



**ACT**  
Government

Environment, Planning and  
Sustainable Development

# STUDY ASSISTANCE POLICY AND GUIDELINES

ENVIRONMENT, PLANNING AND  
SUSTAINABLE DEVELOPMENT  
DIRECTORATE

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# PURPOSE

This Study Assistance Policy outlines to all employees of the Environment, Planning and Sustainable Development Directorate (EPSDD) the eligibility criteria, and decision-making parameters for determining Study Assistance Applications.

## INTRODUCTION

Study Assistance is one of a range of options available to employees to assist with their professional development needs. It is designed to complement the key training priorities of the Directorate, and the individual branches and teams within. It encourages employees to develop their capabilities and become more skilled and knowledgeable in areas that will be of mutual benefit to both them and the workplace.

Study Assistance fosters a valuable investment in EPSDD's employees and aims to achieve the following:

- Increase competencies of employees to meet the EPSDD's strategic goals; and
- Improve current and future job performance.

Approval for Study Assistance is discretionary and is **not an employee entitlement**. Applications for Study Assistance are assessed each semester/study period on a case-by-case basis and require the recommendation of the appropriate Manager with the final approval made at the discretion of an appropriately delegated officer.

## DEFINITIONS

**Manager** means a person who has direct supervisory responsibility for one or more employees such as a Team Leader/Supervisor/Manager/Assistant Director/Director.

**Delegate** means a person who has appropriate financial delegation in accordance with the Public Sector Management (Financial Management Act 1996 – Expenditure) Delegation. For the purposes of Study Assistance Applications, the delegate is the applicant's Executive Branch Manager (EBM) or Executive Group Manager (EGM).

## ROLES AND RESPONSIBILITIES

### EMPLOYEE

- > Follow the application process and complete the checklist found at Attachment 1;
- > Discuss study options with immediate Manager and document this in the Performance and Development Plan;
- > Ensure the Study Assistance Application is submitted to Supervisor/Manager/Delegate in accordance with these guidelines;
- > Understand 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; and
- > Maintain personal records, which may be subject to audit, including:
  - Completed/signed application form;
  - Confirmation letter from EPSDD's People and Capability;
  - Formal academic transcripts;
  - Record of study costs where financial assistance has been provided, including request for reimbursement; and

- Delegate signed attendance records detailing study leave.

## SUPERVISOR / MANAGER

- > 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 outlined in this policy 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; and
- > Monitor employee's use of study leave.

## DELEGATE (EXECUTIVE BRANCH/ GROUP MANAGER)

- > Ensure the application meets the requirements of this policy; and
- > Approve or reject/amend Study Assistance Applications.

## EPSDD FINANCE

- > Check Study Assistance reimbursement requests contain all necessary documentation and forward to Shared Services Finance for payment.

## SHARED SERVICES FINANCE

- > Process financial reimbursement of approved study costs, subject to successful completion of the course of study and submission of correct documentation in hard copy.

## EPSDD PEOPLE AND CAPABILITY

- > Confirm that both the approving Manager and Delegate understand that all financial assistance is met by the business area;
- > Maintain Study Assistance records for the Directorate; and
- > Report on Study Assistance usage and expenditure.

## EPSDD 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 within the ACTPS can apply for Study Assistance. Excluding staff on probation, cadets, apprentices, contractors, those participating in the graduate program, trainees and staff who are approved for other forms of financial assistance, for example scholarships.

**Part-time employees** are eligible for Study Assistance with allowances determined on a pro-rata basis.

**Temporary employees with a fixed term contract of 12 months or more** can apply for Study Assistance.

**Temporary employees with a contract of less than 12 months** are ineligible for approval of Study Assistance unless the Delegate determines that the course of study is imperative for the strategic and operational needs of the work area and the Directorate.

Temporary employees who wish to undertake study may utilise flex or other approved leave provided they have the agreement of their Manager. However, financial assistance is not available to temporary employees who have a contract for 12 months or less.

When employees move to another Directorate within the ACTPS, they must discuss their study arrangements with the new Directorate prior to commencement. The new Directorate has no obligation to continue any arrangements made with EPSDD, nor to approve Study Assistance at all. An application will need to be made to the new Directorate for consideration and approval.

## APPROVED COURSES OF STUDY

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; and
- > Formal assessments, including Recognition of Current Competency (RCC) or Recognition of Prior Learning (RPL).

## PROVIDERS

Providers of study that may be approved include:

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

## TYPES OF STUDY ASSISTANCE APPROVAL

### Approval as a student only

Approval as a student provides employees with:

- > Leave to attend compulsory examinations; and
- > 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 by the Delegate in serious cases of misconduct or underperformance. In such instances, the employee must receive written advice and a reasonable period of notice.

## Approval for Study Leave

Approval for paid or unpaid study leave to attend classes scheduled during standard working hours may be granted at the discretion of the Delegate. Unless there are exceptional circumstances, the maximum allowable allocation of paid study leave for a full time staff member should not exceed;

- 6 hours / week to attend classes; and
- 2 hours Travel Time.

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

### How to use $(A/B) \times C = Z$ formula:

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

## 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)

Full time students are encouraged to consult with Payroll regarding the effect of Leave Without Pay on their entitlements. Employees may be unattached from their position when undertaking full time study without pay for one academic year or more. The delegate may initiate this action and both the employee and delegate may enter into an Unattachment Agreement.

The Delegate should plan for the placement of unattached officers by monitoring vacancies and the date the employee is expected to return to duty. However, excess officer provisions may apply to employees returning from Leave Without Pay for full time study, where an employee cannot be permanently placed.

## Approval for financial assistance

Approval as a student entitles employees to apply for full or part financial reimbursement, upon successful completion of their course. It is intended to support employees completing study that are directly related to their work. The decision of whether to provide Financial Assistance will be based on the submission of the applicant and consideration of the current job, likely career path and desirability of the study. The amount of support may vary, with priority given to those planning study which is highly relevant to the applicant's current role and the needs of the Directorate.

Financial Assistance is only applicable for compulsory course fees and enrolment fees. It does not include:

- books, journals and newspapers;
- late fees or disciplinary fines;
- fees for subjects not successfully completed (except in extenuating circumstances);
- study costs once an employee leaves EPSDD to work in another Directorate;
- travel and accommodation expenses incurred while attending residential components;
- local travel expenses;
- postage and telephone calls;
- childcare expenses;
- library joining fees;
- graduation fees; and
- parking fees and fines.

Please note that the reimbursement of study expenditure may incur Fringe Benefits Tax (FBT). Generally, FBT is payable by the Directorate when the reimbursement relates to a Commonwealth subsidised course.

As a guide, CIT courses and CPA modules are not subsidised by the Commonwealth and therefore would not attract FBT. Only university courses can be subsidised by the Commonwealth. Reimbursements of employee's HECS-HELP charges are subject to FBT. The university invoice will include such words as "HECS-HELP", "COMSUPPORT" or "COM-xx", where xx is the financial year.

When approving Study Assistance for an employee who is attending university, the Manager must consider the potential Fringe Benefits Tax (FBT) implications. University courses that are subsidised by the Government (i.e. can be accrued as HECS) attract FBT. Here is an example of the FBT payable by EPSDD for a university HECS related course:

FBT payable by EPSDD example	
HECS/Course Fee Reimbursement	\$5000
Reimbursement is 'Grossed up' by 1.8868	\$9434
FBT amount payable at 47%	\$4434

Essentially the study is costing the line area \$5000 for the reimbursement of fees and an additional \$4434 for FBT.

Note that the 'Grossed up' percentage and the FBT percentage may change depending on the ATO annual update.

If you are unsure whether the reimbursement will attract FBT or how to calculate it, contact the EPSDD's Finance section.

## GUIDELINES FOR RECOMMENDING AND APPROVING STUDY ASSISTANCE

The applicant's immediate Manager will consider the application in line with the eligibility criteria set out in this policy and make a recommendation to the Delegate (Executive Branch/ Group Manager).

The Delegate will consider the application, the Manager's recommendation, and these guidelines before making a decision.

In assessing a course of study for approval, both the Manager and Delegate will consider:

- The strategic and operational needs and priorities of the Directorate and the resources available;
- The capabilities required to enable the Directorate to meet its current and future goals;
- The applicant's work performance and learning and career development needs as detailed in their Personal Development Plan;

- The applicant’s study history, and what assistance has previously been provided. Applications from employees who have had a long history of support in more than one area of study should be closely scrutinised to identify the benefits of study;
- Any relevant workplace equity and diversity issues; and
- Any other benefits accruing from the course.

In addition to the factors detailed above when assessing a claim for study leave, the Manager and Delegate will consider:

- The day to day operational requirements of the work area;
- The number of hours face-to-face tuition in the course;
- The time required to travel to the place of study; and
- The study load for the employee (e.g. the number of units being studied).

## Approving Study Leave

Unless there are exceptional circumstances, the maximum allowable allocation of paid study leave for a full time staff member should not exceed;

- 6 Hours to attend classes / per week; and
- 2 Hours Travel Time.

## Approving financial assistance

Financial assistance for study is;

- at the discretion of the applicant’s Executive Branch/Group Manager; and
- met from the work areas budget.

Delegates have a responsibility to ensure decisions regarding resourcing for study purposes and determining the category of financial assistance are made equitably.

### Recommended maximum levels of financial assistance

Category	Description	Recommended Maximum Financial Assistance
<b>One - Critical</b>	Highly relevant/mandatory/legislated training that is required for applicant’s current position.	Up to 100% of study expenses
<b>Two - Relevant</b>	Study which is of direct relevance to the applicant’s current work area and responsibility.	Up to 75% of study expenses
<b>Three – No direct relevance</b>	Study which is relevant to the skills and knowledge needs of the ACTPS and directly contributes to the applicant’s career development and/or capacity for mobility within the ACTPS.	Up to 50% of study expenses

# 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; and
- > Proof of successful completion of the study.

Reimbursement requests must use the Study Assistance Reimbursement form available on the EPSDD Intranet and should be sent to EPSDD Finance for processing.

### Fringe benefit tax

Note that 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.

### Reimbursement for a failed component of a course of study

If there are extenuating circumstances, a student who is studying more than one unit and fails to complete all the units during a study period, may be eligible for reimbursement of the costs for units that have been successfully completed.

## REVIEW OF DECISION

Where a Delegate (decision maker) makes a decision not to approve an application for Study Assistance, an employee may seek a review of the decision in accordance with 'Section I – Internal Review Procedures' of the relevant Enterprise Agreement. However, an employee should first discuss their concerns with the relevant Delegate in an attempt to resolve the matter locally before proceeding with an internal review. Please contact People and Capability at [EPSDD.HR@act.gov.au](mailto:EPSDD.HR@act.gov.au) for further guidance.

# ATTACHMENT 1 – EMPLOYEE CHECKLIST FOR STUDY ASSISTANCE APPLICATIONS

## APPLYING FOR STUDY ASSISTANCE

Task	Complete
Discuss studying with your Supervisor/Manager as a part of your performance discussion – these discussions should begin as early as possible before the study commences to allow time for an application to be reviewed.	<input type="checkbox"/>
Read and understand the Study Assistance Policy to determine the level of study assistance you are eligible for e.g. approval as a student, study leave, and financial assistance available.	<input type="checkbox"/>
Ensure Supervisor/Manager understands any financial reimbursements is met by the business area.	<input type="checkbox"/>
Complete the Study Assistance Application Form found at <a href="#">EPSDD Study Assistance Intranet Page</a> and have your immediate Supervisor/Manager endorse the form.	<input type="checkbox"/>
Have your financial Delegate (Executive Branch/Group Manager) approve and sign the application form.	<input type="checkbox"/>
Send form via email to EPSDD People and Capability at <a href="mailto:EPSDDTraining@act.gov.au">EPSDDTraining@act.gov.au</a> for record purposes.	<input type="checkbox"/>
Retain and maintain records related to Study Assistance.	<input type="checkbox"/>

## SEEKING REIMBURSEMENT (IF APPROVED FOR FINANCIAL ASSISTANCE)

Task	Complete
Complete the Study Assistance Reimbursement Form <a href="#">EPSDD Study Assistance Intranet Page</a>	<input type="checkbox"/>
Attach original or certified true copy of invoice, payment of fees and results.	<input type="checkbox"/>
<p>Send form to your Finance team to process.</p> <p>Please contact EPSDD Finance if you have any questions related to the reimbursement form. EPSDD Finance will then forward your reimbursement form and all other documents to Shared Services Finance for payment.</p> <p>Shared Services Finance will process your reimbursement in around 30 days.</p> <p>Reminder: the business area is responsible for payment of all financial assistance out of their own cost centre.</p>	<input type="checkbox"/>