

Study Assistance Scheme for Professional and Academic Staff Policy

Section 1 - Purpose

(1) The QUT Study Assistance Scheme is designed to encourage personal and professional development of staff and to benefit the University as a whole. Financial assistance and leave to attend classes and examinations may be granted to eligible staff members enrolled in an approved course.

(2) For the purposes of this Policy, the authorising officer is prescribed in the [Register of Authorities and Delegations](#) (QUT staff access only).

Section 2 - Eligibility and Approved Courses

(3) No assistance under the scheme, whether financial or otherwise, can be made to any staff member unless prior approval, through Human Resources on the recommendation of the appropriate authorising officer, has been granted for the course of study to be undertaken. Courses of study are categorised under three levels of support as detailed below.

(4) On-going and fixed term full-time staff members, and part-time staff members (not casual staff) who have an appointment of 12 months or more are eligible to apply for study assistance, provided they are citizens of Australia or reside on an ongoing basis in Australia.

(5) Part-time staff receive pro-rata benefits, such as pro-rata reimbursement of course fees calculated according to the proportion of full time hours they work.

Types of Study

(6) Approval may be granted for courses of study undertaken at secondary and tertiary levels. Courses may be undertaken at or through approved educational institutions or approved private examining bodies.

(7) An approved educational institution or private examining body is an organisation widely accepted and accredited to provide teaching or facilities for assessment of results in the area of study concerned, including universities, TAFE and registered agencies.

(8) As far as possible, studies should be taken in metropolitan or near metropolitan areas. The authorising officer is asked to certify the appropriateness of higher degree studies undertaken outside the greater Brisbane area when approving courses of study.

Section 3 - Application for Course Approval

(9) Approval of a course of study is at the discretion of the authorising officer.

(10) Application for course approval must be made on the prescribed form which is available from Human Resources.

The staff member should complete an Application for Course Approval form, and forward it to their authorising officer for recommendation. The authorising officer will assess each application on the grounds of relevance to the applicant's personal and professional development and QUT needs. Applications, recommended and authorised by the authorising officer, are forwarded to Human Resources.

(11) Approval of a course of study operates for the entire period of the course, subject to satisfactory progress in study as well as in performance of duties. Therefore, once initial approval is given for a total course, further applications for course approval are unnecessary provided the course and educational institution remain the same. However, should a staff member change organisational areas during this time, approval must be sought from the new authorising officer.

(12) Should the staff member's work status change, the level of assistance from the University will also change. Assistance from the University is provided on a pro rata basis, and is calculated according to the percentage ratio of time the staff member is employed compared to a full-time position. For example, a staff member who is employed on a part-time basis (50 per cent) receives half of the approved financial assistance and exam leave available to full-time staff members.

(13) Upon cessation of employment with the University, Study Assistance will also cease.

Application for Course or Category Change

(14) A staff member may seek transfer of assistance to another category at any stage of an approved course of study, subject to the conditions of the category concerned.

(15) Applications for course change or transfer of category must be supported by the authorising officer, and forwarded to Human Resources for verification.

Section 4 - Levels of Study Assistance

(16) Courses of study are categorised under the following criteria to determine the level of financial or study leave assistance offered to approved staff.

- a. Category A applies where a staff member is required to enrol in a particular course as a condition of employment. This condition will be explicitly stated in the staff member's written offer of appointment;
- b. Category B applies where the course of study will directly contribute to the staff member's performance of duties or anticipated duties, identified from a consultative process. (for example, Performance Planning and Review meetings). Category B status is awarded where:
 - i. for courses with undergraduate status or lower, 50 per cent of course content directly relates to the staff member's duties or anticipated duties (for example, duties of positions with QUT which have been identified in a consultation process as part of the staff member's career path);
 - ii. for postgraduate and second degree courses, 75 per cent of course content directly relates to the staff member's duties or anticipated duties; and
- c. Category C applies where the study course is of a general nature, not directly related to the specific employment of the staff member, but is relevant to other positions in QUT and contributes to the continuing development of the staff member as an individual.

Section 5 - Financial Assistance

(17) Assistance from the University is provided on a pro rata basis, and is calculated according to the percentage ratio of time the staff member is employed compared to a full-time position. For example, a staff member who is employed

on a part-time basis (50 per cent) receives half of the approved financial assistance available to full-time staff members.

Conditions of Fee Reimbursement

(18) Reimbursement of fees for all categories is subject to the following conditions:

- a. fees will only be reimbursed in cases where course approval has been granted. Reimbursement for study prior to the date of course approval will not be supported;
- b. fees will only be reimbursed for units passed. Where partial failure of a course program is recorded in an academic year, a pro rata system of reimbursement based on number of units passed will operate;
- c. reimbursement of fees is available only where staff undertake approved study for the majority of a prescribed educational period, e.g. a semester or term;
- d. reimbursement of fees is only available to staff who elect to pay by the upfront method;
- e. a staff member holding a scholarship providing payment of fees will be reimbursed for fees not met by the award; and
- f. a staff member must furnish evidence of satisfactory performance in units where reimbursement of fees claimed, for example, copy of results or Supervisor's statement.

(19) Where a staff member claims special circumstances such as poor performance in studies as a result of mitigating circumstances or late withdrawal of studies, the decision of the educational institution regarding such events will be taken into account when considering an application for reimbursement of fees.

Levels of Fee Reimbursement

(20) Where study programs have been approved and the above conditions have been satisfied, reimbursements will apply as follows:

- a. Costs of preparation of masters and doctoral degree theses will be subsidised under the scheme to limits determined by the Vice-President (Administration) and University Registrar. Human Resources staff can advise of these amounts.
- b. Categories A and B: QUT will refund to staff who have had applications approved, all statutory fees (excluding penalty fees) levied by the institution conducting the course including tuition, examination, union or guild fees, compulsory equipment fees, and expenses of compulsory field excursions.
- c. QUT will also refund student contribution amounts to staff who have had applications approved, in cases where staff have elected to pay "up-front" the amount owing for a semester by the appropriate date. The University will not reimburse student contribution amounts to staff who elect to pay through the taxation system ([HECS-HELP](#)). Faculties/divisions, schools/departments that elect to pay any contribution amounts on behalf of the staff member will not be reimbursed from the Study Assistance Scheme.
- d. Similarly, the University will not reimburse monies to staff engaged in postgraduate study who elect to defer fees to the [FEE-HELP](#) program. All fees must be paid up-front.
- e. Category C: The University will assist by refunding student union or guild fees, and fees for secondary school studies. QUT will not refund student contribution amounts, fees for post-graduate studies or other tuition fees.

Application for Reimbursement of Fees

(21) Reimbursement of fees will be made at the end of each semester. Student union or guild fees will be reimbursed on a semester or yearly basis, subject to the manner of payment pursued at the educational institution. Application forms are available from the Human Resources Department, and when completed should be forwarded to Finance Resource Management Department for reimbursement. If special consideration for the reimbursement of fees is

required, then the completed forms should be forwarded to the Human Resources Department. The staff member will assist the fee reimbursement process by:

- a. completion of the prescribed Application for Reimbursement form;
- b. attachment of original receipts and a copy of the original receipts; and
- c. attachment of statement of results of units for which reimbursement is requested or attachment of statement of satisfactory progress from the academic Supervisor in appropriate cases

Section 6 - Leave for Class Attendance, Study, and Examinations

(22) Where possible, staff members should arrange study schedules that will not adversely affect their work commitments.

Leave to Attend Classes

(23) For academic staff members, leave to attend classes will be arranged within the context of Performance Planning and Review meetings.

(24) Professional staff members, according to their approved category of study, are encouraged to attend classes at times which provide minimum disruption to the work area.

(25) Part-time professional staff are not eligible for leave to attend classes during their working hours. Working hours shall be arranged between the Supervisor and the staff member so as to facilitate attendance at classes.

(26) Where study programs have been approved under the categories described in Section 3 above, the following leave benefits will apply. Notwithstanding that the authorising officer is unable to certify that the leave will not unduly disrupt the operations of the area and no satisfactory alternative exists, authorising officers are encouraged to grant leave on the basis that time will be made up by the staff member at a time of mutual convenience.

(27) Category A: A maximum of eight hours leave on full pay to attend classes during work hours may be granted in any one week.

(28) Category B: Leave on full pay to attend classes during work hours may be granted (up to eight hours in any one week, maximum 4 hours per unit) where the authorising officer certifies that the leave will not unduly disrupt the operations of the area.

(29) Considerations which can be taken into account include:

- a. the employment of temporary staff;
- b. shared responsibilities with other staff members in neighbouring areas;
- c. redeployment of other staff; and
- d. switching of telephones to alternative offices.

(30) Category C: Leave on full pay to attend classes may be granted (up to five hours in any one week) where the authorising officer certifies that the leave will not unduly disrupt the operations of the area and where either of the following conditions apply:

- a. classes are available only during the staff member's work hours; and
- b. the staff member is concurrently enrolled in units that require attendance on at least two evenings per week.

(31) Considerations which can be taken into account regarding disruption of normal area operations are detailed under Category B in this section.

Examination Leave

(32) Leave on full pay to attend examinations is available for units of an approved course. Examination leave also includes the mornings of days in which examinations are held in the afternoon as well as the time spent travelling to and from the examination centre.

(33) Application for examination leave is made on an Application for Leave form available from the Human Resources Department. The relevant unit code should be shown on the application form.

(34) Part-time staff should arrange work rosters around examination periods. Only if this is not possible can an application for leave to attend examinations be made. Each case will be assessed on its merits.

(35) Examination leave is not available for take home examinations except where the duration of the exam is 24 hours or less. In these circumstances staff may apply for half a day's leave on full pay.

Study Leave for Examinations

(36) Leave to study for examinations is available on a pro rata basis to full-time staff members and on-going part-time staff members. At the option of the staff member, leave shall be either without pay or deducted from the staff member's recreation leave entitlement on a half day or full day debit basis.

(37) Leave is available to a maximum of two working days per unit in any one year, and to a maximum of 8 working days in any one year for all units undertaken as part of an approved course of study. Granting of leave is subject to the operational convenience of the area and is restricted to a period just prior to the date of examination.

Additional Leave

(38) A staff member undertaking an approved course of study can apply for additional leave for study or class attendance purposes. Granting of such leave is subject to operational convenience and the approval of the authorising officer. Such leave shall be at the option of the staff member either without pay or deducted from the staff member's recreation leave entitlement, on part-time release or extended absence on proportionally reduced salary.

Full-time Study Leave

(39) Refer to the relevant Professional Development Program policy for further information on full-time study leave ([Professional Development Leave \(PDL\) for Academic Staff Policy](#) and [Professional Development Program for Professional Staff Policy](#)).

Applications for Leave

(40) Applications for leave to attend classes may be made once course approval notification is received (for professional staff only). Application forms are available from Human Resources.

Section 7 - Compulsory and Non-compulsory Residential Schools

(41) Both academic and professional staff must make application for assistance to attend a compulsory or non-compulsory residential school. Documentary evidence that attendance at the school is compulsory must accompany the application. Application forms for leave to attend residential schools are available from Human Resources.

(42) Compulsory residential schools may be attended on leave with pay and non-compulsory residential schools on leave without pay according to the approved category of study as follows:

- a. Leave shall include travel to and from a compulsory residential school where such travel cannot be undertaken outside the standard working day. Residential schools do not include visits to Supervisors required as part of research degrees;
- b. Category A:
 - i. Compulsory residential schools may be attended through leave with pay to a maximum of 20 working days per annum;
 - ii. Reimbursement of the staff member's actual expenses is available for travel to and from the compulsory residential school at any time of the calendar week. This travel can be either by train, bus, private vehicle or single return air-fare (at the most economical rate) on the approval of the Human Resources Department;
 - iii. Reimbursement to prescribed limits is available for expenses incurred for accommodation and meals whilst travelling to and from the compulsory residential school and during the school; and
 - iv. Non-compulsory residential schools may be attended through leave without pay to a maximum of 20 working days per annum or through deduction from recreation leave on a half-day or full day debit basis.
- c. Category B:
 - i. Compulsory residential schools may be attended through leave with pay to a maximum of 15 working days per annum, with additional necessary leave being without pay to a maximum of five working days per annum, or through deduction from recreation leave on a half day or full day debit basis;
 - ii. Reimbursement of travel, accommodation and meal expenses is available as for Category A except for costs of accommodation and meals during the compulsory residential school and
 - iii. Non-compulsory residential schools may be attended through leave without pay to a maximum of 20 working days per annum or through deduction from recreation leave on a half day or full day debit basis.
- d. Category C:
 - i. Compulsory residential schools may be attended through leave with pay to a maximum of five working days per annum, with additional necessary leave being either without pay to a maximum of five working days, or through deduction from recreation leave on a half day or full day debit basis
 - ii. No costs for accommodation at the compulsory residential school or for travel to and from the compulsory residential school are provided under this category; and
 - iii. Non-compulsory residential schools, including travel to and from the schools, can be attended to a maximum of 10 working days per annum through leave without pay or through deduction from recreation leave on a half day or full day debit basis.

Financial Assistance concerning attendance at Non-compulsory Residential Schools

(43) Financial assistance for attendance at non-compulsory residential schools for categories A or B may be approved by Client Services, Human Resources, provided the content covered in the residential school is relevant to the duties of the staff member.

Section 8 - Appeal Procedures

(44) Staff members seeking to appeal against a decision made upon any matter relating to the granting of Study Assistance shall refer the matter to Client Services, Human Resources in the first instance.

(45) The Director, Human Resources - Client Services with the Vice-President (People) and Chief People Officer shall seek to resolve the issue with the staff member and the respective manager. Failing this, the staff member may make

use of the University's grievance resolution procedures ([Complaints Framework for Staff Policy](#)).

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