



**Australian Government**

**Department of Resources  
Energy and Tourism**

# Studies Assistance

(Version 01 / January 2012)

Issued by: Human Resource Management

References:

RET Enterprise Agreement 2011 - 2014

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## Principles

- ❑ Support is provided for employees to undertake courses of study that will contribute to the improvement of their professional skills and knowledge relevant to their employment with RET.
- ❑ All ongoing employees are eligible to apply for studies assistance. Non-ongoing employees will not normally be granted access to studies assistance.
- ❑ Studies assistance approval is on a strictly discretionary basis and must be negotiated within the work unit before study commitments are undertaken.
- ❑ A centralised approval process has been established. Approval for study assistance is to be recommended by Branch Head, endorsed by the relevant Division Head and approved by General Manager, Human Resources. Final Approval for the study assistance application is to be provided by the General Manager, Human Resources to ensure alignment with the RET Learning and Development Strategy.
- ❑ Approved students are eligible for study leave and financial assistance in the form of a bursary and study materials, and are entitled to paid examination leave.

## Introduction

The Department is committed to providing an environment in which employees are adequately equipped to achieve career and professional development needs relevant to their employment.

Studies assistance provides leave and financial assistance for employees to undertake courses of study that will contribute to the improvement of their professional skills and knowledge relevant to their employment.

**This assistance is on a strictly discretionary basis and must be negotiated within the work unit before study commitments are undertaken.**

## Eligibility

All ongoing employees are eligible to apply for studies assistance.

Non-ongoing employees will not normally be granted access to studies assistance. However, in instances where the student's Manager considers that the course of study being undertaken is clearly relevant to the objectives of the work unit, they may use their discretion to approve studies assistance.

For students on continuing studies, satisfactory results from the previous semester are required before studies assistance can be considered for the following semester.

Permanent, part-time employees are eligible for studies assistance. The amount of study leave which may be granted will be based on a pro-rata formula.

For example, if a permanent part-time employee works half the weekly hours of a full-time employee, they may be approved to access up to half the relevant study leave provision outlined for their mode of study.

## Criteria for Eligibility

Employees intending to undertake a course of study should first discuss their plans with their managers to ensure that they correspond with work unit aims and that their study commitments can be accommodated within operational requirements.

The criteria under which applications should be considered are:

- the strategic and operational needs of the department;
- the impact of absences for study purposes on the workload of the work unit;
- the effective work performance of the applicant;
- the skills and specific knowledge required by the work unit;
- the career and professional development needs of the applicant;
- the relevance of the course of study to the employees employment within RET.

**Note:** Study not wholly related to employment would attract an FBT liability to the Department. Employers are required to record the grossed-up taxable value of fringe benefits on the group certificate of any employee who receives relevant benefits with a total taxable value exceeding \$2,000. (Eg. studies assistances payments of \$1,200 x 1.8692 = \$2,243.04 reportable on their group certificate.) This in turn may affect benefits they are receiving from other Government sources (eg. Centrelink payment).

## Elements of Assistance

There are three elements of studies assistance support for approved students. These elements are:

1. Workers compensation
  2. Study leave
  3. Financial assistance (studies assistance bursary)
- Approved students are entitled to workers' compensation coverage for all paid study leave.
  - Only approved students are eligible for study leave and financial assistance under studies assistance, but the status of 'approved student' does not automatically entitle the applicant to this leave (this is at the Managers discretion).
  - Approved students who do not require, or are not granted, study leave, may still access the studies assistance bursary.
  - Approved students who do not require financial assistance, may still access study leave and/or leave credits.

## Scheme of Study

Studies assistance will usually be accessed by employees enrolled at an institution accredited to deliver a scheme of study designed to achieve an award, as described by the following Australian Qualifications Framework:

### Australian Qualifications Framework

Schools Credential	Vocational Credential	Higher Education Credential
Senior Secondary - Certificate of Education	Advanced Diploma Diploma Certificate IV Certificate III Certificate II Certificate I	Doctoral Degree Masters Degree Graduate Diploma Graduate Certificate Bachelor Degree Advanced Diploma Diploma

## Non-award Courses

Short courses, such as 2 or 3 day workshops, residentials or single units not undertaken as part of a scheme of study are not provided for in this policy. Approval for employees to attend non-award courses is subject to their Manager's approval. Such approval **does not** entitle the employee to studies assistance provisions applicable under this policy .

## Study Leave

Study leave is usually calculated on the basis of a 13 week university semester or an 18 week TAFE semester which only accounts for actual teaching weeks and does not include class free periods. Wherever possible students are encouraged to use nonstandard hours for their class and lecture commitments. However, when these commitments fall within the working day, students can access the following:

### *Part-Time Study*

- 1 unit study load - up to 3 hours study leave per week.
- 2 units or more study load - up to 5 hours study leave per week.
- Reasonable travel time to the institution, up to a maximum of 3 hours per week;  
(unused travel time does not accrue).
- Additional leave to sit examinations.

Managers have the discretion to extend the maximum 5 hours per week study leave, for 2 or more units, to 8 hours per week. In assessing an application for studies assistance, the Manager must consider whether the student has an exceptionally heavy study load or other relevant exceptional circumstances, and balance this with work area priorities.

### ***External/Distance Education***

- Up to 3 hours per week study leave regardless of load. This can be used on a weekly basis or in any other way as agreed between students and their Manager.
- Leave to travel to and attend compulsory residential components at their educational institution (if travel falls on a public holiday or on weekends there is no entitlement to the credit of travel time in-lieu);
- Leave to sit examinations at the closest distance education examination centre.
- All travel arrangements and costs are the responsibility of the student.

### ***Thesis students***

Thesis students, who are not required to attend formal lectures, tutorials, etc, may accrue notional studies assistance leave credits of up to 3 hours per week x 20 weeks = 60 hours, each half calendar year.

This can be used on a weekly basis or in any other way as agreed by students and their Manager. Leave can not be carried over from one half calendar year to the next.

**Note: Trimester students:** Where a student may wish to undertake study on a trimester or “summer-school” basis, it is at the Manager’s discretion then to allow study leave or not.

### **Study Leave Credit**

Where a student does not use all the study leave that is approved (for instance, where a student needs to use only 2 hours per week of standard hours to attend lectures, but is approved for 3 hours) the student can accumulate a credit of study leave of the balance (i.e. in this case 1 hour/week).

Study leave credit can be used to prepare for examinations, write essays or for other valid study activities as agreed with the Manager. It must be used within the semester accrued and can not be carried over to the next semester. To access study leave credits, students should obtain their Managers approval in advance by completing the *Study Leave Credit Form* which can be located in the Application for Studies Assistance (see Attachment A).

**Study leave credits do not continue to accrue where students take recreation or other forms of paid leave.** It is important to note that students do not have workers' compensation coverage while travelling to and attending classes while they are on any leave other than study leave.

### **Examination Leave**

Approved students are entitled to paid examination leave, in addition to study leave. Absences for examination leave must be noted on the *Study Leave Credit Form* prior to the examination date. Exam leave should not exceed the specified examination times as stated on the examination schedule and reasonable travel time to, and from, the examination centre.

## Financial Assistance

The Department offers financial assistance to students in the form of a bursary. This is paid by the end of each semester in the following amounts:

- **University students** - \$485 per semester - up to a maximum of \$970 for the academic year;
- **TAFE/CIT/Other accredited institution** - \$245 per semester - up to a maximum of \$490 for the academic year.

Bursaries will be paid through the pay system on completion of *the Authority for Payment of Bursary Form* which can be located in the Application for Studies Assistance (see Attachment A). Proof of enrolment, paid fees, receipts or tax invoices (official university print-outs or screen dumps are also acceptable) and **must** be attached to the form and forwarded to Human Resources for processing.

**Note:** Receipts/tax invoices are required for student FBT purposes.

For students on continuing studies, satisfactory results from the previous semester are required before the bursary can be paid and **must** be attached to the *Authority for Payment of Bursary Form*.

**The bursary is assessable as income for the purposes of taxation and recipients should include the full amount as income when submitting tax returns. Employees requiring further advice on taxation implications in relation to the bursary payment should contact the Australian Taxation Office or an Accountant.**

The Manager may decide to meet, from divisional funds, some or all costs encountered by the student. This can be in addition to the bursary payment.

**Where the manager approves study that is not related to the applicants employment, the managers division will be liable for the bursary payment and the FBT liability.**

**Note:** Students undertaking trimester courses are only eligible to receive a maximum amount of \$970 for any academic year. This means that if a student has already received \$970 for two semesters prior to enrolling in a summer course, they can no longer access any additional bursary payments for that calendar year.

## Withdrawals/Changes to Timetable

Students who change their timetables, withdraw from a course or unit or defer their studies must notify their Manager and Human Resources as soon as possible.

In cases where the bursary has been paid and a student withdraws from the approved course of study, the bursary should normally be repaid to the Department. A cheque is to be made out to the Collector of Public Monies. The decision to repay the bursary is up to the student's Manager who should consider the circumstances of the withdrawal from study (for example work commitments or illness).

## Role of Managers

Branch Heads are responsible for the recommending of Applications for Studies Assistance, for the calculation of the study leave credit (using the formula on page 10) and ongoing monitoring of the use of those study leave credits by their employees.

When considering an Application for Studies Assistance, Managers should, in the first instance, assess applications against the Criteria for Eligibility (see page 4). They should also be aware that:

- the granting of approval for study leave is **strictly discretionary**;
- the level of approved support (apart from the Studies Assistance bursary) is a matter for negotiation between the student and supervisor;
- they ensure the prospective applicant has read the policy and procedures, understands their requirements and agrees to abide by them;
- they are required to advise the student of their study leave credit;
- they are required to monitor the student's progress and ensure that *the Study Leave Credit Form* is correctly maintained and kept up to date at all times.

## Delegations for Approval

Final approval for study leave and financial assistance rests jointly with the Head of Division and the General Manager, Human Resources, and is subject to recommendations by the Branch Heads.

## How to Apply for Studies Assistance

Applications for studies assistance must be made on the *Application for Studies Assistance* form.

**New forms must be completed and lodged with the student's Branch Head prior to the commencement of each semester.**

The *Application for Studies Assistance* and the Studies Assistance policy and procedures are available on the Departmental Intranet.

- The *Application for Studies Assistance* is to be completed and forwarded to the Branch Head for recommendation. Applications are to be accompanied by proof of paid enrolment, and for continuing students, copies of previous results.
- Once recommended, the Branch Head is to calculate the students study leave and leave credit and compile the *Study Leave Credit Form*. The Branch Head should then advise the student that their application for studies assistance and study leave credit has been passed to the Head of Division/General Manager, Human Resources for final approval.



- Documentation that is to be included in the Application for Studies Assistance is: Once, the following documents must be forwarded to the Human Resource Management section who will organise processing of the bursary payment and maintain statistical data:
  - *Original copy of Application for Studies Assistance including Authority for Payment of Bursary form and Study Leave Credit form*
  - proof of paid enrolment; and
  - previous semester results if applicable.

**Please note:** It is Departmental policy that all payments in excess of \$50.00 be made through payroll system. Payment will be made directly into the students nominated bank account. There is no provision for the cash payment of the bursary.

It is important that applications are lodged with the student's Branch Head well before the commencement of studies. Study leave cannot be approved retrospectively and until such time as the application is approved, students must use flex time or recreation leave to attend lectures, classes or tutorials. **Such leave is not covered by workers' compensation provisions. For these reasons students and their Branch Heads should ensure that applications are completed in a timely manner and attached to an appropriate file.**

Students who apply for studies assistance after the term/semester begins are to be given pro rata study leave. For instance, if a person applies in week 7 of a 13 week semester, calculations for study leave will be based on the remaining 6 weeks in the semester.

Students who transfer from other agencies must provide copies of their previous agency's approval for studies assistance. In such cases, regardless of whether the transfer is for a few weeks or is permanent, students must seek approval from their Branch Heads to ensure continuation under RET's studies assistance. **Previous approval for study leave in another agency does not automatically entitle a student to study leave under studies assistance in RET.**

## Calculating Study Leave Credit

### *Use of Study Leave Credit*

Study leave credit may be used for any approved study activities from the beginning of an approved study period. The credit may be used on a regular basis or accumulate as a block of paid leave up to the available study leave credit limit. The record showing the use of credit **must be completed by the student and the student's Manager in advance of the leave being taken.**

It is important that the *Study Leave Credit Form* be maintained accurately as it serves as a record for worker's compensation purposes. The department takes no responsibility should mismanagement lead to lack of compensation coverage.

### *Calculating Study Leave Credit*

The amount of study leave credit, which may be granted, is based on the following formula:

$$(L - G) \times N = C$$

**L** = the maximum hours per week which may be granted by the Manager to the approved student ie. three, five or eight hours per week.

**G** = the number of hours approved for class attendance per week.

**N** = the number of tuition weeks in the study period (excluding class free periods), or, in the case of late application, from the date of approval.

**C** = the study leave credit available.

**Example 1:** A part-time student undertaking 1 unit who attends classes for 2 hours per week and has been approved for 3 hours per week, can accrue study leave credit equal to 1 hour per week over 13 weeks of the semester as follows:

$$(L - G) \times N = C$$

**(3 - 2) x 13 = 13 hours study leave credit.** (This is the Total Accrual for the semester - see example Study Leave Credit Form following)

**Example 2:** A part-time student undertaking 2 units who attends classes for 2 hours per week and has been approved for five hours per week can accrue study leave credit equal to 3 hours per week over the 13 tuition weeks of the semester as follows:

$$(L - G) \times N = C$$

**(5 - 2) x 13 = 39 hours study leave credit.** (This is the Total Accrual for the semester - see example Study Leave Credit Form following)

**Example 3:** A part-time student undertaking one unit has been approved for 2.5 hours per week and has an allowance of 3 hours per week and has been approved from week seven of a 13 week semester. Therefore, the student can accrue study leave credit equal to .5 hours per week as follows:

$$(L - G) \times N = C$$

**(3 - 2.5) x 6 = 3 hours study leave credit.** (This is the Total Accrual for the semester - see example Study Leave Credit Form at Attachment B)

**Example 4:** A student undertaking 1 unit has an allowance of 3 hours per week, however, requires 4 hours to attend classes. The student will need to access flex or recreation leave to make up the additional hour every week.

**Example 5:** Distance education and thesis students can access three hours per week or allow this to accrue during the semester. Accrued leave must be used before the end of the semester.



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**Energy and Tourism**

**APPLICATION FOR STUDIES ASSISTANCE**

*The information provided on this form will be used in the processing and approval of study leave arrangements and will not be disclosed outside the Department.*

**APPLICANT'S NAME:** \_\_\_\_\_

Year and term/semester for which assistance is sought: \_\_\_\_\_

What are you applying for?

Approval as a student .....

Approval for study leave.....

Financial Assistance (Studies Assistance Bursary)....

**Applicant's Check List:**

Have you attached:

- Proof of enrolment
- Proof of payment (tax invoice or receipt)
- Previous semester results (if you are a continuing student)

**Joint Approval**  
**Endorsed By:**

**Approved By:**

.....  
Division Head  
Date: .... / .... / .....

.....  
General Manager, HR  
Date: .... / .... / .....

## GENERAL INFORMATION

Surname	First Name	Preferred Name
Work Location	Telephone	Classification
Division	Branch	Section

### Employment Status

Permanent

On contract for > 12 months

Full-time

Part time  → P/T hours per week: \_\_\_\_\_

## STUDY PROPOSAL

Full title of current proposed course: \_\_\_\_\_

Name of institution: \_\_\_\_\_

List the subjects to be completed this term/semester:


Please state how the proposed course of study will meet the department's strategic and operational needs:

Year of commencement of study: \_\_\_\_\_

Year of study (e.g. 1<sup>st</sup> year undergraduate, 2<sup>nd</sup> year postgraduate): \_\_\_\_\_

Anticipated year of completion: \_\_\_\_\_

### Method of Study

Full time

External

Part time

Thesis

**Full time study leave without pay:** *Students considering applying for LWOP to study are advised to contact HR regarding the effects that taking leave will have on their superannuation and leave entitlements.*

# REQUEST FOR LEAVE

(Tick the appropriate box)

**Part Time**

How many units are you undertaking this semester? \_\_\_\_\_

Term/Semester dates: from: \_\_\_\_\_ to: \_\_\_\_\_

Note: Semester does not include class free and exam periods

Class free Period: from: \_\_\_\_\_ to: \_\_\_\_\_

Semester/Term	Day	Subject	Type*	Travel	Session Time	Travel

\* L = Lecture, T = Tutorial, P = Practical

- NOTE:**
1. Include all study and travel
  2. Paid leave is granted for travel and study during *standard hours* (8.30am – 12.30pm, 1.30pm – 4.51pm)

## External/Correspondence

Home Study (Maximum 3 hours per week)

Day	Time

Dates of compulsory residential segments:

	Travel	Residentials	Subject
From			
To			
From			
To			

I acknowledge that I have read and understood the Studies Assistance Policy and Procedures. I certify that this course of study is 100% business related.

-----  
Applicant's signature

.../.../.....  
Date

**Manager/Section Head**

Describe how the proposed course of study meets the career or personal development needs of the officer as detailed by their agreed Individual Development Plan, including any special needs the officer may have as a member of an EO group. Also describe how the course of study proposed relates to the applicants employment.

Indicate whether the proposed timetable for Studies Assistance can be accommodated within the Section's current operational requirements.


Name: ..... Designation: .....

Signature: ..... Date: ..../...../.....

**General Manager/Branch Head**

Do you approve the applicant's request to undertake this course of study?

Yes  No

Are any or all of the costs associated with this course being paid from Branch funds?

Yes  No

If you do not approve the applicant's request, please give reason/s:


Name: ..... Designation: .....

Signature: ..... Date: ..../...../.....

## MANAGER'S ACTION

Previous results provided      **Yes**       **No**       **N/A**

Proof of enrolment provided      **Yes**       **No**

Study leave credits calculated      **Yes**       **No**

Student advised      **Yes**       **No**

**Date Authority for Payment of Bursary and copy of Application for Studies Assistance forwarded to HR .../...../.....**



## ATTACHMENT A: STUDY LEAVE CREDIT FORM

Name	
Manager	
Semester	
*Length of Semester (Actual teaching weeks)	
**Number of Units	
Actual class attendance	
***Weekly accrual of Credit	
Total accrual for semester	

Date	Time From	Time To	Total	Balance	Student Signature	Managers Signature

\* Study leave credit does not accrue while an officer is on paid leave of absence. If an officer takes recreation, personal or long service leave during the semester, the combined number of weeks taken should be deducted from the formula used in this calculation.

\*\* Number of units:                    1 unit = 3 hours per week  
     2 or more units = 5 hours per week  
     External and Thesis = 3 hours per week  
     regardless of units

\*\*\* Weekly accrual of credit excludes study time used to attend scheduled lectures etc, as detailed by the student in their application. Consequently these activities do not need to be recorded on this pro forma.

**ATTACHMENT B:  
AUTHORITY FOR PAYMENT OF BURSARY**

**To: Human Resources**

**Semester** \_\_\_\_\_

Name: \_\_\_\_\_

AGS Number: \_\_\_\_\_

Classification: \_\_\_\_\_

Section (in full): \_\_\_\_\_

Branch (in full): \_\_\_\_\_

Division: \_\_\_\_\_ Telephone: \_\_\_\_\_

Course (include name of institution): \_\_\_\_\_

Date Studies Commenced: \_\_\_\_\_ Expected Year of Completion: \_\_\_\_\_

This application for Bursary is for a Continuing Student

**Managers Acknowledgement:**

I acknowledge that I have approved the above name to receive Studies Assistance in accordance with the Department's Studies Assistance Policy and that the payment of a Bursary as detailed in those guidelines to the amount of \$485 can be made.

.....  
General Managers Name (Please print clearly)

.....  
Signature

.....  
Date

**Note: Your Bursary payment will be paid through the payroll system.  
Please forward to Human Resources, Level 5, 51 Allara Street.**

