

Staff Tertiary Study Assistance Policy and Procedures

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Mana Whakaae Approval Authority	Executive Director of People, Culture and Campus
Āpiha Whakapā Contact Officer	Learning and Development Advisor – People, Culture and Campus

Kupu Whakataki | Introduction

This policy provides information on the support available to staff members wishing to pursue tertiary study under the University's Staff Tertiary Study Assistance programme (STSA).

The policy supplements the [Professional Development and Review \(PD&R\) Policy \(PDF, 216KB\)](#) and internal Human Resources processes and procedures as outlined in the [HR Toolkit \(University People and Culture intranet\) \(Staff only\)](#).

Kaupapa Here | Policy

This policy must be read in conjunction with the related People and Culture processes, procedures and guidelines contained in the [HR Toolkit \(University People and Culture intranet\) \(Staff only\)](#), e.g. Professional Development and Review (PD&R).

Study Assistance provisions apply to University **staff members only** and therefore do not apply to contractors and consultants employed on Contract for Services Agreements, subcontractors and their employees, adjunct appointees, Erskine visitors, interns and volunteers.

The University supports and encourages the personal and professional development of its staff members by offering study assistance provisions.

Study assistance provisions also comprise part of the benefits available to University staff members. The value of both work-related and non-work-related study is recognised, with a higher level of support given to study that is relevant to, or contributes, to the individual staff member's role.

Staff who have had their application for study assistance approved will have their tuition fees fully or partially paid (for UC study) or reimbursed upon successful completion if undertaken through an external tertiary provider.

Additionally, study assistance provides for periods of study leave to attend lectures or undertake research related to an approved tertiary course.

The principles of this policy with respect to eligibility and payment of fees are also applicable to staff undertaking Doctoral or Master's study but arrangements will need to be negotiated on a case-by-case basis. Guidelines for these arrangements are linked to this policy under the [Related Documents and Information](#) section of this policy.

1. Eligibility and Exemptions

1.1 Eligibility to Apply

The applicant's manager is responsible for establishing the eligibility of a staff member to apply for Tertiary Study Assistance; determining operational requirements and, in the case of study external to the University, availability of funding to reimburse course fees from the departmental budget.

To meet the eligibility requirements, at the time of their application the staff member must

- a. Be a current member of staff at the University on an employment agreement.
- b. Served a term of employment with the University for a minimum of 12 months.
- c. Work full-time hours (1.0 FTE) or part-time hours of at least 0.5 FTE.
- d. Meet New Zealand Government criteria for domestic fees rates, i.e. have permanent residency status or citizenship.

Further information about Domestic and International admission can be found at [Check Eligibility for Admission \(University Enrol website\)](#). Staff who do not meet the domestic fee criteria will be considered for Staff Tertiary Study Assistance on a case by case basis, the final decision resting with the Executive Director, Human Resources;

OR

Hold a current Talent or Work Visa (staff members on Talent and Work Visas will need to apply to New Zealand Immigration for a variation on their work visa, unless the study is authorised by the University to be part of their employment).

- e. Be commencing the course of study on a future date. No retrospective application for STSA will be accepted.
- f. Have achieved a pass result for previous course/s funded by the University, or have withdrawn from a funded course within the date for refund of fees.
- g. Demonstrate current and on-going satisfactory performance and conduct in their role.

For study other than Master's and Doctoral:

Be employed on a continuing agreement, or a fixed-term agreement greater than 18 months, including Postdoctoral Fellows. Study assistance will not be granted past the termination date for a staff member on a fixed-term employment agreement.

OR

For Master's and Doctoral study, be employed on a continuing agreement.

The staff member must meet all the above criteria to be eligible to apply for STSA.

However, in the event that

- Key development opportunities are identified for a staff member prior to completion of the minimum term of employment of 12 months; or
- Study assistance provisions are used as part of a recruitment and attraction process; or
- Study is deemed a requirement by the employer.

Then, provided all other criteria requirements are met, the staff member may proceed with an application for STSA.

Meeting the eligibility criteria however **does not** guarantee the approval of a staff member's application for STSA.

1.2 Exemptions

In special cases, the relevant Senior Leadership Team (SLT) member may approve an exemption for a member of staff who does not meet the above eligibility criteria. An appeal for exemption, outlining the grounds on which it is being sought, must be made in writing to the relevant SL member. If approved, an application for study assistance may then proceed as per the standard process.

2. Restrictions

2.1 Workload

As a guide, approval of Staff Tertiary Study Assistance is generally restricted to one course per semester and one course over the Summer School period. However, there may be instances where a course is spread over the whole year. In this case, at the manager's discretion, approval may be granted for a staff member to apply for a semester and a full year course. The manager must give consideration to the appropriateness of the study workload and their ability to maintain their operations and services.

2.2 Relevance of Study

The manager is responsible for making the decision regarding what constitutes work-related study and may require additional supporting material demonstrating the linkages from the staff member in order to make this decision.

If study is deemed work-related, the staff member will be eligible to apply for assistance of up to 100 percent of the tuition fee, at the manager's discretion. If study is deemed non work-related, the staff member may be entitled to apply for assistance of up to 50 percent of the tuition fee, at the manager's discretion.

2.3 Tuition Fees

The manager is responsible for approving courses of study within the University (paid from a centrally administered fund). For approved courses of study with other tertiary education providers, including providers within the Canterbury Tertiary Alliance (CTA), managers may approve fee reimbursements subject to the availability of funds within their departmental budgets.

The provision of study assistance is limited to **tuition fees only**. STSA does not include additional, non-tuition course costs such as

- text books,
- additional Master's or PhD fees,
- administration fees,
- other course-related costs.

The staff member is responsible for meeting the payment of any non-tuition course costs and will not be eligible to claim reimbursement for these from their department.

Staff granted full tuition assistance are automatically exempt from the Student Services Levy. This will be waived in the enrolment process.

2.4 High Investment Study Contract

'High investment study' is described as study which incurs high investment on the part of the University in terms of financial assistance and/or paid time off for study or research or attendance at lectures.

A high investment study contract may be negotiated in some circumstances (for example, external study) requiring the staff member to enter into a length of service bond (for no more than two years) with the University. In these instances, a discussion between the staff member, line manager and People and Culture Senior/Business Partner should take place to determine if a contract should be negotiated and entered into between the University and the staff member.

3. Terms & Conditions

The provision of Staff Tertiary Study Assistance is regulated by the Terms & Conditions outlined below. These apply to those who receive, or are eligible to receive, payment of fees as part of the policy.

3.1 Changes to Employment or Circumstances

A staff member must meet all of the eligibility criteria at any given point during an approved course of study.

The staff member's manager may reconsider any current study arrangements if necessary. Where possible, Managers/Heads will endeavour to preserve the study arrangements for the current enrolment period.

3.2 Leave to Attend Classes and Examinations

Managers have the discretion to approve study assistance and grant paid or unpaid leave for staff members to attend lectures or undertake research or other study. The amount of work-related study leave to attend classes will vary depending on the course being undertaken and the terms and conditions of the staff member's employment agreement.

When approving leave to attend classes, managers must consider

- the requirements of the course,
- how these requirements fit with the staff member's position,
- the study agreements of other staff in the operational unit,
- the operational needs of the department/school/unit, and
- the professional/study leave provisions detailed in the staff member's employment agreement.

Managers may consider it necessary for a staff member to make up their study hours or attend classes outside their normal working hours and grant approval for study on this basis. Such arrangements should be detailed in the 'proposed study' section of the Application for Staff Tertiary Study Assistance form. Staff members are eligible for half-day paid examination leave to attend each examination. Additional hours of paid leave may be approved at the manager's discretion.

All paid study or examination leave must fall within the staff member's normal working hours and the normal leave application process will apply. Please note that approval of leave to attend examinations does not apply to tests or other assessments as these normally occur within the weekly lecture or class times. Where tests fall outside of normal lecture or class times, staff members should discuss this and make appropriate arrangements with their manager.

3.3 Course Failures

Only in exceptional circumstances will the University approve further study for a staff member who has previously received study assistance for a course of study they have failed. This includes those staff who have received assistance and who have withdrawn from the course past the date for refund of fees.

In the event that a staff member re-sits and passes the failed course at his/her own expense, they will be deemed to meet eligibility criteria clause [1.1 f\)](#) to re-apply for further study assistance.

If a staff member withdraws from a course within the date for refund of fees, this will not affect their eligibility to apply for further study assistance. Where fees are refunded, they will be returned to the party that paid them in the first instance.

Only in exceptional circumstances will study leave be approved for a second or subsequent attempt at any course of study.

3.4 Performance

Provision of study assistance, both financial and non-financial, is subject to continuing assessment of the staff member's professional performance and conduct in the role for which they are employed, as outlined in eligibility clause [1.1 g\)](#).

3.5 Leaving the University

From the date of a staff member's resignation, retirement, redundancy or conclusion of their fixed-term employment with the University, study assistance will cease. If study is confirmed for a future semester, for which the course has not yet begun, or if it is within its period of withdrawal, the University may discontinue its approval of funding. For those who successfully complete approved external study prior to the conclusion of their employment, whether on a fixed-term or continuing employment agreement, a reimbursement may still be processed, provided this occurs within a reasonable time frame following the release of result information, normally within the financial year for which the study was budgeted.

If a staff member resigns or retires from their employment with the University *during* an approved external course of study, they will not be eligible to receive a reimbursement for study assistance. Only in exceptional circumstances will this be granted, subject to recommendation from a staff member's manager, and approval from the relevant SLT member.

Procedures

Please refer to the [HR Toolkit \(University People and Culture intranet\)](#) regarding this process, related procedures and in particular in regards to

- determining need for study at PD&R,
- applying for Staff Tertiary Study Assistance,
- funding of the study (which budget the fees will be paid from),
- staff paying up-front (for external study), and
- providing evidence of results.

Tautuhinga | Definitions

Canterbury Tertiary Alliance (CTA) – includes the University of Canterbury, Lincoln University and Ara Institute of Canterbury.

Course of Study – may refer to a single paper leading to a Certificate of Proficiency or a qualification.

Full-time equivalent (FTE) – a unit of measurement which is equal to one, full time, annual-salaried position.

Manager or immediate manager – means those persons employed by the University who have responsibility for the development of other staff, including the Vice-Chancellor, Senior Leadership Team members, Directors, Heads of School/Department/Centre, Managers, Team Leaders, and Supervisors.

Non-work-related study – study that is not immediately applicable to a staff member's current role or likely future career within the University.

Staff or staff member – person/s engaged for paid employment with the University by way of an employment agreement.

Tuition Fees – the Tuition Fee listed for the course; this does not include other fees such as text books, additional MBA fees, administration fees etc.

Work-related Study – study that is relevant to or contributes to a staff member's current role or possible future role/s, by enhancing their ability to perform their role and/or advancing the development of their department or the University as a whole.

He kōrero anō | Related Documents and Information

Te Pātaka Kaupapa Here | UC Policy Library

- [Professional Development and Review \(PD&R\) Policy \(PDF, 216KB\)](#)
- [Student Services Levy Policy \(PDF, 2273KB\)](#)

Te Pae Tukutuku me te Ipurangiroti o UC | University Website and Intranet

- [Apply for Staff Tertiary Study Assistance External to UC \(People and Culture intranet\) \(Staff Only\)](#)
- [Apply for Staff Tertiary Study Assistance Within UC \(People and Culture intranet\) \(Staff Only\)](#)
- [Check Eligibility for Admission \(University Enrol website\)](#)
- [Guideline: Staff Master's and Doctoral Study \(PDF\) \(People and Culture intranet \(Staff Only\)\)](#)
- [HR Toolkit \(University People and Culture intranet\) \(Staff only\)](#)

- [Enrol at UC \(University Enrol website\)](#)
- [Exemptions for UC Staff \(University Get Started website\)](#)

If you have any further questions around this policy, please contact your [People and Culture Business Partner \(University About UC website\)](#).

Document History and Version Control Table			
Version	Action	Approval Authority	Action Date
<i>For document history and versioning prior to 2013 contact ucpolicy@canterbury.ac.nz</i>			
1.00	Major review of document and conversion into new template.	Director, Human Resources	Sep 2013
1.01	Updated hyperlinks	Policy Unit	Nov 2013
1.02	Amendment made to Restriction 2.2 Tuition Fees	Director, Human Resources	Dec 2013
1.03	Hyperlinks updated.	Policy Unit	Sep 2014
1.04	Unscheduled review, minor changes by Contact Officer.	Policy Unit	Dec 2014
1.05	Unscheduled review, minor changes by Contact Officer.	Policy Unit	Jan 2015
2.00	Scheduled review by Contact Officer.	Policy Unit	Aug 2015
2.01	Unscheduled review by Contact Officer, policy application clarified, formatting, changes to definitions	Executive Director, Human Resources	Oct 2017
3.00	Scheduled review by CO, major changes to content	Executive Director, Human Resources	Sep 2018
4.00	Scheduled review by Contact Officer, minor changes	Policy Unit	Oct 2021
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