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**Policy Steward:** Executive Director, Human Resources & Ohs

# Staff Development, Education and Training Procedure (MPF1149)

## GOVERNING POLICY

This procedure is made under the [Staff Development, Education and Performance Policy](#) .

## SCOPE

This policy applies to all staff at the University.

## PROCEDURE

### 1. Staff education scheme

1.1. An eligible professional staff member who wishes to participate in the Staff Education Scheme by undertaking a recognised course of study may apply in writing for study leave under the Scheme to their supervisor (level 1 delegate) at least three months before the course commences. The application should include the following information:

- length of service with the University
- name of course
- institution
- a copy of the completed course application form
- name of subject/s
- year of course
- a statement regarding the applicability of the degree to their job
- study leave requested.

1.2. An eligible professional staff member is a professional staff member who has completed the probation period and is:

- a continuing staff member, or
- a fixed-term member of staff with at least 12 months service and at least a further 12 months appointment in prospect.

1.3 A recognised course of study is a course of study, including a special or bridging course, that leads to a recognised qualification from an institution acceptable to the University such as:

- a university
- a TAFE college

- any other accredited course at a tertiary institution or professional organisation, that may be undertaken by course work, distance education or web-based learning.

1.4. A level 1 delegate may, having regard to the operating efficiency of the department, approve study leave for an eligible professional staff member to undertake a recognised course of study which will:

- assist the staff member's professional development or career development, even if the course or subject is not directly related to their current work
- meet the University's skill development needs
- develop the individual's skills relevant to the higher education sector.

1.5. The following weekly study leave is allowed to a full-time staff member who has obtained approval for study leave:

- up to 4 hours of paid leave per week for lectures or up to 6 hours of paid leave per week if practical classes are involved
- examination preparation leave of 4 hours of paid leave per examination.

1.6. A full-time staff member who has obtained approval to undertake a recognised course by distance education, web-based learning, compulsory residential school or practical sessions, may be allowed study leave of 2.5 days per subject up to a maximum of 5 days per semester, in lieu of weekly study leave.

1.7. A full-time staff member who has obtained approval to undertake a research-based degree (where at least 50% of the course assessment is based on original research and the production of a thesis) is entitled to 5 days study leave per semester for the research component of the course.

1.8. A part-time staff member is entitled to pro-rata study leave.

1.9. A staff member may use study leave for the purposes of:

- attendance at lectures, tutorials, residential schools, field days, etc., where these are held during working hours
- necessary travel during working hours to attend lectures, tutorials, residential schools, field days, etc. held during or outside working hours
- private study associated with examination preparation or research leading to a thesis.

1.10. A staff member who has obtained approval for study leave may take study leave:

- during semester time
- for intensive courses run outside of normal semester time
- official summer schools.

1.11. Study leave is not available:

- for classes held outside normal working hours or on a public holiday
- after the last day of classes
- if an emergency situation arises in the work unit and the staff member's attendance is required
- for a failed subject, unless study leave was not previously approved for that subject or the member of staff can demonstrate that the reasons for not passing the course at first attempt were outside of his or her control.

1.12. A staff member may, with the approval of their supervisor or head of school or unit, vary working arrangements to allow for study leave to be taken in normal working hours in addition to the time granted as study leave. The staff member will make up the additional time taken in this way at times agreed with the supervisor or head of school or unit. Making up time is not permitted during a lunch break.

1.13. A staff member will notify his or her supervisor immediately if he or she discontinues a course or subject for which study leave has been granted. Any study leave taken after discontinuing a course will

be charged to annual leave, flexi-leave or long service leave or taken as leave without pay.

## **2. Special studies program – short term**

2.1. A full-time or part-time academic staff member may apply to the relevant level 2 delegate to work away from the University for short periods up to 2 months for the purposes of:

- participation in special studies programs (SSP)
- research field work, where necessary for access to a research facility or research material not available locally
- conference attendance
- special training and
- other academic purposes.

2.2. A level 2 delegate, after considering the merits of the application, may approve the staff member's absence for the above academic purposes and will note the absence in faculty and departmental records.

2.3. Where an academic staff member seeks an assistance grant for a period of absence on academic duty, the staff member can apply for partially funded travel via the University [Travel Portal](#) .

2.4. Where a dean, head of department or authorised officer approves the payment of an assistance grant to a staff member for a period of absence on academic duty:

- payment is restricted to once in any year for either conference leave, whether within Australasia or overseas, or an SSP of between 2 weeks and 2 months
- deans have the discretion to provide assistance more than once in a year.

2.5. The level and source of financial support will be:

- in the case of international travel, 60% of the most economical international return air fare
- in the case of domestic travel, 75% of the most economical return air fare, plus living expenses for up to 3 days in accordance with the Travel Procedure.

2.6. Where the head of department or dean agrees to cover all expenses, the provisions of the [Travel Procedure](#) apply.

2.7. A staff member will obtain travel insurance for work-related overseas trips in accordance with the [Travel Procedure](#) .

## **3. Special studies program – long term**

3.1. The head of budget division will call for applications for special study programs (long) (SSP)(L) twice each year from eligible academic staff who meet the service pre-requisites.

3.2. The call for applications:

- in March, will be for SSP(L) to be taken in the first six months of the following year
- in September, will be for SSP(L) to be taken in the second six months of the following year.

3.3. An eligible academic staff member who may apply for SSP(L) is:

- a full-time or part-time member of the academic staff who holds a continuing appointment at level A or above and is employed from University Recurrent Funding
- a fixed-term academic staff member who holds an appointment at level A or above, who is employed from University Recurrent Funding, and whose current appointment will enable him or her to serve the University on return for a period at least equivalent to the SSP(L)

- an academic staff member employed from research funds or sources other than University Recurrent Funding sources, if the conditions of funding permit it, or when the department is prepared to support any required funding.

3.4. A head of department and head of budget division will consider an eligible academic staff member's application to undertake a SSP(L) on the condition that the staff member has:

- completed three years' service from the date of appointment to an appropriate classification
- completed three years' service from the date of return from a previous SSP(L).

3.5. Periods of absence on a SSP(L) or periods of leave without salary do not qualify as periods of service for consideration towards SSP(L) eligibility.

3.6. Some credit, although not necessarily full credit, may be given when the staff member applies for a SSP(L), if the member of staff has held a continuous full-time appointment at level A or above in another Australian higher education institution immediately prior to taking up appointment at the University, subject to the following provisions:

- no more than two months has elapsed between the cessation of employment with the releasing institution and commencement at the University
- the category of previous employment is one for which the University would ordinarily grant SSP(L)
- the staff member has completed a minimum period of two years' service at the University
- previous absences on SSP(L) granted by a former institution will be taken into account
- the period of leave approved will not exceed six months unless the applicant's terms of appointment explicitly state otherwise.

3.7. Where the head of budget division requires a member of staff to defer an application for a SSP(L), a period of time equal to the duration of the delay may be considered as a credit towards meeting the staff member's SSP(L) service requirements for their next SSP(L) application. Where the member of staff delays for personal reasons, no additional credit towards service requirements will be available.

3.8. The head of department will make a recommendation to the head of budget division to approve an SSP(L) application. The recommendation will include:

- advice whether appropriate arrangements can be made to carry out the work of the department during the absence of the member of staff
- comments on the aims of the planned program and their relevance to the work of the department and to the capacity of the applicant to carry out the program successfully.

3.9. If a head of department does not support an application for an SSP(L), the head of budget division will review the application.

3.10. The comments of the head of department must be seen by the applicant before it is forwarded to the head of budget division and be given the opportunity to make further comment.

3.11. A head of budget division may approve an application for SSP(L) where they are satisfied that:

- the applicant is an eligible academic staff member who meets the service requirements for SSP(L)
- the period of SSP(L) is between two and six months, or grounds exist for awarding an extended SSP(L)
- the planned specific outcomes of the SSP(L) will enhance the contributions of the member of staff to research, teaching or scholarship and provide significant benefit to the University
- the planned program will substantially add to the expertise and knowledge of the staff member
- the applicant has a proven and sustained record of productivity in research, teaching and scholarship or shows considerable promise as demonstrated in the applicant's recent publication record and the outcomes of previous study programs
- the proposed program justifies the period requested and it could not be undertaken at the University.

3.12. A head of budget division will approve an application for SSP(L) at least six months in advance, however, in exceptional circumstances may give approval up to eighteen months ahead.

3.13. When an application for SSP(L) has been approved by the head of budget division, the staff member will attach his or her application to a completed [SSP\(L\) Advice and Action form](#), signed by of the head of department and head of budget division, which includes details of the program, leave dates and the payment of a travel grant and travel allowance.

3.14. Where an applicant has a concern about the process or outcome of a head of budget division's decision, they should outline their concerns in writing to the Provost or Deputy Vice-Chancellor, who may discuss the matter with the head of budget division or, where appropriate, refer the matter to a nominated person for review and recommendation.

3.15. A head of budget division may award an extended period of SSP(L), up to a maximum of twelve months, where:

- it is the staff member's first period of absence to undertake a SSP(L)
- it is clearly demonstrated that the intrinsic nature of the project requires more than six months at another institution or location, in which case the names of two referees who are able to comment upon the planned research program must be provided
- the staff member's earlier participation in a program has been delayed by formal University duties or responsibilities above those routinely expected of staff
- the staff member's letter of appointment explicitly states that the first program following their appointment may exceed six months
- a single period of greater than six months would be more convenient to the department and University than two or more shorter periods of equivalent total duration.

3.16. A head of budget division may not award an extended period of SSP(L) to a fixed-term academic staff member.

3.17. Approval will not be granted for the writing up of research that has already been undertaken. A major publication which requires a prolonged period of sustained uninterrupted writing which could not be accommodated in normal non-teaching periods may be an exception to this.

3.18. During a period of SSP(L), the staff member will be paid at his or her normal salary rate except that, if the program is to be undertaken overseas the staff member may elect to be paid up to half their normal salary as a travel allowance, subject to indemnity and appropriate adjustments (for superannuation or other purposes).

- The travel allowance component may be paid in a lump sum up to six weeks before departure date (staff members electing to be paid a travel allowance should take into account the tax implications of this arrangement).
- Staff members will observe University and Australian Taxation Office requirements for the documentation and recording of activities and expenses.

3.19. A head of budget division will determine the allocation of travel grants to members of staff proceeding overseas on an SSP(L) which will be in accordance with [Schedule A - Travel Grants, Table 1](#) but will also take into account funds received from other sources during the SSP(L).

3.20. Heads of budget divisions are accountable for ensuring that funds for SSP(L) are allocated effectively and fairly and in accordance with University policy and will present an annual report on SSP(L) expenditure to Planning and Budget Committee.

3.21. A head of budget division may not authorise the payment of a per diem allowance (apart from travel allowance) to a staff member on SSP(L) except with the express approval of the Vice-Chancellor.

3.22. In special circumstances and subject to the approval of the head of budget division, who will take into account all sources of income associated with the SSP(L), a head of department may supplement the SSP(L) travel grant of an academic staff member with a grant of no more than the University grant. The value of the combined grants must not exceed legitimate documented expenses of the SSP(L).

3.23. Staff members are covered under the University's travel insurance policy and it is not necessary for staff to notify the Insurance Office prior to departure to activate this cover. Full details of the University's [travel insurance](#) are available online.

3.24. Variations in itinerary, organisational matters and matters of substance relating to the purpose of the program and its intended outcomes may be approved by the head of budget division on the recommendation of the head of department. Where such changes entail an increase in the Travel Grant the request for the variation must be approved by the head of budget division who will decide, in the light of funds available, whether the Travel Grant can be increased.

3.25. Deferral of a program will be accepted where the head of department advises the head of budget division in writing that a member of staff has been required to defer for departmental convenience.

3.26. Staff members will be subject to the University's policies and procedures while on SSP(L) and being paid from the University payroll.

3.27. The staff member is on normal University duty during SSP(L) and, with the exception of "one-off" paid lectures and seminars, will obtain approval for and report outside work in accordance with the [Outside Work Procedure](#) .

3.28. A staff member will take annual leave during SSP(L) that is not less than the pro rata annual leave accrued during the program. Staff members should consider any Fringe Benefits Tax implications prior to submitting applications for annual or long service leave.

3.29. Upon completion of an SSP(L) a member of staff will serve the University for a period at least equivalent to the SSP(L).

3.30. The whole or part of any salary, grants or allowances paid in relation to the period covered by the SSP(L) may be required to be repaid to the University should the required period of service not be served.

3.31. On return from SSP(L), the staff member will conduct a seminar or otherwise report to the department and submit a written report to the faculty through the head of department.

3.32. The head of department will comment on the report for the benefit of the head of budget division who will consider the comments when assessing future SSP(L) applications particularly regarding the extent to which the staff member fulfilled the aims of the approved program.

3.33. The staff member will also provide a copy of the written report to the local Human Resources officer to place in their HR file.

3.34. The outcomes of a special studies program will be considered in the context of the Academic Staff Assessment.

## **4 University fee discount scheme**

4.1. An eligible staff member or a member of the eligible staff member's immediate family wishing to obtain up to 25% fee discount in relation to a recognised course of study under the University fee discount scheme will follow normal enrolment and application requirements with the relevant faculty and meet standard University enrolment and fee timelines and policies, including payment due dates. The faculty will confirm staff member or immediate family member status as part of the enrolment processes.

- [Application form for staff member](#)
- [Application form for family member](#)

4.2. An eligible staff member under the University fee discount scheme is an academic or professional staff member who:

- is a part-time or full-time continuing member of staff or

- is a fixed-term member of staff with at least a further 12 month appointment.
- 4.3. A recognised course of study under the University fee discount scheme includes all University of Melbourne full fee paying [graduate courses](#) , with the exception of those listed in [Schedule B - Course Exemptions](#) , and [Community Access Program](#) subjects. Courses do not need to have a work-related purpose in order to obtain the discount.
- 4.4. A staff member may [salary package](#) University of Melbourne course fees by sending an [Salary Packaging In-house Benefits](#) form or a [Self Education / Course Fees](#) form to Employee Remuneration and Benefits Team, Human Resources, along with a copy of the course or subject invoice and receipt of payment.
- 4.5. Eligibility for University fee discounts for staff members and immediate family, and salary packaging arrangements will cease at the termination of employment.

## SCHEDULES

- [Schedule A - Travel Grants](#)
- [Schedule B - Course Exemptions](#)

## RELATED DOCUMENTS

- [University of Melbourne Collective Agreement 2010](#)
- [University of Melbourne Enterprise Agreement 2006](#)
- [Staff Development, Education and Performance Policy](#)
- [Delegations Policy](#)
- [Human Resources Delegations](#)
- [Outside Work Procedure](#)
- [Salaries, Loadings and Benefits Procedure](#)
- [Travel Procedure](#)
- [SSP\(L\) Advice and Action form](#)
- [Human Resources website](#)
- [Application form for staff member](#)
- [Application form for family member](#)

## DEFINITIONS

Term	Definition
<b>Immediate family</b>	A spouse (including a de facto spouse and a same-sex domestic partner) of the staff member and a dependent child or an adult child (including an adopted child or a stepchild), parent, grandparent, grandchild or sibling (including a step or a half-sibling) of the staff member or of the spouse of the staff member.

## RESPONSIBLE OFFICER

The Executive Director, Human Resources is responsible for the development, compliance monitoring and review of this procedure and any associated guidelines.

## IMPLEMENTATION OFFICER

The Director, People and Performance, Human Resources, is responsible for the promulgation and implementation of this procedure in accordance with the scope outlined above. Enquiries about interpretation of this procedure should be directed to the Implementation Officer.

## REVIEW

This procedure is to be reviewed by 28 February 2015.

## VERSION HISTORY

<b>Version</b>	<b>Approved By</b>	<b>Approval Date</b>	<b>Effective Date</b>	<b>Sections Modified</b>
1	Senior Vice-Principal	24 August 2012	24 August 2012	New version arising from the Policy Simplification Project. Loaded into MPL as Version 1.
2	Executive Director, Human Resources	18 March 2013	18 March 2013	Updated titles for sections 2 and 3.
3	University Policy Officer	12 November 2013	12 November 2013	Addition of new keyword 'study leave' in response to user feedback. No changes to procedure content.
4	Vice Principal Administration and Finance	21 May 2015	14 January 2016	Fix broken links in sections 3.13, 4.1, 4.4 and Related Documents.
5	Vice-President (Strategy and Culture)	24 January 2020	24 January 2020	Update to course exemption list to include Doctor of Veterinary Medicine.
6	Policy Officer	31 May 2022	31 May 2022	Changed Policy Approver.