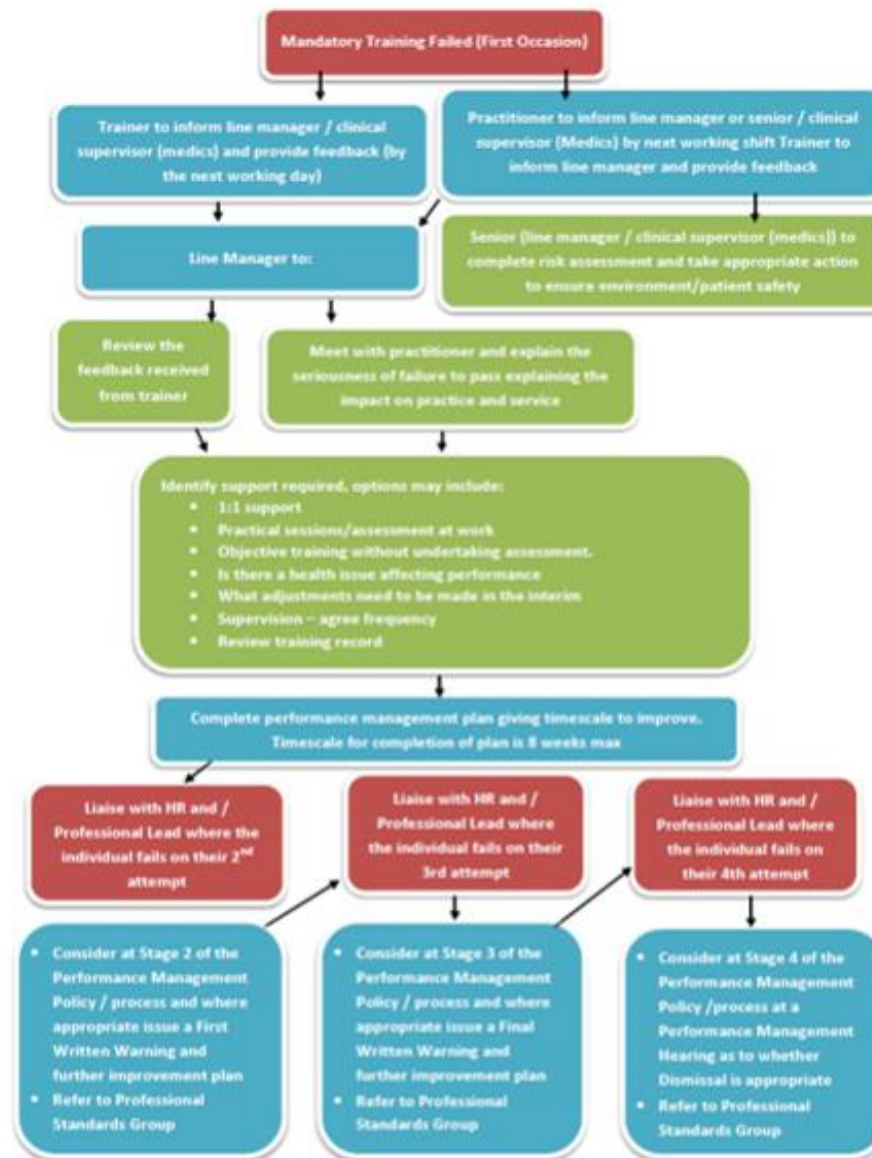
Effective from 1st March 2024

- Staff not available to work (e.g., on maternity leave, career breaks, external secondments, or long sickness absence over 28 days) are excluded from compliance reports.
- This applies to both the **Staff Status reports** and the **Trust-wide Flash Report**.
- All staff remain visible on **uLearn self-service reports** for manager oversight.

Effective from 1st January 2024

- **Grace periods** for new joiners:
 - **Mandatory and role essential training**: excluded for the first month
 - **Supervision**: excluded for the first 3 months
 - **Appraisal**: excluded for the first 6 months
- Grace periods do **not** apply to internal job changes or transitions from Bank to Substantive roles.
- These changes apply to the **Staff Status reports** and the **Trust-wide Flash Report**.
- All staff remain visible on **uLearn self-service reports** for manager oversight.

Appendix 6: Failure to pass mandatory learning assessment



Version 6 – December 2017

Guidance and templates



Organisational oversight of mandatory learning

Board responsibilities

- Provide a safe environment for both patients and all those that work in the organisation in line with legal requirements. Specifically, the Care Quality Commission regulation requires creating a culture where staff and those working in or attending are always safe and protected from avoidable harm. This requires boards to ensure that adverse incidents and risks of harm are measured, monitored and governed by relevant sub-committees of the board – for example, incidence of injuries by the health and safety committee – and that these committees consider all effective interventions (using the [Hierarchy of Effectiveness](#) as a guide), not just mandatory learning.
- Oversee the implementation and use of this policy by establishing a suitable senior multidisciplinary local mandatory learning oversight group (MLOG). Terms of reference template is available on the [Learning Hub](#).
- Receive an annual plan from the MLOG that quantifies the proposed investment of staff time and the expected improved outcomes and make any necessary adjustments.
- Review reports and escalations from the MLOG.
- Ensure that the organisation's trade union representatives and learning representatives play an active role in annual planning.

- Ensure that mandatory learning requirements are embedded into third-party contracts where people are working on site or providing services to NHS patients.

Mandatory learning within contracts

Mandatory learning requirements must be considered when contracting services to third parties. Where appropriate these requirements should be included in contracts and service level agreements with third-party providers of services to NHS organisations.

The manager or person managing the contract should discuss learning requirements with organisations to ensure the individuals work together to deliver all requirements as appropriate.

Local mandatory learning oversight group

The local mandatory learning oversight group (MLOG) oversees the delivery and effectiveness of mandatory learning across the organisation.

This group should oversee the delivery of nationally mandated topics and decide which topics should be added or removed from the list of locally mandated topics. To do this the MLOG should use the templates provided by NHS England for [Application for Mandatory Learning](#) and [Case for Mandatory Learning](#) (see more below).

This group is responsible for creating a local annual plan summarising the investment of staff time and the expected measurable improvements in outcomes from nationally and locally mandated training to be delivered for the next financial year (starting from March 2026).

This group should involve local trade union and learning representatives to ensure that the investment of employee time delivers maximum improvement in outcomes.

All locally mandated learning should be regularly reviewed to ensure the outcome measures and learning needs analysis (LNA) reflect the organisation's needs and continually demonstrate efficiency.

When it is agreed and ratified by the board, it is planned that key data from the local plan will be submitted via the Federated Data Platform (FDP) to aid benchmarking, workforce planning and national initiatives to improve training delivery and improve outcomes. .

Subject matter experts

Subject matter experts (SMEs) are responsible for minimising adverse incidents and organisational risk related to their topic area. This includes measuring and monitoring the number of adverse incidents and risks of harm, as well as determining whether mandatory learning is effective in supporting safety, reducing risk of harm or improving patient outcomes or whether other interventions would be more effective and efficient.

For nationally mandated learning, SMEs are required to apply the national guidance locally and will be provided with a mechanism to feedback to the nationally appointed SMEs as necessary.

For locally mandated topics and any new topics, SMEs should apply to and, if considered suitable, present a case to the MLOG.

Templates for the Application for Mandatory Learning and Case for Mandatory Learning are available from the [Learning Hub](#).

SMEs will define:

- the outcome measures and how they will be monitored
- the appropriate audiences for each locally mandated topic
- the learning outcomes, delivery methods and frequency of learning

And will also:

- propose how the learning and competence will be assessed
- suggest the appropriate staff groups that the subject should apply

SMEs are responsible for ensuring that feedback from completed modules is monitored and appropriate action is taken. This will include feedback about access, relevance, effectiveness and value.

It is important that national learning materials, including e-learning, are iteratively improved. Feedback on the national modules is encouraged and should be sent to the e-learning for healthcare team at support@e-lfh.org.uk

Annual mandatory learning plan

A local annual mandatory learning plan should be drafted by the statutory and mandatory learning lead with input from the relevant topic SMEs, starting from March 2026. It should be submitted for approval by the organisation's mandatory learning oversight committee and ultimately approved by the organisation at any relevant committee(s) and board(s).

It should quantify the planned investment of staff time and the expected improvement in beneficial outcomes.

Annual submission via FDP

It is planned that every organisation will be required to submit summary information from their local annual mandatory learning plan via the Federated Data Platform (FDP) so to:

- understand the total investment in mandatory learning
- enable benchmarking of different approaches
- gather relevant evidence of improved outcomes
- evaluate learning effectiveness

In addition to the template below, NHS organisations may be asked to send copies of their “Applications for Mandatory Learning” and “Cases for Mandatory Learning” for locally mandated training to build a library of evidence for all NHS organisations to access.

NHS England (or the successor organisation) will design the reporting via FDP and inform organisations when this is available.

What will happen to the data submitted

The data in the plans will be published on relevant dashboards to enable all organisations to see what each other is mandating and how this is being delivered. Information about access to existing dashboards is available on [the Learning Hub](#).

Likely data to be collected from annual plans via the Federated Data Platform (from March 2026)

Name of submitter	
Organisation name	
Headcount as of 1 March	
Date form submitted	

Nationally mandated topics

Nationally mandated topics	Headcount required to complete topic	Use national content (Y/N)	How long will it take to assess competency (if not using national content)	How long will it take to complete learning (if not using national content)	Renewal frequency	Expected measurable improvement in outcomes

Locally mandated topics

Locally mandated topics	Headcount required to complete topic	Use national content (Y/N)	How long will it take to assess competency	How long will it take to complete learning	Renewal frequency	Expected measurable improvement in outcomes