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**Policy Approver:** Chief Human Resources Officer

**Policy Steward:** Director, Hr Specialist Services

## Staff Welfare Funds Procedure (MPF1171)

### GOVERNING POLICY

This procedure is made under the Remuneration, Recognition and Working Conditions Policy.

### SCOPE

This procedure applies to all current and retired staff of the University and their families in circumstances of special need.

### PROCEDURE

#### 1. Staff welfare fund

1.1 Limited assistance is available from this Fund as a loan or grant to meet pressing financial obligations. In circumstances of special need, members of staff or their dependent families, or the parents, widows or children of deceased members of staff may apply for assistance. Special circumstances might include:

- lengthy absence from work due to illness, where all paid leave credits have been expended
- being on sick leave without salary and needing to maintain contributions to a superannuation scheme
- other circumstances so judged by the head of department or Executive Director Human Resources.

1.2 A loan of not more than one month's salary may be made to an appointee from another country on commencement of appointment. This loan would be repayable by equal fortnightly deductions from the appointee's salary during the first year of service. If the appointment is less than one year, the loan is repayable by a salary deduction of the total amount during the last month of service.

1.3 Interest may be charged on all loans made from the Staff Welfare Fund.

1.4 In an emergency or in very special circumstances, a short-term loan, repayable with interest by deductions from salary, may be available from the Fund.

1.5 In a case of severe hardship, a loan may be made available free of interest, or a small non-repayable grant may be recommended.

1.6 The staff member or dependent/s applies for assistance by writing to the Executive Director, Human Resources, via the head of department setting out:

- the purpose of the loan
- amount sought

- proposed details of repayment (for example, salary deductions over a specified period).

1.7 The application for assistance letter should be marked 'Personal and Confidential'.

1.8 The head of department will make a recommendation to the Executive Director, Human Resources, concerning the request.

1.9 An interview will be arranged with the Executive Director, Human Resources and the staff member or dependent/s to ascertain the financial situation and background to the problem.

1.10 On this basis the Executive Director, Human Resources will make a decision.

1.11 After approval, an agreement is signed.

1.12 The original agreement is retained in the staff member's personal file and serves as the necessary authority to make subsequent salary deductions.

1.13 A copy will be given to the staff member with the loan cheque.

1.14 The Executive Director, Human Resources approves all grants and loans from the Staff Welfare Fund.

1.15 Actions related to the approval of loans from the Staff Welfare Fund will be reported to Senior Executive.

## **2. Retired staff welfare fund**

2.1 Limited loans or grants from this fund are available in special circumstances to retired staff members or their dependents. Special circumstances might include:

- substantial hospital and medical bills
- any pressing financial obligations
- special circumstances of distress experienced by dependents of retired staff members
- special circumstances of distress experienced by widows, dependent widowers or dependents of deceased retired staff members.

2.2 Interest may be charged on all loans made from the Retired Welfare Fund.

2.3 In a case of severe hardship, a loan may be made available free of interest or a non-repayable grant may be recommended.

2.4 The retired staff member, widow, widower, or other dependant/s applies for assistance by writing to the Executive Director, Human Resources setting out:

- the purpose of the assistance
- the amount sought and
- details of suggested repayment.

2.5 The application for assistance letter should be marked 'Personal and Confidential'.

2.6 An interview will be arranged with the Executive Director, Human Resources and the applicant to ascertain the financial situation and the background to the problem.

2.7 The Executive Director, Human Resources is responsible for the approval of loans or grants from the Retired Staff Welfare Fund.

2.8 After approval, an agreement is signed.

## RELATED DOCUMENTS

- [University Regulation 7.76: Edward Stevens Trust \(Staff Welfare Fund\)](#)
- [Remuneration, Recognition and Working Conditions Policy](#)

## 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, HR Specialist Services 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 30 November 2014.

## VERSION HISTORY

Version	Authorised by	Approval Date	Effective Date	Sections modified
1	Senior Vice Principal	21 August 2012	21 August 2012	New version arising from the Policy Simplification Project. Loaded into MPL as Version 1.