

# Outside Studies Program (Higher Education) Procedure

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## Purpose

The purpose of this procedure is to describe how to apply for the Outside Studies Program OSP and how to select and approve OSP applications based on their merit.

1. The (OSP) is designed to support the continual professional development of academic staff in order to assist the University (FedUni) to attain its objectives.
2. OSP is designed to give members of the academic staff of the University the opportunity to undertake research, creative and professional activity or the scholarship of teaching in areas of identified strategic importance to the University and to the professional development of the employee, which cannot normally be undertaken within the employee's duties at the University.
3. OSP provides an employee with the opportunity, uninterrupted by teaching or other duties:
  - i. to undertake professional development relevant to research, teaching, the supervision of postgraduate students and/or professional or creative activity; and
  - ii. to do one of more of the following:
    - engage in research;
    - engage in the scholarship of teaching;

- maintain and improve professional and vocational knowledge;
  - engage in creative or performing arts practice;
  - obtain experience in the work for which the employee is preparing students; and/or
4. gain academic leadership and management experience.

## Scope

This procedure applies to academic staff who are applying for OSP, and staff involved in selecting or approving applications for OSP.

## Definitions

<b>Academic Staff:</b>	refers to the University staff who are employed at Academic Levels A to E.
<b>OSP:</b>	Outside Studies Program.
<b>The Supervisor:</b>	is the senior academic staff member to whom the member of academic staff reports.

## Actions

### Application and Advertising

1. The relevant Deputy Vice-Chancellor or Provost shall advise academic staff in their portfolio in February and July respectively of OSP opportunities in the Autumn and Spring semesters (teaching periods 1 and 3) of the following year for the purposes of:
  - a. re-stating the scheme's objectives;
  - b. advising that applications are to be submitted on the prescribed Application Form and accompanied by all documentation required by the guidelines; and
  - c. specifying the closing date for applications.
2. Applications shall close in **April and September** respectively for the Autumn and Spring semesters of the following year.
3. An employee seeking a period of OSP shall complete the prescribed Application Form and submit it to the Executive Dean or portfolio Associate Deputy Vice-Chancellor (ADVC). The form, along with all relevant supporting materials, must reach the Executive Dean or portfolio ADVC by the advertised closing date.

## Selection

### Eligibility

1. The following employees shall be eligible to participate in the OSP:
  - a. Continuing academic staff who have been employees of the University for three (3) or more years prior to the commencement date of the session for which application is being made, or who have been granted equivalent credit from another approved institution.
    - **NOTE:** *Academic staff appointed to a continuing position shall be eligible only after satisfactorily completing their Final Probationary Review.*

- b. Academic staff who have been employed on a fixed-term appointment of more than three (3) years prior to the commencement date of the session for which application is being made, or whose combined continuous fixed-term employment exceeds three (3) years.
    - **NOTE:** *The granting of OSP shall be conditional upon the employee satisfactorily completing their Final Probationary Review and being able to fulfil the requisite period of after-service prior to the expiration of their fixed-term appointment.*
  - c. An Executive Dean or portfolio ADVC shall be eligible to undertake OSP subject to the approval of a proposed program by the relevant Deputy Vice-Chancellor.
2. Eligibility to participate in the OSP is subject to satisfactory performance, as determined through the University's performance management process.
  3. OSP is normally a co-operative venture whereby employees assume additional teaching, administration or other responsibilities to enable other members of their area to have a period free of normal academic duties.
  4. Any eligible employee with at least three (3) years' service since the last day of return from an OSP, for which they have submitted a final report, may submit an application for an OSP and receive conditional approval. The OSP shall not commence, however, until at least four (4) years have elapsed since completing the last OSP.
  5. As appropriate, on taking up an appointment, an employee may apply to the relevant Deputy Vice-Chancellor for credit for OSP purposes, arising from immediate previous full-time employment in an Australian university or in an approved tertiary institution. Credit may be given where an employee can establish that service with the previous institution contributed to an eligibility for OSP but that such credit was not availed of by accepting an appointment with the University. Written proof that such credit has been granted must be submitted with the application.

## Conditions

The OSP may be undertaken in Australia or overseas for a period of up to six (6) months, normally no longer than one (1) semester. In special circumstances, a longer period may be approved.

An employee who is granted OSP shall, prior to departure or leave, complete a written undertaking to return to the service of the University, for a period equal to the duration of leave. In the event of that period of after-service not being completed due to the employee's departure from the University during the course of an OSP or during the prescribed period of after-service, FedUni shall be reimbursed on a *pro rata* basis an amount to the value of the grant funding provided and of any salary paid in advance and representing service not completed.

An employee shall not make any significant changes to an approved OSP without first obtaining written approval from the Executive Dean or portfolio ADVC and the relevant Deputy Vice-Chancellor.

Unless an employee has leave approved in addition to an OSP, the employee shall resume duty at the University, immediately following the end of the term of absence allowed under an approved OSP.

An employee shall, within two (2) months of resuming duty; submit a satisfactory report and statements of external grants, earnings and expenditure to the relevant Deputy Vice-Chancellor through their supervising officer and Executive Dean or portfolio ADVC. This documentation will be maintained by offices of the Deputy Vice-Chancellors and recorded on the staff file on the central system.

## Membership of the University Outside Studies Program Committee

The membership of the Academic Portfolio OSP Committee will be as follows:

- a. Executive Dean (Chair);
- b. Two (2) academic staff members of the Institute, nominated by the Executive Dean, at least one (1) of whom shall be a professor or associate professor; and

- c. A member of the professoriate external to the Institute.

The membership of the Research and Innovation Portfolio OSP Committee will be as follows:

- a. ADVC (Chair);
- b. Two (2) Research Centres Directors, nominated by the ADVC;
- c. A member of the professoriate external to the specific Research Centre of the applicant.

The membership of the Global and Engagement OSP Committee will be as follows:

- a. Dean of the Global Professional School (Chair);
- b. Two (2) academic staff members of the portfolio, nominated by the Dean, at least one (1) of whom shall be a professor or associate professor; and
- c. A member of the professoriate external to the Global Professional School.

The Committees must consider appropriate gender representation.

Once all recommendations have been received, the relevant Deputy Vice-Chancellors will meet to determine the successful applications. This meeting will be chaired by the Deputy Vice-Chancellors on a rotation basis, where necessary they will consult with the Executive Dean or portfolio ADVC.

## Terms of Reference

1. The terms of reference of the OSP Committees shall be to:
  - a. evaluate application for OSP and rank them in order of merit;
  - b. recommend to the relevant Deputy Vice-Chancellor;
  - c. review OSP reports and make recommendations to the Deputy Vice-Chancellor on their adequacy and promulgation within the University.
2. The Executive Dean or portfolio ADVC and the relevant Deputy Vice-Chancellor shall consult to provide feedback to unsuccessful applicants, on request, and/or to seek further clarification or resubmission of an application.

## Selection Criteria

1. An OSP proposal will be considered in relation to the following:
  - a. The needs of the University.

Applicants will be expected to show how their particular OSP proposal will assist the University and their portfolio to achieve the strategic objectives of the University and portfolio;
  - b. the potential professional development benefit expected to accrue from the OSP;
  - c. an assessment of the applicant's contribution to the University and the portfolio, the extent to which the applicant's OSP proposal supports the University's and portfolio's priorities and the capacity of the University to cover the applicant's workload.

In making this assessment, the OSP Committee shall consider as appropriate:

    - the applicant's teaching, research, publication record, artistic productions, consultancies, professional activities, scholarly activities and academic leadership roles;
    - the applicant's capacity to obtain benefit from the proposed OSP as evidenced, *inter alia*, by demonstrable academic or administrative developments resulting from any previous OSP;
    - the applicant's professional development needs; and
    - the location(s) of the proposed OSP, which may be undertaken either in Australia or overseas. An OSP application should indicate why the location chosen is the most appropriate for the proposed program and how such a program would be of demonstrable benefit to the University;

- d. The duration of the OSP.  
An OSP may be for any period up to a maximum of six (6) months, normally including no more than one (1) teaching semester. The amount of financial support will be proportionately adjusted for lesser periods of leave. In special circumstances, a longer period may be approved; and
  - e. the length of time since the applicant's last OSP and evidence of productive outcomes from that leave, including a final report.
2. As the main function of OSP is to support the continual professional development of academic staff and provide a period uninterrupted by teaching and other duties, the following activities will not normally be supported:
    - a. visiting a number of tertiary institutions for briefings about the applicant's specialisation; or
    - b. attending a conference or congress, including as an office-bearer or invited speaker.

## Financial Support

### Annual Budget

The funds available for OSP places will be determined in advance by the Deputy Vice-Chancellors as part of the annual operating budget of the University. This funding will be provided through an OSP levy on each relevant portfolio proportionate to their academic staff numbers. The total amount available and the amount an individual staff can apply for will be communicated with every call for applications.

The number of applications approved in a calendar year shall be limited by the funds available.

### Grant Funding

1. Staff proceeding on an OSP may apply for a grant towards the substantiated costs of undertaking the Outside Studies Program up to the maximum amount as detailed in the call for applications. Additionally, the employee's area may augment, from non-operating grant sources, the approved grant up to a further 25% of the approved amount.
2. In determining the amount of the grant, the following procedure shall apply:
  - a. Normally, no quantum of costs other than those substantiated at the time of application will qualify for the grant; it is recognised that the documentation details may vary between conditional and final approval stages.
  - b. Documentation should clearly identify supporting information relating to the person(s) and/or institution(s) to be visited, and should specifically relate to the needs of the OSP.
  - c. On returning to duty, the employee shall submit a substantiated statement of expenses to the Executive Dean or portfolio ADVc and to the relevant Deputy Vice-Chancellor.
  - d. To be eligible for a grant for a spouse and/or each dependent child, any such persons must accompany the employee for a continuous period of at least six (6) weeks during the OSP.
  - e. The term "spouse" shall include a partner where the employee certifies to FedUni that the partnership meets each of the following conditions for a *bona fide de facto* relationship, namely:
    - the relationship is publicly known and deemed to be permanent; and
    - the partners maintain a common household.
  - f. The term "dependent child" shall normally mean a child under 18 years of age who is wholly dependent on the employee.
  - g. If an employee receives remuneration by way of salary and/or allowances from sources outside FedUni in excess of their substantive salary, the grant payable in connection with the OSP to the employee and family may be reduced, in advance or retrospectively, at the discretion of the relevant Deputy Vice-Chancellor.
3. The grant shall be paid up to two (2) months prior to the commencement of the OSP.

4. An employee, on submission of a detailed statement of earnings and expenditure on return from an OSP, may apply to the relevant Deputy Vice-Chancellor for an adjustment of any grant withheld.
5. An OSP may be taken consecutively with an approved period of leave, namely annual leave, long service leave or special leave with or without pay. Leave must be approved by the employee's supervisor before the OSP commences, and submitted to People and Culture.
6. During the period of the OSP, an employee shall, subject to normal deductions, receive the amount of full salary, including any increments due. At the request of the employee to People and Culture, half of this amount will be payable as salary in fortnightly instalments, and half as an allowance. The allowance will be paid, on request, as a lump sum in advance, up to two (2) months prior to the commencement of the OSP.

## Living Away From Home Allowance

1. Employees may qualify to salary sacrifice amounts related to additional food and accommodation costs while away from their usual place of residence for work-related reasons such as professional development. Under FBT legislation, the Living Away From Home Allowance (LAFHA) is a fringe benefit; it is not an additional payment.
2. To request the Living Away from Home Allowance, the applicant needs to contact Financial Services who will calculate the fortnightly amount to be salary packaged based on the Australian Taxation Office's guidelines for reasonable food amounts for the number of adults and children living away from home and the amount stated on the rental agreement or invoice for accommodation.
3. Employees then need to complete and submit the "Salary Packaging Agreement and Authority" documentation.

## Approval

1. When recommending applications to the relevant Deputy Vice-Chancellor, the portfolio OSP Committee shall verify that:
  - a. applications have been submitted in the required format;
  - b. applicants meet the eligibility requirements as specified in the eligibility section of this procedure;
  - c. proposed absences of employees on an OSP in any semester will not exceed the limit set by the relevant Deputy Vice-Chancellor which would not normally be more than two employees per area; and
  - d. appropriate finance is available (through OSP annual budgetary allocations or from portfolio sources).
2. The role of the relevant Deputy Vice-Chancellor in the approval procedure involves:
  - a. collectively determining conditional approvals;
  - b. advising successful and unsuccessful applicants;
  - c. providing final approval, and
  - d. providing feedback to unsuccessful applicants.

## Conditions of Approval

1. When the portfolio OSP Committee has made its recommendations for OSP approval, the Deputy Vice-Chancellors shall determine conditional approvals.
2. At any time after receiving conditional approval, and normally no later than two (2) months prior to the proposed start of the OSP, the employee shall submit to the relevant Deputy Vice-Chancellor the following documentation:
  - a. evidence that all necessary arrangements have been made with the host institutions, corporations or individuals necessary to achieve the objectives of the OSP;
  - b. details of the person(s) accompanying the applicant during the period of the OSP, as well as substantiated costs and other *bona fide* expenses that need to be taken into account when finally confirming the grant funding;

- c. certification in respect of spouse or dependent's grants, and
  - d. a signed undertaking by the employee to return to the University after the OSP, in accordance with the conditions specified in the conditions section of this procedure.
3. When the material required, specified under Item 2 above, has been verified, the Deputy Vice-Chancellor shall determine final approval and notify the employee accordingly.
  4. If an employee wants to change the approved arrangements for an OSP, then he/she must first gain approval from the Deputy Vice-Chancellor on the recommendation of the Executive Dean or portfolio ADVC.
  5. If, for any reason, an employee decides to cancel their approved OSP, then he/she shall notify the Executive Dean or portfolio ADVC and the relevant Deputy Vice-Chancellor as soon as possible.

## Outside Studies Program Report, Abstract and Financial Statement

1. An employee shall, within two (2) months of resuming duty, submit a satisfactory report and statements of external grants, earnings and expenditures to the relevant Deputy Vice-Chancellor through their Executive Dean or portfolio ADVC.  
**NOTE:** This report and its abstract should be sufficiently detailed and informative to form the basis of an assessment of outcomes.
2. If an OSP report is not received three (3) months after the employee has resumed duty following the OSP leave, the employee will be notified by the relevant Deputy Vice-Chancellor that, unless a report is received within a further one (1) month (i.e. four months after the employee resumed duty) and, in the absence of any substantial unforeseen circumstances, the employee may be considered to be in breach of the policy and may be subject to disciplinary action.

## Responsibilities

The Deputy Vice-Chancellors are responsible for developing, reviewing and overseeing the policy, procedure and forms for the Outside Studies Program.

## Policy Base

- [People and Culture Policy](#)
- [Academic Governance Policy](#)

## Forms/Record Keeping

Title	Location	Responsible Officer	Minimum Retention Period
<i>Outside Studies Program Higher Education Application Form</i>	Personal File	Relevant Deputy Vice-Chancellor	5 years
<i>Salary Packaging Agreement and Authority.</i>	Personal File	Relevant Deputy Vice-Chancellor	5 years

### Forms.

- [Outside Studies Program Application Form](#) (DOCX 156.7kb)
- [Outside Studies Program Salary Packaging Agreement](#) (DOCX 158.1kb)

## Implementation

The [Outside Studies Program \(Higher Education\) Procedure](#) will be implemented throughout the University via:

1. an Announcement Notice under 'FedNews' on the 'FedUni' website and through the University Policy - 'Recently Approved Documents' and 'Policy Search' webpages to alert the University-wide community of the approved Procedure;
2. inclusion on the University's online Policy Library;and
3. a memorandum from the the Deputy Vice-Chancellors to all relevant leaders of eligible academic staff in their portfolios.