<table>
<thead>
<tr>
<th>Procedure Title</th>
<th>Staff study support</th>
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<tbody>
<tr>
<td>Parent Policy</td>
<td>Staff Development Policy</td>
</tr>
<tr>
<td>Date Effective</td>
<td>25 September 2017</td>
</tr>
<tr>
<td>Review Date</td>
<td>3 years from effective date</td>
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<tr>
<td>Procedure Owner</td>
<td>Chief Human Resources Officer</td>
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<tr>
<td>Category</td>
<td>Human Resources</td>
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<tr>
<td>Version Number</td>
<td>4</td>
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<tr>
<td>Content Enquiries</td>
<td>ask.monash or phone Monash HR on 990 20400</td>
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<tr>
<td>Scope</td>
<td>This procedure applies to full-time and part-time, continuing and fixed-term staff at all Australian campuses who have completed a minimum of one year's service. Sessional and casual staff are not eligible for staff study support.</td>
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<tr>
<td>Purpose</td>
<td>The University may provide payment of study fees, study leave and/or reimbursement of other study-related expenses and benefits (staff study support) to eligible staff who undertake an approved study course of relevance and benefit to their role and future career at the University. Staff study support may also be offered as an incentive to attract quality staff at the time of appointment, however payment of fees cannot commence until after the staff member has completed a full year of service. The purpose of this procedure is to clarify the application of staff study support as it applies to eligible staff and to provide the pathways to apply for and to administer the procedure.</td>
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**PROCEDURE STATEMENT**

1. **Conditions of Staff Study Support**
   1.1. Eligible staff who are accepted into an approved study course may apply for the following forms of staff study support:
       - for an approved study course at the University, upfront payment by the University up to $6,000 per annum (including the student amenities fee);
       - for an approved study course at an external institution, reimbursement of course fees up to $6,000 per annum;
       - study leave; and/or
       - reimbursement of other study-related expenses and benefits.
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1.2. Eligible staff who are undertaking study that is not an approved study course may apply for study leave providing the course:
   - relates to the staff member’s current role and future development; and
   - is reflected in the staff member’s performance plan.

1.3. The staff member will be required to apply for staff study support each year preferably at the beginning of the year during the performance planning discussion. The agreement on staff study support can be for the duration of the year, or made on a semester-by-semester basis.

1.4. All staff study support must be agreed with the performance supervisor and the head of unit and approved by the dean, executive director or delegate as outlined below.

1.5. In the event that a staff member undertaking an approved study course at the University does not pass a subject(s), the staff member will be required to pay the cost of repeating the subject(s). If a staff member who is undertaking an approved study course at an external institution does not pass a subject(s), the staff member will not be entitled to claim reimbursement for the cost of that subject(s). If the staff member does not re-enrol in the subject, the staff member will be required to reimburse the University for the amount paid by the University towards the cost of the course.

1.6. In agreeing to staff study support, the staff member will commit to remaining in the employ of the University for at least one year after the completion of any subjects which form part of the approved study course. Where a staff member departs the University without discharging the required commitment, then the staff member will be required to repay the amount of fees paid by the University for the current and previous year. If a staff member’s employment ceases due to the expiry of their contract or the University terminating their employment (other than on the grounds of unsatisfactory performance and/or misconduct), the condition of discharging their commitment to the University will not apply.

2. Application Process

Step 1: The staff member and performance supervisor discuss the staff study support

2.1. The staff member will:
   - discuss the proposed course of study, anticipated time commitment and the support they are seeking with the performance supervisor; and
   - confirm eligibility to receive staff study support with their performance supervisor.

2.2. The performance supervisor may:
   - seek advice from the HR Business Partner on the staff study support; and
   - check with Access HR on 9902 0400 to ensure that an entitlement to apply exists.

2.3. If the performance supervisor agrees that the course is of relevance and benefit to the staff member and the work unit, or University, the staff member should update their performance and development plan to reflect the intended course of study.
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Step 2: The staff member applies for the approved study course

2.4. If the staff member has not previously been accepted into the study course, the staff member will then apply for the study course as agreed with the performance supervisor via the normal application process.

2.5. Note that applications are subject to the regular entry requirements and a full fee place being available. The performance supervisor should ensure that the staff member understands that at this stage no firm commitment to the study has been made by the University.

Step 3: The staff member applies for staff study support

2.6. The staff member will advise the performance supervisor if accepted into the course and provide the performance supervisor with a draft Staff Study Support Application Form. The Staff Study Support Application Form will include details of the amount of payment/reimbursement the staff member is applying for, an estimate of the amount of study leave and any other study-related expenses and benefits sought.

2.7. The performance supervisor will review the form and, in consultation with the staff member, will finalise the application.

Step 4: The staff member seeks approval for the staff study support

2.8. The staff member will submit the Staff Study Support Application Form to the head of unit who will consider the application. If agreed, the head of unit will sign the Staff Study Support Application Form acknowledging their support for the application.

2.9. The head of unit will then submit the completed Staff Study Support Application Form to the dean, executive director or delegate for approval.

2.10. The dean, executive director or delegate will make a decision to support, to amend or to reject the application and will notify the head of unit. In amending an application, the dean or executive director may agree to only some parts of the application or may suggest an alternative arrangement.

- If approved, the Staff Study Support Application Form will be signed by the dean, executive director or delegate and forwarded for processing to the HR Operations Centre.

- If amended, the Staff Study Support Application Form will be returned to the head of unit for discussion with the staff member and performance supervisor.

- If rejected, the dean, executive director or delegate will provide the necessary information giving grounds for the rejection to the head of unit for communication to the performance supervisor and staff member.

Step 5: Monash HR records the approved study course and arranges for the fees to be paid for courses at the University

2.11. For approved study courses at the University, the HR Operations Centre will record the relevant cost center and fund details on the approved Staff Study Support Application Form. The HR Operations Centre will then email a copy of the form to the Fees Unit so that the Fees Unit can assign the approved fees (to a maximum of $6,000 per annum) to the faculty or division.
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2.12. The HR Operations Centre will also ensure that all approved Staff Study Support Application Forms are sent to Payroll Services for processing. The approved study course will be recorded in SAP and the form will be placed on the staff member's personnel file.

Step 6: The staff member enrolls in the approved study course

2.13. The staff member will then enrol in the approved study course.
- If the approved study course is at the University, the staff member will enrol via WES and the amount approved for payment by the University will be automatically assigned by the Fees Unit to the relevant faculty or division cost center and fund (and sent to the head of unit for approval). The remainder of the fees will be invoiced to the staff member for payment.
- If the approved study course is external to the University, the staff member will pay the course fees (subject to the normal rules relating to the payment of fees) and seek reimbursement upon successful completion of the subject(s).

Step 7: The staff member applies for study leave through ESS

2.14. The staff member and supervisor will agree upfront to the estimated amount of study leave the staff member will take during the relevant period (see Step 3 above). This will be authorised by the head of unit and dean, executive director or delegate through the application process. However, the staff member will then need to apply for the leave directly through ESS.

2.15. In approving the study leave, the supervisor must ensure that the study leave is approved in accordance with the agreed parameters in the Staff Study Support Application Form.

Step 8: The staff member seeks reimbursement for an external approved study course or other study-related expenses and benefits

2.16. If the staff member has engaged in an approved study course at an external institution and/or has approved other study-related expenses and benefits that the staff member will be seeking reimbursement for, the staff member will make a claim for reimbursement of the expenses through Concur at the completion of the subject(s) (refer to the Reimbursement Procedures). The staff member must attach proof of successful completion of the subject(s) and relevant invoices to the claim(s).

Step 9: The performance supervisor reviews and monitors the staff member’s progress during the year

2.17. The performance supervisor will monitor and review the progress and achievements of the staff member in undertaking their studies during the course of the studies (as necessary) and at each performance review meeting.

3. Responsibilities

Staff member

3.1. The individual staff member is generally responsible for:
- identifying those subjects/courses that they wish to study and for identifying how those studies are connected with their work and career at the University;
- ensuring that they meet entrance requirements;
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- completing all course application requirements, including documentation;
- ascertaining accurate costs of the study and for making payments that are required during the course of the study; and
- providing documentation that supports their application for study support.

Performance supervisor

3.2. The performance supervisor is responsible for:
- discussing development plans with staff member(s) at performance review discussions;
- ensuring that the courses or subject(s) selected by staff member(s) are relevant to the work role and career aspirations of the staff member; and
- considering the operational needs of the work unit in agreeing to any study leave; and
- monitoring and reviewing staff progress toward study goals.

Head of unit

3.3. The head of unit or delegate is responsible for:
- examining and supporting the application of an individual;
- ensuring that the application is forwarded to the dean, executive director or delegate for consideration;
- ensuring that an individual is eligible for staff study support and that involvement in the study program will not adversely affect the operations of the department;
- considering additional study expenditures where these are consistent with budgets and this procedure; and
- ensuring financial officers are advised of the forward commitment to study support expenditures, where these are authorised.

Deans and executive directors

3.4. The dean and executive directors or delegate are responsible for providing information where an application for study support is not approved. They may also assist the head of unit to clarify why a request for study support has not been approved.

Monash HR Responsibilities

The HR Operations Centre

3.5. The HR Operations Centre is responsible for forwarding the completed Staff Study Support Program Form to Payroll Services.

Payroll Services

3.6. Payroll Services is responsible for recording the approved study course in SAP and including the completed form on the staff member's personnel file.
Responsibility for implementation

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<th>Status</th>
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Approval Body

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<td><strong>Author:</strong> Director, Workplace Relations</td>
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Operational procedure

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Definitions

**Approved study course:** includes all full-fee paying graduate or postgraduate studies offered by the University and which meet the FBT exemption criteria for self-education. Other types of study that may be accepted include studies at institutions other than the University where the course is not offered by the University or where the staff member has been unable to obtain a place in the same or similar course at the University. Studies at other institutions must meet criteria for relevance and benefit to the staff member's role and future related career at the University. Courses at other education institutions that may be considered include those at graduate and postgraduate level (but not normally doctoral courses), TAFE courses and accredited programs (such as those offered by professional institutions or private providers). Undergraduate courses are not considered approved study courses.

**Concur:** is the University's online expense management system. It is used for reimbursements and corporate credit card reconciliations.

**Continuing staff:** means staff members of the University engaged in full-time or fractional employment other than fixed-term, sessional or casual employment.

**Employee Self Service (ESS):** is the online Employee Self Service system which provides staff members with easy and private access to personal and current employment information held by the University.

**Fixed-term staff:** means staff members of the University engaged in fixed-term employment as defined under clause 16.4 of the Monash University Enterprise Agreement (Academic and Professional Staff) 2014, clause 18.1 of the Monash University Enterprise Agreement (Trades and Services Staff - Building and Metal Trades Staff) 2009, and clause 18.1 of the Monash University Enterprise Agreement (Trades and Services Staff - Catering and Retail, Cleaning and Caretaking, and Miscellaneous Services Staff) 2005.

**Fringe benefits tax (FBT) exemption:** FBT is a tax levied by the federal government on an employer that is designed to tax many of those benefits that an employee receives outside their normal taxable income. To avoid FBT requirements the course that an individual seeks to study must be a full fee paying course and not HELP (HECS) funded and be related to the individual's employment and related career.

**HELP (and HECS):** is a loan available to eligible students enrolled in Commonwealth supported places. A HECS-HELP loan covers all or part of the student contribution amount and is subject to Fringe Benefits Tax. The University will not provide reimbursement of HECS and HELP payments and debt.
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HR Business Partner: is a key member of the Monash HR Business Partnering community and provides strategic advice, guidance and solutions that underpin key client goals, HR strategy and organisational vision to a particular client group.

HR Operations Centre: is a centralised HR team that brings together the HR Advisory, HR Business Support and HR Recruitment Support functions. The HR Operations Centre delivers a broad range of HR operational services at all stages of the employee lifecycle including recruitment and appointment of staff, staff enquiries and contract renewals.

Other study related expenses and benefits: include text books and other study materials that may be reimbursed at the discretion of the head of unit. Staff are required to pay for these expenses and seek reimbursement at the end of the semester upon presentation of successful completion of subject(s) and a tax compliant receipt, evidencing payment of the expenses. Staff will not be reimbursed for computers, notebooks, stationery and any travel expenses associated with undertaking the course of study.

Payroll Services: is the Centre of Expertise in Monash HR which manages the payroll and related services.

Study leave: is leave that is provided by the University to staff for the purpose of attending approved courses of study and related examinations.

The period of study leave available for staff members employed for at least 0.5 full-time equivalent is up to 4 hours per week, and this may be taken in an accumulated form of larger blocks of time provided that this is agreed with the performance supervisor and approved by the head of the unit and dean, executive director or delegate in accordance with the requirements of this procedure. Study leave may only be used for study purposes.

WES (Web Enrolment System): is the University's online student enrolment system.

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<th>Legislation Mandating Compliance</th>
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<td>- Performance development process: academic staff procedure</td>
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<td>- Salary Packaging procedure</td>
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**EA Agreements**

Monash University Enterprise Agreement (Academic and Professional Staff) 2014

- clause 40 - Other Leave
- clause 64 - Performance Development
- Monash University Enterprise Bargaining Agreement (Trades and Services Staff - Building and Metal Trades Staff) 2009
- clause 25 - Performance Enhancement
- clause 57 - Training
- Monash University Enterprise Agreement (Trades and Services staff - Catering and Retail, Cleaning and Caretaking, and Miscellaneous Services Staff) 2005
- clause 26 - Performance Enhancement
- clause 48 - Training
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<th>Documents</th>
<th>Fringe benefits tax: a guide for employers</th>
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<tr>
<td>Forms</td>
<td>Staff Study Support Application Form</td>
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### SCHEDULE(S)

Additional mandatory requirements specific to a Faculty or Offshore location [Education](#) procedure

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