

## General Staff Educational Assistance Scheme

<b>Approving authority</b>	Executive Group
<b>Approval date</b>	15 March 2017
<b>Advisor</b>	For advice on this policy, contact <a href="#">HR Advisory Services</a>   Human Resources
<b>Next scheduled review</b>	2021
<b>Document URL</b>	<a href="http://policies.griffith.edu.au/pdf/General%20Staff%20Educational%20Assistance%20Scheme.pdf">http://policies.griffith.edu.au/pdf/General Staff Educational Assistance Scheme.pdf</a>
<b>TRIM document</b>	2017/0000387
<b>Description</b>	This procedure outlines information for staff, supervisors and Heads of Element in relation to the educational assistance program including the categories of educational assistance and the types of assistance (financial and non-financial) that may be available.

### Related documents

[Code of Conduct](#)

[General Staff Educational Assistance Scheme Application Form](#)

[Individual Grievance Resolution Procedure](#)

[Overpayments Recovery Procedure](#)

[Staffing Delegations: Academic Groups](#)

[Staffing Delegations: Administrative Divisions](#)

[\[Introduction\]](#) [\[Scope\]](#) [\[Application Process\]](#) [\[Categories of Educational Assistance\]](#) [\[Types of Educational Assistance\]](#) [\[Educational Assistance Allowance Payments\]](#) [\[Delegation of Authority\]](#)

## 1. INTRODUCTION

The University is committed to attracting and retaining talented people and to providing a working environment that enables staff to develop their skills and capabilities through continuing study at recognised institutions, where such studies will be of benefit to both the University and the staff member.

This procedure outlines information for staff, supervisors and Heads of Element in relation to the educational assistance program including the categories of educational assistance and the types of assistance (financial and non-financial) that may be available.

The following types of formal education programs are eligible for educational assistance under this scheme:

- undergraduate and postgraduate programs;
- course or program of study at TAFE/VET institutions;
- commercial and advanced trade courses which are offered by accredited training institutions; and
- in exceptional cases, staff may be eligible for assistance in undertaking a higher degree research (HDR) program.

## 2. SCOPE

Full-time continuing and fixed-term general staff members with appointment terms of 12 months or more are eligible to apply for educational assistance.

Part-time and fractional continuing and fixed-term general staff with appointment terms of 12 months or more are eligible to apply for educational support on a pro-rata basis.

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## 3. APPLICATION PROCESS

Staff wishing to undertake study and claim educational assistance must apply each year using the [General Staff Educational Assistance Scheme Application Form](#) for approval of a course or program of study prior to enrolment.

Applications are to be submitted to the staff member's supervisor for recommendation to the Head of Element no later than four weeks prior to the commencement of study.

Applications are only valid for a period of one year or for the duration of the course or program of study, whichever is the lesser. Staff members who require assistance for more than one year must submit an application for educational assistance each year.

Applications are considered on a case by case basis. The criteria used to determine the level and type of study assistance to be granted is subject to an assessment including the following:

- the relevance of the proposed course or program of study to the staff member's current position and duties or anticipated duties;
- balancing the professional development needs of the individual with the needs of the work unit and University;
- the staff member's record of performance at the University, existing qualifications, and record of success in previous applications for educational assistance under this or similar schemes;
- the operational controls and available resources within the staff member's work unit as determined by the Head of Element; and
- consideration of all applications consistent with the University's equity and diversity goals.

In considering applications for educational assistance in accordance with the above criteria, the Head of Element may:

- approve the application in full (except the approval of assistance to undertake an HDR program which requires endorsement by the Director, HR);
- approve the application in part (for e.g., approve only some of the forms of non-financial assistance requested); or
- not approve the application.

In approving an application for educational assistance, the Head of Element agrees to administer the general staff educational assistance scheme for participating staff, to meet any costs associated with approval and the payment of assistance as detailed under [6. Educational Assistance Allowance Payments](#), and to monitor the staff member's use of the forms of assistance provided.

For approved applications, it is the staff member's responsibility to follow the requirements of the enrolling institution, to notify the supervisor of a change in circumstances (such as withdrawing or discontinuing the course or program of study), and as soon as possible after the results are known, to provide their supervisor with documentary evidence of completion of the courses/program of study undertaken. Such evidence may include: Statement of Results, or for HDR students, an Annual Progress Report or statement from their research supervisor.

Educational assistance in the form of financial assistance will not be paid in the following circumstances:

- where full fees are paid through a scholarship, bursary or similar;

- where a staff member has been unsuccessful in completing a course or program of study;
- for a repeat course or program of study that had previously been approved for educational assistance under this or similar scheme;
- where a staff member has discontinued or withdrawn from the course or program of study; and
- on notification of cessation of employment with the University. A staff member may be required to refund the full amount of the education allowance received in the last 12 months of study, unless an exemption has been granted by the Director, Human Resources.

Where an application for educational assistance has not been approved, the staff member will be given the opportunity to discuss the outcome with their supervisor. In the event that a dispute arises, the parties must follow the relevant steps detailed in the University's [Individual Grievance Resolution Procedure](#).

#### 4. CATEGORIES OF EDUCATIONAL ASSISTANCE

Applications for educational assistance are categorised under the following criteria in order to determine the types of study assistance offered to approved staff.

Category	Description
A	applies where a staff member is required to enrol in a particular course or program of study as a condition of employment. This condition will be explicitly stated in the staff member's written offer of employment or is confirmed by HR.
B	applies where the course or program of study will directly contribute to the staff member's performance of current or anticipated duties, identified from a consultative process, such as the performance review and development process. Category B status is awarded where: <ul style="list-style-type: none"> <li>• courses or programs of study with undergraduate status or lower, 50% of course content directly relates to the staff member's current or anticipated duties;</li> <li>• postgraduate and second degree courses or programs of study, 75% of course content directly relates to the staff member's current or anticipated duties.</li> </ul>
C	Applies where the course or program of study is of a general nature, not directly related to the specific employment of the staff member, but is relevant to other positions at the University and contributes to the continuing development of the staff member.

#### 5. TYPES OF EDUCATIONAL ASSISTANCE

The general staff educational assistance scheme provides a broad range of support that may be available to approved staff members and may include financial and non-financial assistance. Non-financial assistance may include, but not be limited to: paid work time to attend lectures/tutorials/workshops, exams, compulsory residential schools or mandatory inductions; and reasonable access to resources such as photocopying, printing and computing facilities.

The educational assistance allowance is available to approved staff members to cover in part, ongoing education expenses for formal education programs (such as degrees etc.), contributions towards course or program fees, student services and amenities charges, text books and other miscellaneous costs and demonstrates the University's commitment to supporting the development of its staff.

The types of assistance available is based on the approved category of educational assistance and is normally provided as a package. There may be a variance in the maximum level of all types of assistance available in all categories as determined by the relevant Head of Element.

The package of assistance is based on a normal University part-time study load, that is normally two courses (2 x 10CP) per semester, and staff who complete more than the normal load (e.g. study full-time) will have their application for assistance considered at the normal rate. Staff who undertake less than the normal study load (e.g. 1 x 10CP) will be considered for assistance on a pro-rata basis.

Category	Description
A	<p>Financial Assistance:</p> <ul style="list-style-type: none"> <li>• up to 100% of up-front course or program fees will only be considered if study is undertaken at the University, except where the course or program of study is not offered by the University. In cases where part or full course or program fees for University courses is approved, the Element will be required to arrange payment under an <a href="#">Internal Scholarship/Sponsorship</a> via Finance;</li> <li>• in all other cases, maximum expenditure of up to \$2,500 as an education allowance payment in any one year.</li> </ul> <p>Non-Financial Assistance:</p> <ul style="list-style-type: none"> <li>• subject to approval, assistance may be granted to attend required lectures/tutorials/workshops, residential school or other mandatory attendance components or other class-based teaching activities that are only available in standard work hours for up to 50% of the required time. The remainder of time is to be made up from the staff member's existing leave entitlements, flexi-time, unpaid leave or other acceptable arrangements.</li> </ul> <p>In exceptional circumstances, the Head of Element may approve time off with pay for more than the maximum 50% standard. Leave without pay may be available for full-time study or to complete a research based project and is to be negotiated within the Element.</p> <ul style="list-style-type: none"> <li>• flexibility in working hours to accommodate attendance at lectures/tutorials/workshops, where those activities conflict with normal working hours and can be reasonably accommodated by the work unit;</li> <li>• flexi-time leave for study prior to an exam or other form of compulsory assessment activity;</li> <li>• paid work time and reasonable travel time to attend exams and/or other forms of mandatory assessment requiring attendance; and</li> <li>• access to reasonable computing, printing and photocopying facilities.</li> </ul> <p>In exceptional circumstances, and where the University deems a course or program of study essential to the requirements of the staff member's role, the Head of Element may forward a submission (on behalf of the staff member) recommending full-time study release on full or part-pay to the relevant senior officer for approval.</p>
B	<p>Financial Assistance:</p> <ul style="list-style-type: none"> <li>• maximum expenditure of \$2,000 as an education allowance payment in any one year. Preference is given to study undertaken at the University, except where the course or program of study is not offered by the University.</li> </ul> <p>Non-Financial Assistance:</p> <ul style="list-style-type: none"> <li>• subject to approval, assistance may be granted to attend required lectures/tutorials/workshops, residential school or other mandatory attendance components or other class-based teaching activities that are only available in standard work hours for up to 33% of the required time. The remainder of time</li> </ul>

Category	Description
	<p>is to be made up from the staff member's existing leave entitlements, flexi-time, unpaid leave or other acceptable arrangements.</p> <p>Leave without pay may be available for full-time study or to complete a research based project and is to be negotiated within the Element.</p> <ul style="list-style-type: none"> <li>• flexibility in working hours to accommodate attendance at lectures/tutorials/workshops, where those activities conflict with normal working hours and can be reasonably accommodated by the work unit;</li> <li>• flexi-time leave for study prior to an exam or other form of compulsory assessment activity;</li> <li>• paid work time and reasonable travel time to attend exams and/or other forms of mandatory assessment requiring attendance; and</li> <li>• access to reasonable computing, printing and photocopying facilities.</li> </ul>
C	<p>Financial Assistance:</p> <ul style="list-style-type: none"> <li>• maximum expenditure of \$1,500 as an education allowance payment in any one year. Preference is given to study undertaken at the University, except where the course or program of study is not offered by the University.</li> </ul> <p>Non-Financial Assistance:</p> <ul style="list-style-type: none"> <li>• approved leave (either with or without pay) to attend lectures/workshops/tutorials, residential school or other mandatory attendance components for up to three hours per week or by negotiation for longer periods;</li> <li>• flexibility in working hours to accommodate attendance at teaching and assessment activities that require attendance;</li> <li>• flexi-time leave for study prior to an exam or other form of compulsory assessment activity;</li> <li>• paid work time and reasonable travel time to attend exams and/or other forms of mandatory assessment requiring attendance; and</li> <li>• limited access to reasonable computing, printing and photocopying facilities.</li> </ul>

## 6. EDUCATIONAL ASSISTANCE ALLOWANCE PAYMENTS

An approved educational assistance allowance is paid to a staff member as a one-off payment after the census date (each semester or trimester) of an approved course or program of study. Human Resources is responsible for processing approved educational assistance allowance payments (except for course or program fees which are managed under an [Internal Scholarship/Sponsorship](#) via Finance.

The University does not require the production of invoices or receipts associated with a course or program of study in order to pay the approved education allowance, except in the case of Category A approvals where the University may be paying part or full fees for a course or program of study offered at the University or elsewhere.

In the event that a staff member is transferred to another budget element during the course of their approved educational assistance entitlement, they will continue to have the financial component of their approval met by the approving budget element until the expiry of approval. The staff member will be required to negotiate the non-financial assistance requirements with the new budget area prior to, or at the time of, transfer.

## 7. DELEGATION OF AUTHORITY

Approval for the category and type of educational assistance is undertaken in accordance with the [Staffing Delegations: Academic Groups](#) and [Staffing Delegations: Administrative Divisions](#).