

OUTSIDE STUDY PROGRAM (OSP) PROCEDURE

SCOPE

This procedure applies to all fixed term and continuing academic staff of the University who meet the eligibility criteria and herein are collectively referred to as 'you' for the purpose of this procedure.

This procedure does not apply to casual, sessional, adjunct and conjoint appointees.

For the purpose of this procedure, references to 'the University' includes staff in Australia and Malaysia and is hereinafter referred to as 'us', 'our' or 'we'.

PROCEDURE STATEMENT

The [Outside Study Program](#) (OSP) provides you with a period of release from normal academic duties to undertake research, education and engagement, while being paid your substantive salary. It is a planned program of work which is intended to align with the strategic direction of the University, Faculty and Unit, in order for you to make a significant contribution to that strategic direction.

It is also intended to:

- enhance personal scholarly development, knowledge, skills and experience in our academic discipline;
- provide access to resources;
- build deep and extensive engagement in national and international partnerships and collaborations with industry, government, non-government organisations and/or other universities;
- contribute to excellence in research and education;
- enhance the standing of the Faculty, the Unit and yourself; and
- increase the international and domestic standing of the University.

OSP may be undertaken locally or internationally and is normally up to a six (6) month uninterrupted period and free from your regular University duties. It is an approved program of work which is unable to be undertaken during the course of your regular duties. OSP is not leave and you are still employed by the University whilst on OSP. As you remain an employee of the University during your OSP, you are required to continue to comply with University policies, procedures and related documents.

OSP is a competitive application process and approval is not automatic, even if you meet the eligibility criteria. The number of applications approved in a calendar year may be limited by the funds available, and depend upon the nature of the applications received.

1. Eligibility

1.1 You are eligible to apply for OSP if you are an academic staff member and:

Type of Application	Conditions	
First OSP Application	You have completed 3 years of continuous service at the time of your first OSP period commencing, unless otherwise agreed in accordance with your contract of employment. Note: two years' continuous service where prior service has been formally recognised – refer clause 1.5.	You are meeting the minimum requirements of the academic performance framework and you have a current and approved myPlan/PDP in place.
Second or subsequent application	At the time of your proposed OSP commencing, you have completed 3 years of continuous service since concluding your last period of OSP.	

1.2 You may not be eligible if you:

- are under a formal performance management/improvement plan;
- have breached our Responsible Conduct of Research and associated Policies;
- have breached our Ethics Statement policy; or
- are under formal investigation.

1.3 Deans, Associate Deans and Heads of Unit (incl Heads of School and Deputy Heads of School in Malaysia) would not normally participate in OSP during the term of their office, except under special circumstances where a suitable deputy available.

Note: Special consideration for OSP will be given following the completion of the term of office.

1.4 The University will consider your OSP application if you are a grant supported staff member where the funding rules of the research grant permit and the department or administrative unit approves the required funding.

Prior service recognition

1.5 For staff in Australia, the University will recognise continuous previous paid full-time or part-time prior service with other Australian higher education institutions as qualifying service when considering an application for OSP. Eligibility for recognition of service will depend on continuity of employment between the other institution and the Monash and does not apply if you were paid from external funds.

Note: Further details about prior service recognition and OSP can be found in the Enterprise Agreement.

PhD work

1.6 OSP will not be used to undertake study for fulfilment of a University degree.

2. Application process

2.1 Applications can be submitted during the annual designated period (as communicated by the University) for OSP commencing in the following calendar year.

2.2 Consult with your performance supervisor and Head of Unit to discuss your intention to apply for OSP and make a record of this conversation in your performance development plan.

2.3 Your application for OSP should comprise:

- a completed [OSP application form \(Australia\)](#) / [OSP application form \(Malaysia\)](#);
- a copy of your report (including outcomes) from any previous OSP (where relevant);
- research achievement record (generated by your faculty or school research office);
- a summary of your SETUs and peer review of teaching (if applicable) (min 1 year - max 3 years);
- any faculty or school specific required documents (if applicable); and
- up to 5 pages of supporting evidence.

For example, but is not limited to: invitation letters, appropriate contract, collaborative agreements/plans.

Note: your CV is not required

2.4 In special circumstances, applications for a maximum period of 12 months (including other periods of approved leave) may be considered, however they would need to demonstrate a significant benefit to the University.

2.5 Other relevant information you should address in your application should include:

Achievement(s) relative to opportunity	<p>An evaluative framework in which the overall quality and impact of achievements is given more weight than the quantity, rate or breadth of particular achievements. Assessing achievements relative to opportunity involves considering circumstances, arrangements, career histories and overall time available. This in turn allows appropriate evaluation of achievements in relation to:</p> <ul style="list-style-type: none">• the quantum or rate of productivity,• the opportunity to participate in certain types of activities, and• the consistency of activities or output over the period of consideration. <p>Achievement relative to opportunity is a positive acknowledgement of what a person can and has achieved given the opportunities available and is not about providing “special consideration” or expecting lesser standards of performance.</p>
Relevant circumstances	<p>We encourage you to include any relevant circumstances, which may facilitate an assessment of your achievements relative to opportunity.</p>

Annual leave	<p>You are required to include your proposed annual leave during the OSP period.</p> <p>This should include a minimum of 10 days of annual leave (or pro-rata for part-time), which is normally accrued in a six-month period (pro rata for part-time staff). If your OSP application is approved, Monash HR will process this leave directly from your application form and staff in Malaysia must submit their leave application via ESS.</p> <p>For staff in Australia with annual leave balances nearing 30 days (or pro-rata for part time staff) you must either take annual leave prior to commencing OSP and/or incorporate annual leave into your OSP period prior to returning to your normal duties. Please refer to the Annual leave procedure for further information.</p>
Travel grants	<p>You can apply for a travel grant relating to your OSP in the following circumstances:</p> <ul style="list-style-type: none"> ● up to \$5,500 for overseas OSP components (excluding New Zealand); or ● up to \$2,500 for OSP wholly undertaken within New Zealand/Australia but outside of Melbourne; or ● up to RM 15,000 for international OSP (Malaysia); or ● up to RM 10,000 for local OSP (Malaysia); or ● as otherwise determined by your Faculty Dean (or authorised budget approver). <p>You are required to include an estimate of travel expenses at standard University rates in your application.</p> <p>The OSP Committee will consider your likely reasonable expenses and estimate of expenditure to determine the amount of each individual grant.</p> <p>Travel grants are normally paid through the University's payroll system in Australia or via Finance in Malaysia the pay period before the OSP, however your Dean (Head of School in Malaysia) may approve to release the funds earlier upon request.</p> <p>Note: You must obtain your own independent financial advice to determine if tax implications apply. All University funded travel must comply with the relevant University travel policies and procedures.</p>

Supervisor and Head of Unit Recommendation (Head of School for Malaysia)

2.6 Your performance supervisor will make a recommendation to the Head of Unit (Head of School in Malaysia) and OSP Committee as part of the competitive process. In making their recommendation they will consider:

- whether the projected outcomes and academic content of the proposed program of work will benefit you and the University, in terms of research and scholarly activity and provide significant benefit including improvements in research and/or teaching;
- whether you have developed a workload plan that has included OSP for this period and you are meeting the required performance standards (relative to opportunity);
- that the proposed program justifies the OSP period requested;
- whether your teaching and other duties (e.g. HDR supervisions) can be covered without unreasonable additional duties for other academic staff;
- timing of leave causes minimum disruption;
- appropriate annual leave is included during the period of OSP;
- whether you will continue in the recognised service of the University; and
- whether you meet the eligibility criteria.

2.7 In making a recommendation, the Head of Unit will attest that:

- outcomes of any previous OSPs have been considered in recommending the current application;
- your workload can be covered; and
- the academic obligations of the Unit, including teaching and assessment and that supervision of research students can be satisfactorily met during your absence.

Submit your application

2.8 The following steps are to be undertaken:

- Complete the application form.
- Obtain your performance supervisor and Head of Unit's recommendations and signatures.
- Submit the OSP application form with other relevant attachments by the closing date to:
 - [online](#) for staff in Australia
 - via email to MUM-Talent.Development@monash.edu for staff in Malaysia.

- 2.9 Monash HR will receive your application, conduct checks and forward the application to your Faculty/School representative. Incomplete applications will not be considered. It is your responsibility to ensure that your application is complete.
- 2.10 Where there is a formal process underway in accordance with 1.2, or there has been a previous adverse finding in accordance with item 1.2 above, your application will be removed by the University.

Late or out of round applications

- 2.11 Late or out of round applications will not ordinarily be accepted unless there are exceptional circumstances. Requests for late or out of round applications will need to be submitted to the Chair of the OSP Committee detailing your exceptional circumstances.

3. Application considered

- 3.1 During the competitive process of the OSP Committee reviewing applications they will consider the program of work proposed in reference to (but not limited to):
- alignment with the University, Faculty and Unit and strategy/objectives;
 - the opportunity to accelerate research;
 - the strength of the leadership component to advance the University;
 - to the potential elevate the performance of the individual;
 - the needs of the Unit/Faculty (e.g. staffing and budgetary constraints);
 - your capacity to use the opportunity effectively;
 - if the proposed travel is overseas or within Australia/Malaysia is appropriate to the OSP goals;
 - if you have a proven and sustained record of productivity, impact and excellence in research, education and engagement (as relevant), and are meeting the relevant academic performance standards for your current level; and
 - any relevant personal circumstances.
- 3.2 Normally, the OSP Committee meets in June/July each year to consider applications however this may differ from year to year and for your location.

Committee constitution

- 3.3 The Dean/ Head of School (Malaysia) will appoint the OSP Committee with a minimum of three members (including the Chair) and may appoint external members to the faculty as appropriate.
- 3.4 Non-Faculty applications – the Director of Institute/Centre is equivalent to the Dean for the purposes of forming the 'OSP Committee' (Institute or Centre Committee).
- 3.5 Non-faculty or school committees will include:
- the Director or equivalent (or nominee) as Chair; and
 - at least one invited senior academic staff member from a faculty or school.
- 3.6 The Chair must consider the gender makeup of the Committee with a minimum representation of one-third women and one-third men required. In exceptional circumstances the Chair may request the Provost and Senior Vice-President or Pro Vice Chancellor (Malaysia) vary or waive the requirement.

Decision making authority

- 3.7 The OSP Committee Chair or in Malaysia the Pro Vice Chancellor (Malaysia) is the final decision maker for OSP applications, taking into consideration the recommendations of OSP Committee members.
- 3.8 Where a Dean or Head of School (Malaysia) delegates the Chair responsibility, the Dean or Head of School (Malaysia) remains responsible for the decision of the nominee and any committee that they chair within the parameters of this procedure.

Conflict of interest

- 3.9 Potential, perceived or actual conflicts of interest must be declared to the Chair at the commencement of the OSP process. If a committee member is uncertain, advice should be sought from the Chair prior to the meeting.
- 3.10 The Chair is responsible for ensuring that no declared conflict of interest can influence or be perceived to influence the outcome of the application. The Chair shall require the committee member to withdraw from the committee's deliberations on any matter where a conflict of interest cannot be resolved.

3.11 Examples of conflicts of interest may include;

- a supervisory postgraduate studies relationship (past or present);
- a direct supervisory working relationship with the applicant;
- co-publishing or collaborating with the applicant;
- a mentoring or personal relationship with the applicant; and/or
- a material interest that may impact their ability to objectively perform in the role.

4. Application Outcome

4.1 Your Faculty Chair or School Chair (Malaysia) will notify you, your supervisor and Head of Unit the decision via email.

Successful outcome

4.2 Where your application is successful, you are required to adhere to your approved program of work as outlined in your outcome letter.

Unsuccessful outcome

4.3 Where your application is unsuccessful, you should seek feedback from the Chair before lodging a future application. Advice from the feedback should be included in your performance development plan to work towards.

Review of Outcome

4.4 A review of an unsuccessful outcome is permitted on the grounds of a procedural irregularity substantial enough to result in material disadvantage to you.

4.5 In the first instances, we recommend you seek advice from your Dean/Director or Head of School (Malaysia).

4.6 Where you would like to request a review, you must write to the Chair within seven (7) days of notification of the outcome. Your submission must demonstrate a procedural irregularity resulting in material disadvantage in the OSP decision. The OSP Committee will consider your request within twenty-one (21) days of receipt.

5. Administration of outcomes

5.1 In Australia, faculties are responsible for providing Monash HR (HR-OSP@monash.edu) with outcomes

5.2 In Malaysia, schools are responsible for providing Monash HR (MUM-Talent.Development@monash.edu) with outcomes.

6. OSP period

6.1 The following applies during your OSP period:

Performance development plan	Record your OSP objectives, supporting documentation and the outcomes in your performance development plan (myPlan/PDP).
Salary and superannuation	Your salary (and normal superannuation/statutory (Malaysia) contributions) will continue to be paid during the period of the OSP. If you received payment from an organisation other than the University, you are required to adhere to the Paid Outside Work Procedure (or equivalent procedure at Malaysia).
Travel grants and tax	Income tax is not deducted from the travel grant however, in Australia, we will record the grant as an allowance on your Australian annual payment summary as this is considered taxable income by the Australian Tax Office (ATO). In most cases OSP is deemed by the ATO to be work related and deductions for airfares, accommodation and incidental costs will offset against the taxable grant. You should maintain a travel diary and collect receipts for expenditure during the period of travel for your personal tax records. Travel grants in Malaysia are reimbursed through the Finance claim process . Note: You must obtain your own independent financial advice to determine if tax implications apply.

<p>WorkCover & personal accident insurance</p>	<p>Australian staff are covered by WorkCover insurance while on OSP.</p> <p>Under the Accident Compensation Act 1985 ("the Act"), you are entitled to claim compensation for an injury or illness arising out of or in the course of employment, whether in Victoria or outside Victoria.</p> <p>Monash maintains a Travel Insurance policy for short term business trips with a maximum duration of six months. The cover is in effect whilst you are travelling and residing outside Australia or Malaysia on authorised University business and includes associated holiday travel undertaken during the OSP. The policy is in force 24 hours a day until you return to your normal residence or place of employment.</p> <p>If you intend on staying in one country for a period exceeding six months, you should contact the Insurance Services Office.</p> <p>A Certificate of Insurance as evidence of personal accident insurance for visa or other purposes can be obtained online by completing the insurance travel request form on the insurance website.</p>
<p>International OSP</p>	<p>You are required to meet the entry and visa requirements of all countries you are visiting, transiting through or working in. Australian staff must ensure that they have a valid passport which is not due to expire within six months of the last day of planned travel. Refer to the International travel procedure for more information or contact the Monash HR Global Mobility team.</p>

7. Obligations following OSP

7.1 You are required to submit an acceptable written report which will be provided to your performance supervisor, Head of Unit, the Chair of the OSP Committee and the Dean (if the Chair is not the Dean). An acceptable report must outline:

- how any financial support provided was spent;
- whether and how the intent of participation in OSP, as detailed in your application, was achieved;
- how did the program of work align to enhance the standing of the University, the Faculty, the Unit and yourself; and
- other achievements during the program of work.

Acceptability of the report is determined by assessing the extent to which the report addresses the goals and strategic alignment as detailed in your OSP application.

[OSP Report - Australia](#)

[OSP Report - Malaysia](#)

7.2 The report must be submitted within two (2) months of returning from OSP. Your performance supervisor will review the report and confirm whether the objectives of the OSP have been achieved and the report is acceptable. Staff in Australia can lodge [online](#) and staff in Malaysia can email MUM-Talent.Development@monash.edu.

7.3 If you fail to submit an acceptable report within two (2) months of return:

- you may be required to reimburse funds received from the University in relation to the OSP;
- you will normally be ineligible to apply for a future OSP period; and
- you will normally be ineligible to apply for a future promotion.

7.4 Reports will be used in considering your eligibility for a future OSP. Future OSP applications will not be considered where a prior OSP report has not been submitted unless special circumstances apply and are determined by the Dean/Head of School (Malaysia) as acceptable.

7.5 You may be required to meet specific faculty/school obligations following a period of OSP. For example, deliver a presentation or speak at a seminar.

7.6 Evidence of a successful period of OSP may include:

- successful completion of high-quality research outputs;
- success in attaining a competitive grant or other forms of research income;
- development of sustained research partnerships/collaborations as evidenced by activities such as joint publications, joint research income and/or joint PhD supervision; or
- development of strategic learning or teaching initiatives that lead to significant and sustained programs of enhanced course viability and reputation.

Return to service requirement

- 7.7 Following a period of OSP you are required to continue in the employment of the University for a minimum period which is equivalent to the period of the OSP.
- 7.8 If you fail to return to employment or do not comply with the provisions of this procedure, you may be required to reimburse any salary or grant paid in association with the OSP. The amount to be repaid will be pro rata of the stipulated shortfall in service.

8. Other important matters

Changes to OSP post approval

- 8.1 Your performance supervisor or Head of Unit may approve minor changes such as travel date variances of up to 2 weeks. You must obtain written approval prior to the change coming into effect.
- 8.2 The relevant OSP Committee Chair (or nominee) will consider major changes as appropriate.
- Major changes may include (but are not limited to):
- deferment of OSP for a period of up to 12 months;
 - reduction of the international component of OSP (and consequent effect on the travel grant);
 - substantial changes in location for part of the period of OSP;
 - introduction of new initiatives (with new proposed outcomes) into the OSP;
 - omission of previous proposed elements of the OSP;
 - major variations to travel and accommodation arrangements (particularly those that are supported by OSP travel grants); and
 - receipt of additional income from the staff member's home school/department to support travel to conferences whilst on OSP.
- 8.3 To make major changes to your OSP, submit an [OSP Alteration Request](#) allowing sufficient time for the Chair and/or OSP Committee to consider your request.
- 8.4 Alterations to OSP dates or financial grants are to be provided to Monash HR, Australia (HR-OSP@monash.edu) or Monash HR, Malaysia (MUM-Talent.Development@monash.edu) at the earliest known time in order that accurate records and payroll can be maintained.

Deferment of OSP

- 8.5 In special circumstances, you can apply to defer the timing of your OSP period for up to 12 months by submitting an [OSP Alteration Request](#).
- 8.6 The OSP Committee Chair may approve a deferral of up to 12 months in consultation with you, your supervisor and the head of unit (where applicable). Deferrals of longer than 12 months will require a reapplication in a future OSP.
- 8.7 Where you have been requested by the University to withdraw or defer your OSP, and you have suffered financial loss as a result, you may apply for financial assistance. If there is a dispute over a financial claim, the matter will be submitted to the OSP Committee Chair for a decision.

Where your OSP has been deferred or cancelled, you may be required to return any travel grant monies paid to you by the University. Where your OSP has been deferred, payment will then occur at an appropriate time in accordance with this procedure.

Confidentiality and privacy

- 8.8 Confidentiality is required of all persons involved during and post the OSP process, which will be emphasised by the Chair at commencement of the meeting.
- 8.9 All materials are restricted to those directly involved in the assessment process. Following the final meeting, access to materials will be removed (and any hard copies must be returned).

9. Breach of procedure

- 9.1 The University treats any breach of policies or procedures seriously and encourages reporting of concerns about non-compliance and manages compliance in accordance with the applicable Enterprise Agreement, relevant instrument of appointment and/or applicable contract terms. A failure to comply with policies, procedures and schedules may result in action by the University. Such action may include disciplinary and other action up to and including potential termination of employment for employees and cessation of other engagements for other persons.

DEFINITIONS

Academic Performance Framework	A framework that articulates high level expectations for academic performance adopting a consistent approach across the three categories of Research, Education and Engagement, against which all academic performance will be measured. The Framework identifies criteria for each category and examples of evidence that help address achievement of each criteria. It encourages a focus on developing and demonstrating outcomes and/or impact across all categories and includes evidence of both quantifiable metrics and qualitative material. Faculty or discipline specific performance research standards include minimum and aspirational performance standards.
Achievement(s) relative to opportunity	Is an evaluative framework in which the overall quality and impact of achievements is given more weight than the quantity, rate or breadth of particular achievements. Assessing achievements relative to opportunity involves considering circumstances, arrangements, career histories and overall time available to the staff member. This in turn allows appropriate evaluation of achievements in relation to: <ul style="list-style-type: none"> the quantum or rate of productivity, the opportunity to participate in certain types of activities, and the consistency of activities or output over the period of consideration. Achievement relative to opportunity is a positive acknowledgement of what a staff member can and has achieved given the opportunities available and is not about providing “special consideration” or expecting lesser standards of performance.
Conflict of interest	Refers to a situation where a conflict arises for an individual between two competing interests. These are often, but not exclusively, interests of public duty versus private interests. This refers to a reasonably perceived, potential or actual conflict of interest. Conflicts of interest can involve financial or non-financial interests of the staff member, and the interests of a business partner or associate, family member, friend or person in a close personal relationship with the staff member. For further information refer to the Conflict of interest procedure.
Dean or director	The dean (including a director of institute or centre) or, where applicable, a person acting as his or her nominee. Even when responsibilities are delegated, the person remains responsible for the decision of the delegate and any committee chaired by the nominee under this procedure.
OSP Committee	The OSP Committee is responsible for receiving and considering applications for OSP as relevant to the staff member: <ul style="list-style-type: none"> Faculty OSP Committees (Australia) are normally chaired by the Dean/Director or their nominee School OSP Committee (Malaysia) are normally chaired by the Head of School or their nominee.
Faculty OSP Committee Chair or School OSP Committee Chair	Is the Dean or Head of School (Malaysia), however the Dean Head of School (Malaysia) may delegate responsibility. The Chair is the final decision maker for OSP applications, taking into consideration the recommendations of the OSP Committee members.
Head of unit	Head of an academic or administrative work unit, for example Head of School, Head of Department, or equivalent (incl Heads of School and Deputy Heads of School in Malaysia) or where applicable, a person acting as their nominee.
Institute/Centre	For the purposes of this procedure, reference to an Institute or Centre as those which are centrally reporting such as MSDI, MUARC or VBDI
myPlan/PDP	An online performance planning tool that supports academic staff and supervisors to manage the performance development cycle myPlan for Australian staff and PDP for Malaysian staff.
Performance development portfolio	Evidence or material that supports the staff member’s claims of progress made and goals achieved such as awards received, articles published, teaching evaluation results, books or chapters written and any other relevant evidence. These documents may be stored electronically within the Portfolio Attachments section of the staff member’s performance plan in myPlan/PDP.
Procedural irregularity	The University has not followed a process that is articulated in this procedure.

Pure (Australia only)	The University's research management software which provides information for Monash staff on their research grants, research agreements, research outputs and research achievements.
Relevant personal circumstances	May include family responsibilities (for example child rearing, elder-care, illness of a partner or dependent), a temporary or permanent disability, relevant cultural expectations or circumstances, periods of part-time working and/or absences due to ill-health or injury.

GOVERNANCE

Parent policy	Probation, performance and promotion
Supporting schedules	
Associated procedures	<ul style="list-style-type: none"> • Conflict of Interest • Paid Outside Work • Paid Outside Work (Malaysia) • Performance Development Process: Academic Staff • International travel (Australian-based staff)
Legislation mandating compliance	
Category	Operational
Approval	Chief Operating Officer – 9 June 2021
Endorsement	Provost & Senior Vice-President – 9 April 2021 Vice-Prost (Faculty and Graduate Affairs) – 30 March 2021
Procedure owner	Chief Human Resources Officer – 12 April 2021
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