

University of South Australia



**STUDY ASSISTANCE
GUIDELINES**
for
**Professional, Document Services,
Grounds and Security Staff**

Human Resources Unit
November 2006

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OVERVIEW

The University of South Australia is committed to life long learning and provides an environment and a range of opportunities for staff to maintain and develop professional knowledge, skills, and expertise. The Study Assistance Scheme assists staff to gain a qualification that is relevant to their current position or career goals and maximises their contribution to the achievement of the University's goals.

Study assistance is usually provided for part-time study and may consist of one or both of the following:

- study release
- financial support with tuition fees.

These guidelines reflect the preferred practice of the University and guide effective and transparent decision making regarding the approval of study release time and financial support for an approved program of study.

Staff who will not be seeking study release or financial support do not require prior approval before enrolling in a program of study.

ELIGIBILITY

The Study Assistance Guidelines apply to Professional, Document Services, Grounds and Security staff who are employed on a full or part-time continuing or fixed term contract of one or more years.

Staff who are employed on successive fixed term contracts which individually are not in excess of twelve months are eligible to apply for study assistance when they have completed twelve months of service provided there is no break in service.

Study assistance, as outlined in these guidelines, does not apply to senior staff who are covered by the Senior Staff Collective Agreement or, where applicable, staff on an Australian Workplace Agreement.

GUIDING PRINCIPLES AND APPROACH

- Performance management provides the framework for a planned approach to staff development. The performance management planning and review process is the formal medium for discussing and recording staff members' professional and career development goals and actions.
- The University's approach to supporting staff to undertake further study is based on reciprocity and shared commitment.
- The University may support further education and training that is relevant to the staff member's current position or career goals and maximises their contribution to the achievement of the University's goals. Study may be through a TAFE Institute or another Registered Training Organisation.
- Degree level study supports the acquisition of a range of generic skills such as basic research, report writing and communication, which are likely to benefit the performance of staff. The University may support undergraduate study at UniSA that positively contributes to work performance and the achievement of the University's goals.
- The University may support postgraduate study at UniSA that is relevant to the staff member's position or career goals and the needs of the workplace. Professional doctorate or research degree study should significantly contribute to the attainment of

the University's strategic goals and require initial approval by the relevant Pro-Vice Chancellor or Executive Director.

- Study at a university other than the University of South Australia may be supported in full or with a reduced level of assistance if the senior manager is satisfied there is good reason for the staff member to study at another university.
- Study assistance is generally given for study that leads to a qualification compatible with the Australian Qualifications Framework. This includes On Campus and External studies.

Note: The study assistance scheme does not guarantee staff a place in a UniSA program and entry requirements apply.

RELEVANT TERMS

Study release refers to approved time off during working hours, with continuation of ordinary salary, for the purpose of undertaking an approved program of study.

Financial support refers to the reimbursement of a proportion of tuition fees from the Human Resources Unit's Study Assistance fund.

Academic period refers to a study period, semester or trimester at a university, TAFE Institute or other Registered Training Organisation.

Supervisor refers to the person who directly supervises or manages the applicant and is responsible for performance management.

Senior manager refers to the academic or administrative manager as per the Vice Chancellor's Authorisations, for example, Head of School, Research Institute Director, Unit Director, Division Manager.

Industrial Instrument refers to the applicable Collective Agreement, Award, Australian Workplace Agreement, contract of employment, or legislation.

STUDY RELEASE

Conditions for granting study release

- In calculating and approving an appropriate allocation of study release, supervisors and managers will take into account
 - The staff member's capacity to manage both study and work commitments.
 - How the staff member's study needs can best be supported.
 - The business requirements of the local area, the impact on other staff and how the level of service provision can be maintained in the staff member's absence.
 - The number of requests from other staff for study release and how this can be managed fairly and equitably.
- Study release is approved for one academic period, or for year long courses, the academic year. Ongoing support will be dependent on a satisfactory level of work performance and evidence of successful progress with studies.
- Study release
 - cannot be used to repeat a course, except in exceptional circumstances

- is forfeited when the staff member withdraws from a course
- is not available while the staff member is on other forms of leave e.g. sick, parental, recreation.
- Weekly leave and travel time are only available during official study periods.
- Where study does not require on campus attendance, the staff member and the supervisor/manager should discuss and agree on the timing and method of taking leave.
- Study release must be used for study purposes e.g. attendance at lectures/tutorials on or off campus, attendance at summer/winter schools, to undertake research or to meet external study requirements.
- Study release time would not normally be approved if it will result in the replacement of staff, paid overtime or a request for leave in lieu of overtime.
- Additional study release for higher degree studies may be granted, on a case by case basis. This requires the support of the senior manager and approval by the relevant Pro-Vice Chancellor or Executive Director.

Provisions

To be considered for the maximum time release, staff would normally be undertaking a 0.25 equivalent fulltime student load (EFTSL) in the academic period for which study time is sought to a maximum of a 0.5 EFTSL over the academic year, for example, four 4.5 unit UniSA courses in an academic year. Where study load is less, study release will be adjusted accordingly.

Part time staff may be granted a proportional (pro-rata) amount of study time, based on the fraction of the equivalent full-time hours worked and their study load.

Study requiring on campus attendance

	Maximum release time	For example
Compulsory weekly attendances	Up to 6 hrs per week Up to 1 hour travel time	For enrolment in two 4.5 unit UniSA courses in one study period.
Intensive attendance	Up to 10 days block leave over the academic year.	2.5 days study release to attend a 4.5 unit summer/winter course at UniSA.
Weekly attendances combined with intensive attendance	Up to 3 hrs per week and 2.5 days block leave in one academic period	For enrolment in two 4.5 unit UniSA courses in one study period.

Study not requiring on campus attendance

Up to 10 days in the academic year, for example, 5 days per study period.

Examination leave

Study release may include leave for the period of an examination held during the customary hours of work.

STUDY RELEASE APPLICATION PROCESS

The process for applying for study release and the application form are provided in Appendix One.

FINANCIAL SUPPORT

The University may provide financial support through the Human Resources Unit's Study Assistance Fund to support staff to undertake an approved program of study.

Eligible staff can apply for financial support for tuition fees if they

- are enrolled in an approved program of study
- are studying in addition to their normal duties
- have prior approval for the study for which financial support is claimed
- are maintaining a satisfactory level of work performance
- have personally paid for the expenses claimed and have not received other financial support for their studies, for example, payment by the local area
- are making satisfactory progress with their studies.

Provisions

The University may reimburse a proportion of tuition fees for

- Commonwealth supported courses
- Fee paying university courses
- TAFE courses
- Vocational Education and Training courses through a private Registered Training Organisation.

The level of financial support is dependent on the allocated budget in the Human Resources' cost centre and the quantum of claims.

FINANCIAL SUPPORT APPLICATION PROCESS

The process for applying for financial support and the application form are provided in Appendix Two.

APPEALS

Staff members are referred to the Staff Appeals Policy (HR - 6.4) or procedures contained in the applicable industrial instrument with respect to grievances regarding study release or financial support.

RESPONSIBILITIES AND AUTHORITIES

Responsibility for the application of these guidelines is a joint responsibility of the staff member, their supervisor and the senior manager.

The Human Resources Unit is responsible for the development and continuous improvement of these guidelines.

ASSOCIATED DOCUMENTS

- HR 8.1 - Study Release Application
- HRIS 031 – Financial Support Application
- Performance Management Policy (Policy No. HR-25.0)
- 2006 Academic & Professional Staff Collective Agreement (as amended or replaced)
- The University of South Australia (Document Services) Collective Agreement 2006 (as amended or replaced)
- The University of South Australia (Security and Grounds Staff) Enterprise Agreement 2005 (as amended or replaced)

FURTHER ASSISTANCE

Management and staff may seek further advice from:

- The local HR Coordinator/contact
- The Human Resources Unit
- The Human Resources Web Site

APPENDIX 1: APPLYING FOR STUDY RELEASE

Supervisor refers to the person who directly supervises or manages the applicant and is responsible for performance management.

Senior manager refers to the academic or administrative manager as per the Vice Chancellor's authorisation, for example, Head of School, Unit Director, Division Manager.

Study release is negotiated and approved as part of performance management and development discussions.

1. Staff member and supervisor discuss proposed program of study and supervisor confirms that it is the best choice of study and method of study based on development needs and what both are able to commit to.
2. Staff member completes the HR 8.1 Study Assistance: Study Release Application form and forwards it, with relevant documentation, to their supervisor for endorsement. Relevant documentation includes:
 - for continuing study release applicants, an official statement of the previous year's assessment.
 - for new study release applicants, the letter of offer.
 - evidence of timetable indicating study times and study load of proposed course.

In their application, staff should present a sound rationale for support when making an initial application or when their work or study circumstances change, for example, when changing a program of study; when moving to a different position or work area in the University.

The supervisor either recommends or does not recommend the application and forwards it to the senior manager.

The senior manager considers the application for approval. The approved application is forwarded to the local HR Coordinator or nominated HR Officer for processing. A copy of all documentation on study release approval and alterations is kept in the staff member's file. If the application is not approved the senior manager outlines the reason in writing.

See note below for applications that require approval by the Pro-Vice Chancellor or Executive Director.

3. If the application is approved, the senior manager or nominee (e.g. local HR) informs the applicant in writing that their application for study release has been approved. (Refer to the Study Leave Approval template.)

NOTE

Enrolment in doctoral studies

Staff who are considering undertaking doctoral study must seek support for enrolment from their senior manager to be eligible for study leave provisions. The senior manager must seek approval from the relevant Pro Vice Chancellor or Executive Director before approving the enrolment and any study leave assistance.

Additional study release

Additional study release for higher degree studies may be granted, on a case by case basis. This requires the support of the senior manager and approval by the relevant Pro-Vice Chancellor or Executive Director.



STUDY RELEASE APPLICATION

November 2006

Refer to the Study Assistance Guidelines before completing this application.

PERSONAL DETAILS

Family name: _____ Given name: _____

Staff ID number: _____

Position title: _____ Division/Portfolio: _____

School/Unit/Institute: _____ Campus: _____

UniSA staff Employment Status: [] Full Time [] Part time _____ hrs per week
[] Continuing Date
[] Fixed term contract commenced: _____ Proposed end date: _____

STUDY DETAILS

Qualification: _____ Institution and location:# _____

[] VET studies [] Foundation [] Undergraduate [] Postgraduate

Duration of full time program: _____ Date when studies commenced: _____

Expected date of completion: _____

This is

- [] An initial or amended application
[] A re-application for continuing studies Years when you have previously been granted study leave:

RATIONALE FOR SUPPORT

Applicants should present a sound rationale for support when making an initial application, when changing a program of study or when their work circumstances change, for example, moving to a different position or work area in the University.

If the university nominated is not UniSA please outline the reason in your statement for support.

Multiple horizontal lines for writing the rationale for support.

TIME RELEASE REQUESTED

[] Weekly leave

Table with 3 columns: No. of hours, No. of weeks, No of hours travel time

[] Block leave

Table with 2 columns: No. of days, Dates

Study mode: internal external mixed mode

Study load:

Will you be applying for Financial Assistance yes no

NAME OF APPLICANT: (please print) _____

SIGNATURE OF APPLICANT: _____ DATE: _____

RECOMMENDATION AND AUTHORISATION

To be completed by the supervisor with responsibility for performance management

- This study will support development needs identified through performance management and development discussions. I recommend this application for study release.
- I do not recommend this application for study release for the following reason/s:

NAME OF SUPERVISOR: (please print) _____

SIGNATURE OF SUPERVISOR: _____ DATE: _____

To be completed by the senior manager as per the Vice Chancellor's Authorisations

- Approved Not approved for the following reason/s:

NAME OF SENIOR MANAGER:
(please print) _____

SIGNATURE OF SENIOR MANAGER: _____ DATE: _____

To be completed by the Pro Vice Chancellor or Executive Director (where appropriate)

- Approved Not approved for the following reason/s:

NAME
(please print) _____

SIGNATURE _____ DATE: _____

APPENDIX 2: APPLYING FOR FINANCIAL SUPPORT

Call for applications

Claims for study completed in the academic year are submitted to the Human Resource Unit by the end of February of the following year. Claims will not be backdated for study in previous academic years.

An announcement reminding staff of the due date for application for financial support is posted on the staff portal – myUniSA – in January of each year.

Submitting an application

Supervisor refers to the person who directly supervises or manages the applicant and is responsible for performance management.

Senior manager refers to the academic or administrative manager as per the Vice Chancellor's Authorisations, for example, Head of School, Research Institute Director, Unit Director, Division Manager.

1. Staff member completes the HRIS 031 Financial Support Application form and forwards it, with relevant documentation, to their supervisor for endorsement. Relevant documentation includes:
 - Evidence that they have prior approval for the studies for which they are claiming reimbursement e.g. a copy of the Study Release application form or the relevant section from their performance management and development plan.
 - Documentation showing enrolment and fee information, such as the Commonwealth Assistance Notice (CAN) or Enrolment Confirmation Notice (ECN).
 - Evidence of satisfactory progress e.g. copy of academic transcript or letter from study supervisor.
2. The supervisor either recommends or does not recommend the application and forwards it to the senior manager for approval.

If the application is not approved the senior manager outlines the reason in writing.

3. Once approved, the completed application form is sent directly to:
Study Assistance Committee
HR Unit
Level 3, 101 Currie Street

Confirmation of receipt of application

Staff will receive an email from the HR Unit acknowledging receipt of their application.

Reimbursements

The Study Assistance Committee will meet to consider applications and make recommendations to the Director: Human Resources.

Staff will be advised of the amount to be reimbursed and the date it will be paid through the payroll system.

Any payment will be incorporated in the individual's taxable income on their group certificate. Tax will be deducted, however, staff should consult their tax advisor regarding amount claimable as a tax deduction in the relevant tax year. Original copies of all documentation should be retained for audit purposes.



FINANCIAL SUPPORT APPLICATION

Updated
January
2009

PERSONAL DETAILS

Family name: _____ Given name: _____

Staff ID number: _____ Professional/Academic (please circle)

Position title: _____ Division/Portfolio: _____

School/Unit/Institute: _____ Campus: _____

Program of Study: _____ Institution and location: _____

Date when studies commenced: _____ Expected date of completion: _____

TO BE COMPLETED BY APPLICANT

I have attached:

- ✓ Proof of study approval prior to commencement of study for which payment is being claimed e.g. Study Release application form or relevant section of my performance management plan.
- ✓ Documentation showing enrolment and fee information eg. Commonwealth Assistance Notice (CAN) or Enrolment Confirmation Notice (ECN).
- ✓ Evidence of satisfactory progress, e.g. copy of academic transcript or letter from study supervisor.

I certify:

- ✓ This request for financial support is directly related to my approved program of study.
- ✓ I have successfully completed the relevant course(s)/subject(s) within normal time limits.
- ✓ That I am studying in addition to my normal duties.
- ✓ That I have not received financial support for the expenses claimed from any other source e.g. School, Unit or Division and I have personally incurred these expenses.

NAME OF APPLICANT:

(please print) _____

SIGNATURE OF APPLICANT: _____ DATE: _____

Applicants are advised that any allowance will be incorporated in your taxable income on your group certificate. Tax will be deducted, however, you should consult your tax advisor regarding amount claimable as a tax deduction in the relevant tax year. You should retain originals of all documentation for audit purposes.

Claims for study completed in the academic year are due to the Staff Assistance Committee, Human Resource Unit, Level 3 – 101 Currie Street, City West Campus by end February of the following year.

TUITION FEES		
Academic session(s) e.g. study period 1; semester 1	Year	Course Fee amount
TOTAL FEE AMOUNT CLAIMED		

ENDORSEMENT

To be completed by the supervisor with responsibility for performance management

- This study supports development needs identified through performance management and development discussions. I recommend this application for financial support.
- I do not recommend this application for financial support for the following reason/s:

NAME OF SUPERVISOR: (please print) _____

SIGNATURE OF SUPERVISOR: _____ DATE: _____

To be completed by the senior manager as per the Vice Chancellor's Authorisations

- Approved Not approved for the following reason/s:

NAME OF SENIOR MANAGER: (please print) _____

SIGNATURE OF SENIOR MANAGER: _____ DATE: _____