



**ACT**  
Government

# STUDIES ASSISTANCE GUIDELINES

Education Directorate  
2020

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# INTRODUCTION

The Education Directorate is committed to being a leading learning organisation, where our people know they matter. Studies assistance supports employees to undertake approved professional development through formal study in their relevant field.

Directorate employees are required to apply for studies assistance prior to every study period. Employees may also be approved as a student, for study leave and financial support.

Courses of study should be identified through an individual's Personal Development Plan or Professional Pathways Agreement. Proposed study should align with the Branch/Directorate strategic priorities.

## ROLES AND RESPONSIBILITIES

### Employee

- > Read the Education Directorates Studies Assistance Guidelines.
- > Ensure they discuss study options with their manager/Principal as a part of their Personal Development Plan or Professional Pathways Agreement.
- > Ensure the study assistance application is submitted to manager/Principal in accordance with these guidelines.
- > Confirm via email, to People and Performance, that the manager/Principal understands that all financial assistance is to be met by the business area.
- > Attend all scheduled classes in the approved study program, unless there are unexpected circumstances.
- > Maintain personal records, which may be subject to audit, including:
  - completed application form
  - confirmation letter from Shared Services (SS)
  - formal academic transcripts
  - record of study costs where financial assistance has been provided, including request for reimbursement
  - Delegate signed attendance records detailing study leave

### Manager or Principal

- > Identify and implement effective resourcing arrangements, noting that financial assistance and costs, such as position backfill, or workload reallocation are to be met from within the business area budget.
- > Ensure all study assistance applications meet the criteria and align with strategic priorities.
- > Maintain records of study approvals.
- > Recommend, or not, approval of study assistance application, including Leave Without Pay (LWOP) application if relevant.
- > Forward all applications for Delegate approval, even if the study is not recommended.
- > Enable employees to attend as many scheduled classes as practicable.
- > Monitor employee's use of study leave.

## Delegate (Executive Branch Manager, People and Performance)

- > Ensure the application meets the requirements of these guidelines.
- > Approve studies assistance applications.

## Shared Services Training and Development Unit

- > Maintain the study assistance application and reimbursement forms and Frequently Asked Questions.

## People and Performance

- > Confirm the employees manager/Principal understands that all financial assistance is met by the business area.
- > Maintain study assistance records for the Directorate.
- > Report on studies assistance usage and expenditure.
- > Facilitate Delegate approval for the employee.

## Director-General

- > Make discretionary decisions within the Directorate regarding study leave and financial assistance under the Public Sector Management Standards 2006 Part 7.4, s560.

## ELIGIBILITY

Permanent staff with more than 12 months service can apply for studies assistance. Excluding staff on probation, cadets, apprentices, those participating in the graduate program, trainees and staff who are approved for other forms of financial assistance, for example scholarships.

## COURSE OF STUDY APPROVAL

To gain approval the proposed study must include one or more of the following:

- > Courses that last for a minimum of one semester, trimester or study period, that leads to a nationally recognised qualification or statement of attainment under the Australian Quality Training Framework (AQTF), or a trade or professional certificate.
- > A program that leads to a recognised qualification, such as; degrees, diplomas and certificates.
- > A tertiary preparation unit return to study program or similar single subject designed to prepare adult learners to undertake a course of study.
- > Summer or Winter schools, residentials or professional placements that contribute to one of the above programs.
- > Short or bespoke courses offered by an approved educational institution or registered training authority, that may not lead to a qualification.
- > Thesis.
- > Formal assessments, including Recognition of Current Competency (RCC) or Recognition of Prior Learning (RPL).

## Modes of study

Modes of study that may be approved include:

- > Distance or external
- > Face-to-face
- > Online

## Providers

Providers of study that may be approved include:

- > University
- > Technical and Further Education (TAFE) technical school or other organisation accredited under the AQTF as a Recognised Training Organisation (RTO)
- > Secondary education

## Types of studies assistance approval

### Approval as a student only

Approval as a student provides employee's with:

- > Leave to attend compulsory examinations.
- > Compensation coverage under the Safety, Rehabilitation and Compensation Act 1988, for travel between their usual place of work and study location.

### Withdrawal of approval

Approval as a student may be revoked in cases of misconduct or underperformance. In such instances, the employee will receive written advice and a reasonable period of notice.

### Approval for study leave

Approval for study leave is at the discretion of the Delegate and entitles the successful employee with up to eight hours or 13 hours for diversity cohorts per week (inclusive of travel). Study leave is to be used in the agreed study period and is not cumulative.

Part-time employees are entitled to pro rata study leave using the following formula:

$$(A/B) \times C = Z$$

<b>A</b>	Number of hours of duty per week
<b>B</b>	Number of standard hours of duty per week of full-time staff in the same classification
<b>C</b>	Number of hours leave accessible to full-time staff
<b>Z</b>	Maximum number of hours available for pro rata study leave

Study leave can be approved for:

- > Course attendance
- > Distance education
- > Block release

- > Examinations
- > Associated travel

Employees who have been approved as a student only may use flex or other approved accumulated leave (e.g. annual or long service leave) or LWOP, provided their manager/Principal approves the leave.

### **Study leave approval needs to specify if it includes**

- > Resourcing by the work area (e.g. manager/Principal approved redistribution of workload within the team, meeting cost of staff backfill from budget).
- > Flex debit up to a specified level during the study period and additional hours to be worked in the study vacation time to return to a neutral balance.
- > Employee restructuring their hours to complete work commitments but not accumulate, or have approved, flex credit in excess of 36:45 hours per fortnight.
- > A mixture (percentage cited) of coverage within the work area budget and flex arrangements.
- > LWOP, the form must be provided with the studies assistance application.

### **Approval for block release**

Approval for block release is intended for use on study activities other than compulsory classes, such as external study, completion of assessable tasks, examination preparation, professional placements and/or residentials. These activities must form an essential component for successful course completion. The total allocation for approved block release is at the discretion of the Delegate but would not normally exceed 50 hours per semester.

Approval needs to specify whether fully or partially resourced by the work area (e.g. 50% workload redesign and 50% LWOP).

### **Full-time study leave without pay (LWOP)**

Where LWOP is granted for full-time students it is at the Delegates discretion whether the leave should count as service or not.

### **Approval for financial assistance**

Approved students can apply for financial assistance to complete study.

Financial assistance may include full or partial payment of costs associated with the study program. This includes payment of partial or full Higher Education Loan Program (HELP) debts (if 100% is approved financial assistance) where staff are unable to pay upfront for their course fees and costs associated with RCC/RPL.

Financial assistance does not cover:

- > learning resources (e.g textbooks)
- > accommodation or travel costs
- > general administration
- > childcare
- > association membership fees
- > fines
- > graduate expenses
- > Fringe Benefit Tax (FBT).

## Approval of financial assistance

- > Financial assistance for study is at the discretion of the applicant's manager/Principal.
- > Financial assistance is met from the work areas budget.
- > Managers/Principals should be equitable when making decisions regarding resourcing for study purposes and determining the category of financial assistance.

## Categories for financial assistance

Category	Description	Financial assistance
<b>One - Critical</b>	Highly relevant to the Directorate in the current work unit	Up to 100% of study expenses
<b>Two - Relevant</b>	Relevant to the ACTPS and the personal development in terms of developing generic capabilities and building succession capacity for the individual and organisation.	Up to 60% of study expenses
<b>Three – No direct relevance</b>	The intended study has no direct relevance to the Directorate or the ACTPS but benefits the individual's future directions (career or personal interest).	0% of study expenses

## Confirmation that business area is responsible for financial assistance

People and Performance will seek confirmation from the employee that the manager/Principal understands all financial assistance will be met by the business area. An employee's study assistance application will not be progressed until this confirmation is received.

## Reimbursement

Reimbursement of agreed costs are paid at the completion of a period of study (e.g. semester, trimester or study period) when the employee provides certified\* copies of:

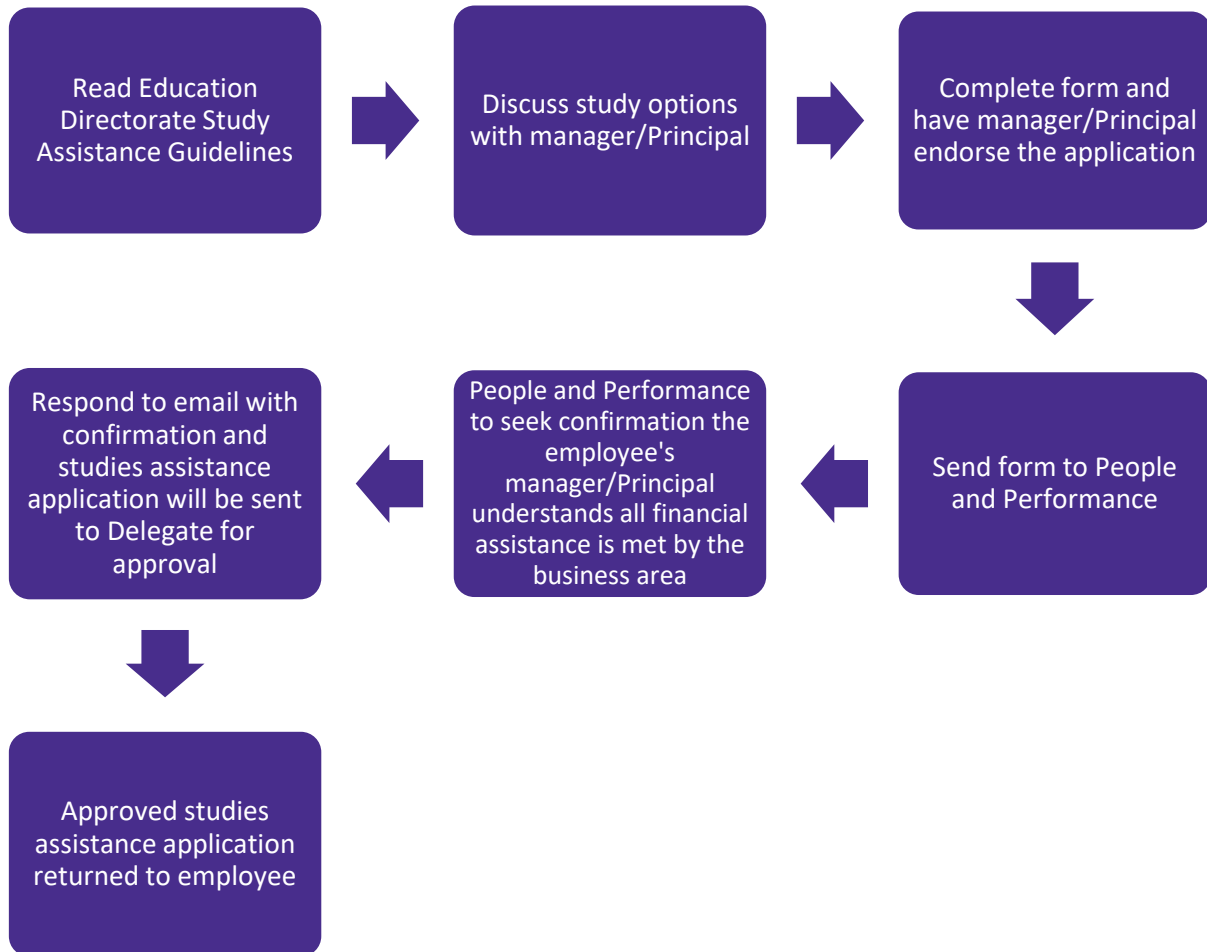
- > Invoice and receipt of payment or HELP
- > Proof of successful completion of the study

\*Guidelines on how to certify a document can be found at <https://www.education.gov.au/guidelines-certification-documents>. If the original document can only be obtained via printing from an official site (e.g. university or bank website), the certifier must witness the printing of the document before certification can occur.

## Fringe Benefit Tax

Reimbursement paid under study assistance can be subject to Fringe Benefit Tax (FBT). FBT implications will vary on a case-by-case basis and advice should be sought from the Australian Taxation Office and/or Finance.

## PROCESS – APPLYING FOR STUDIES ASSISTANCE



# CHECKLIST

Task	Complete
<b>Applying for studies assistance</b>	
<b>Review the guidelines and decide what type of assistance you will be applying for</b>	<input type="checkbox"/>
<b>Discuss studying with your manager/Principal as a part of your performance discussion</b>	<input type="checkbox"/>
<b>Ensure manager/Principal understands any financial reimbursements is met by the business area</b>	<input type="checkbox"/>
<b>Complete forms found at <a href="http://shareservices/actgovt/Training/Studies_Assistance.html">http://shareservices/actgovt/Training/Studies_Assistance.html</a> and have manager/Principal endorse the form</b>	<input type="checkbox"/>
<b>Have financial Delegate sign form (if applicable)</b>	<input type="checkbox"/>
<b>Send form to People and Performance for Delegate sign-off</b>	<input type="checkbox"/>
<b>Retain and maintain records related to studies assistance</b>	<input type="checkbox"/>
<b>Seeking reimbursement</b>	
<b>Complete the studies financial assistance reimbursement form <a href="http://shareservices/actgovt/Training/Studies_Assistance.html">http://shareservices/actgovt/Training/Studies_Assistance.html</a></b>	<input type="checkbox"/>
<b>Attached original or certified true copy of invoice, payment of fees and results.</b>	<input type="checkbox"/>
<b>Send form to shared services for payment. Reminder: the business area is responsible for payment of all financial assistance.</b>	<input type="checkbox"/>



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