

## Financial Support for Approved Study - Guidelines for Academic Staff

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### 1. OVERVIEW

The University of South Australia is committed to continued learning of staff and provides an environment and opportunities for staff to maintain and develop professional knowledge, skills, and expertise.

The University may provide financial support for the study costs of eligible academic staff undertaking an approved program of study, through the Human Resource Unit's Study Assistance fund.

This guideline reflects the preferred practice of the University and guides effective and transparent decision making regarding the approval of financial support for academic staff engaged in an approved program of study.

### 2. ELIGIBILITY

The Study Assistance Guidelines apply to academic staff employed on a full time or part-time continuing or fixed term contract of twelve months or more.

Staff 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 this guideline, does not apply to academic staff covered by the Senior Staff Collective Agreement.

#### 2.1 New eligibility requirements for study commencing in 2017

All staff were initially notified in December 2015 the guidelines had been identified for review in order to assess their ongoing purpose and focus.

As an outcome of the review some changes to the guidelines will be introduced progressively over the next two years. This progressive implementation is required because financial support is made available on a retrospective annual basis.

For staff commencing a new program of study in 2017 onward, financial support and time release will be provided by the University for study at UniSA only. Special exemptions to this eligibility criteria can only be made through a business case to the Executive Director: People, Talent and Culture.

Staff already engaged in approved programs of study outside UniSA will be supported under the terms of the guidelines at the time of enrolment until that program is completed (in reasonable time).

### **3. GUIDING PRINCIPLES**

UniSA has a long history of supporting its staff by providing financial support for those who wish to undertake further study related to their employment and to advance their career goals.

This approach is reinforced by the principles of performance management, and based on an understanding of reciprocity and shared commitment between the University and staff member.

### **4. FINANCIAL SUPPORT**

The University, through the Human Resources Unit's Study Assistance fund, may reimburse a proportion of tuition fees for Commonwealth supported and fee paying programs of study undertaken at UniSA.

The level of financial support will vary each year as it is dependent on the allocated budget in the Human Resources cost centre and the quantum of claims.

Upon approval of the Executive Director: People, Talent and Culture, reimbursement of study costs will be distributed equally, as a percentage of total costs claimed by successful applicants, via the University payroll system.

Eligible staff must fulfil the following criteria before submitting an application for financial support:

- received prior approval by their immediate manager to undertake the study for which financial support is claimed
- successfully completed the units of study for which they seek financial assistance
- have not received other financial support for their studies, for example payment by the local area or professional development fund
- are maintaining a satisfactory level of work performance

Expenses for studies undertaken while staff are on paid leave such as Professional Experience Program (PEP) leave will not be reimbursed through the Human Resource Unit's Study Assistance fund.

#### **4.1 Financial Support Application Process**

Staff are invited to submit their application for financial support in January each year via the all staff announcements.

Staff seeking financial assistance for study must complete HRIS 031 Financial Support Application form, with all relevant documentation, to their immediate supervisor for approval.

Applications must be received by the Study Assistance Committee in the Human Resources Unit no later than the last business day of February each year. Applications will be assessed for compliance against this guideline and the relevant policy, and forwarded to the Executive Director: People, Talent and Culture for approval and reimbursement.

Study costs of successful applicants will be distributed equally, as a percentage of total costs claimed by successful applicants, via the University payroll system.

The complete procedure for applying for financial support and the application form is provided in Appendix 1.

### **5. 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.

## 6. RESPONSIBILITIES AND AUTHORITIES

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

## 7. CROSS REFERENCES

- [HRIS 031 – Financial Support Application](#)
- [HR 25.1 - Performance Management Policy](#)
- [A-31.2 - Academic staff enrolled in University Programs](#)
- [Guidelines for academic staff for the commencement and completion of doctoral qualifications](#)
- [University of South Australia Enterprise Agreement 2014](#)
- [HR 6.4 - Staff Appeals](#)

## 8. FURTHER ASSISTANCE

Management and staff may seek further advice from:

- The local [HR contact](#)
- The Human Resources Unit
- The Human Resources Website

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## **APPENDIX 1: APPLYING FOR FINANCIAL SUPPORT**

### **1. Call for applications**

Claims for study successfully completed in the academic year prior are submitted to the Study Assistance Committee for retrospective reimbursement, and must be received by the last business day of February each year.

The formal invitation for staff to submit an application for financial support is made via the UniSA all staff announcements in January of each year.

Claims will not be backdated for study in previous academic years.

### **2. Submitting an application**

When preparing an application for financial support, staff members must complete the HRIS 031 Financial Support Application form and forward it, with relevant documentation, to their supervisor for approval. Relevant documentation includes:

- Document 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
- Evidence of supervisor 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

The supervisor either recommends or does not recommend the application.

Approved applications are forwarded to the senior manager for secondary approval.

If the application is not approved the senior manager will outline the reason in writing to the staff member concerned.

In this context, 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 e.g., Head of School, Research Institute Director, Unit Director, Division Manager.

Once approved, the completed application form is sent directly to:

Study Assistance Committee  
HR Unit  
Level 3, 101 Currie Street

### **3. Confirmation of receipt of application**

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

### **4. Reimbursements**

The Study Assistance Committee will meet to consider applications and make recommendations to the Executive Director: People, Talent and Culture.

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