

UNSW@ADFA Special Studies Program (SSP)

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SSP Financial Assistance

Rates for SSP financial Assistance from 2008				
Airfare	Grant towards Living Expenses - Rate (calculated in weekly increments)	Spouse	Child	Estimated Total (Based on 6 months SSP Academic + Partner + 1 child)
Overseas placement				
\$2860 (max) (up to \$2860 economy travel)	\$1000 per month (calculated pro rata in weekly increments of \$250/wk)	\$1500 * (Airfare only)	\$1500 * (Airfare only per child)	\$11,860
Australia (Outside ACT ^)				
\$1000 (max) (up to \$1000 economy travel)	\$400 per month (outside NSW; calculated pro rata in weekly increments of \$100/wk)	\$1000 * (up to \$1000 economy travel)	\$700 * (up to \$700 economy travel per child)	\$5,100

* Spouse and child financial assistance will only be paid if SSP overseas/national is for 8 weeks or more in length.

^ Applications within the ACT can be referred to the Rector for approval of financial assistance through SSP.

Criteria and Application Procedure Period of SSP

A Special Studies Program (SSP) is a period of release from normal duties to engage in research or other scholarly work or to undertake a project related to teaching or to academic administration.

The participation of a member of the academic staff in an SSP is not an entitlement but is based on the needs of the University, the nature of the proposed project and the capacity of the staff member to make effective use of the opportunity.

Period of SSP

An SSP is normally of six months, but applications for periods of up to twelve months will be considered where an appropriate case is made.

An application to undertake an SSP of greater than six months requires the presentation of a case with supporting argument to demonstrate the need for the longer period.

Additional Leave

Any period of Long Service Leave or Leave Without Pay to be taken in conjunction with the approved SSP requires specific prior approval from the Head of School and the Rector. Applications for such additional absences should be forwarded to your HR Consultant.

Recreation Leave, which is sought in Session time in conjunction with SSP, must also have the written authorisation of the staff member's Head of School and the Rector.

Location of SSP

Each member of staff seeking to engage in an SSP is required to demonstrate the appropriateness of the place or places where it is proposed that the program be pursued. Merely studying for a further qualification, or working at home, does not constitute an acceptable basis for an SSP. An SSP may not be taken at UNSW, nor may it, except in special circumstances and with strong justification, consist merely of a series of brief visits to a number of institutions or sites.

If a staff member wishes to remain at UNSW it may be appropriate to request a period of Internal Release. (See Internal Release section below.)

Eligibility

A member of the academic staff is eligible to apply for permission to undertake an SSP provided that it shall commence no sooner than three years after entry on duty. Where prior service at the level of lecturer and above at another university in Australia, New Zealand or Papua New Guinea has been recognised for the purpose of determining SSP eligibility, that period may count towards the minimum period required. Application for recognition of prior service for SSP purposes should be made to the Human Resources Section at the time of appointment at UNSW@ADFA. SSP eligibility accrues at the rate of one month for each full session of academic service up to a maximum of twelve months after six years' service. SSP eligibility does not accrue during absence on SSP or Leave Without Pay.

For second and subsequent SSPs there is no minimum eligibility requirement except that implied by the eligibility accrual rate.

Method of Debiting Eligibility

Where an SSP covers all the teaching weeks in a session the SSP eligibility will be reduced by six months; where an SSP covers only some of the teaching weeks, the eligibility will be reduced on a pro rata basis.

The following formula is applied for applicants who are engaged in a 13 week teaching session: -

$n/13 \times 6/1 =$ No of months debit to SSP eligibility

Where n equals the number of weeks of SSP being taken in session (usually 13 weeks).

This rule explains why, in some cases, the debit to SSP eligibility is greater than the actual period of SSP. If a member of staff wishes to change the program so that the absence and the leave debited are equal, the extra time would need to be taken during the recess. Any further intrusion into the teaching weeks of the session would accrue a further debit.

Care should be taken when staff members apply for SSP in excess of six months. For example ten or eleven month's SSP eligibility is insufficient to cover an SSP absence for the whole of session 1 and session 2 in a calendar year. In such cases an accrued SSP eligibility of 12 months is required.

Applicants Who Are Within 2 Years of Retirement

Permission to undertake an SSP is not normally given to a member of staff who is within two years of the date of intended retirement.

SSP Approval Authority

The Rector is the approving authority for all SSP applications submitted at UNSW@ADFA.

What does the Rector look for?

The Rector operates within the context of the University's recognition of the value of Special Studies Programs for the pursuit of research, scholarly work and the development of teaching and learning skills.

An SSP is assessed on the needs of the University, the nature of the proposed project and the capacity of the staff member to make effective use of the opportunity. Each academic staff member seeking to engage in an SSP is required to demonstrate to the Rector the benefit to that member and to the University of the proposed program and the appropriateness of the place or places where it is to be pursued.

The most important aspect which the Rector looks at in assessing programs is evidence of research and/or other scholarly activities or professional development, the relevance of the proposed program to these activities which may be demonstrated by publications, by the ability to attract grants from outside sources for research or by involvement with outside professional bodies.

Secondly, the proposed program must be detailed sufficiently to enable an academic assessment of it to be made, including the choice of place or places where it is intended to pursue the SSP.

Writing up research results is not in itself a sufficient justification for an SSP, nor are brief visits to a number of places. It is also usually considered preferable that a higher degree is completed before undertaking an SSP, unless the program can be justified and approved as part of the degree by the relevant School committee, and unless it conforms to the established SSP guidelines contained in this document.

Finally, the Rector looks at the benefits to be gained by the individual as a result of the proposed SSP. Will it help the applicant's research, scholarship development and/or teaching program on return?

Conditions of Approval

Approval to undertake an SSP will be granted only where the teaching program can be carried on without serious disruption and without additional cost (although if the member of staff is in a very small academic unit the Rector may waive the latter proviso). In each case satisfactory arrangements must be made for the continuity of supervision of higher degree students.

An SSP approval carries with it the condition that the member of staff undertakes to resume full normal duties in the University on completion of the period allowed for the SSP and to continue in those duties for a time not less than the period of absence; in default, repayment is to be made to the University of salary and allowances received during the period, or a proportion of them.

A staff member who has completed a period of SSP must submit a report on the SSP no later than three months after the completion of the period. The Head of School concerned will be invited to comment on the report and especially on the extent to which the aims of the approved program have been achieved.

Application Procedure

Application for approval to undertake an SSP is made on form HR14. This application is submitted through the Head of School to the HR Consultant, who will forward to the Rector for approval.

An application will not be considered if the report from a previous program has not been submitted.

It is the responsibility of the applicant to make sure that the Rector is aware of all relevant facts. For example, if the rate of publication after a previous SSP is low because of a move into a new field of teaching and/or research or because of very heavy teaching or administrative loads, applicants must draw these factors to the Rector's attention if they wish them to be taken into account.

The Rector considers three basic areas:

- (a) present research and other scholarly and/or teaching activities;
- b) proposed Special Studies Program;
- c) longer term benefit from SSP.

The Rector can only recommend a program which, in their view, would result in a significant benefit to the staff member's research or other scholarly or teaching activities beyond that which would occur in the course of her/his normal University activities. This may be difficult for an applicant to demonstrate if there is no evidence of research and/or other scholarly or teaching activity during the previous three years, especially if the applicant has undertaken a recent SSP, or if the expectations from the previous SSP were not substantially realised.

If a staff member is unable to provide evidence of research or teaching accomplishments, it is necessary to attach a statement setting out mitigating circumstances, together with any other information which will demonstrate to the Rector that the staff member would make good use of the experience if an SSP is approved.

These comments are not intended to discourage staff members from applying for SSP. Where an applicant has any doubts or uncertainty about these matters they should consult their Head of School or the Rector.

Once the Rector approves the application it is returned to the HR Consultant who will write to the applicant and Head of School advising of the outcome (whether approved or not).

NOTE - Report from previous SSP Program **must** be attached to the HR14 form.

Outside Remuneration Whilst on SSP

While full salary is normally paid if the approved program is adhered to, the University reserves the right to pay less than the full salary to a member of staff who, while undertaking an SSP, will receive substantial outside remuneration, particularly where the net amount of such remuneration (after allowance for any expenses connected with the SSP) might be expected to exceed 25% of the normal salary. On return from the SSP the member of staff may, on submission of a detailed statement of actual earnings and expenditure apply for an adjustment of salary previously withheld.

Period of SSP Acceptance of Teaching Position Whilst on SSP

In order to offset the costs of undertaking an overseas SSP or to work with a particular expert in the subject area or at a leading institution, an applicant may wish to accept a teaching position during the SSP. This is normally acceptable provided that the teaching responsibilities account for no more than 30% of the period of SSP, unless the approved program relates directly to teaching methods, when the 30% limit would not apply.

Financial Assistance for Staff on SSP

Airfares

Payment of the staff member's airfare to a maximum of A\$2,860. Fares are not shown on a Payment Summary.

Staff must use one of the approved UNSW Travel Agents: Kistend Campus Travel and Anywhere Travel. Please consult the Official Travel Policy and Procedures.

Invoices or Statement of Costs and copies of the itineraries must be given to the administrative person authorised to issue on-line travel purchase orders in the member of staff's school who will create the on-line purchase order and dispatch it to one of the approved agents.

Purchase orders must be paid for initially by school funds which will be reimbursed by the central SSP fund by way of internal transfer. A Financial Services Department L30 form (Request for Internal Debit) should be prepared by the administrative staff in the School and sent to the HR Consultant showing all chartfields to be credited and accompanied by all documentation (invoices and itineraries) for the relevant airfare booked.

Please note: Staff research accounts cannot be re-credited by the SSP fund.

Support for Family

For family members accompanying for eight weeks or more a fixed contribution towards airfares is payable upon receipt of an itinerary and evidence of payment, or an invoice if the payment is to be made directly to a University approved Travel Agent. The contribution can be paid by an on-line purchase order, as is used for the staff member, if a copy of the itinerary showing travel in excess of eight weeks is provided. Alternatively staff can pay the approved Travel Agent and claim reimbursement by providing an original receipt to the HR Consultant. Staff are responsible for any outstanding amounts payable to the Travel Agent.

Rates for family are:

For overseas travel the contribution for spouse or child is up to \$1500 each. For travel outside the ACT but within Australia, contribution for spouse is up to \$1000 and up to \$700 per child (economy).

Grant Money Towards Living Expenses

Staff members staying outside Australia may be paid A\$250 per week towards living expenses. For SSP taken within Australia (outside the ACT) the allowance is \$100 per week.

If you wish to seek a standard grant please complete and return to the HR Consultant the form [HR16](#). It is suggested that this be done about **6 WEEKS** prior to your departure.

Grants paid are shown on the Payment Summary for the tax year in which they are paid. They are not taxed at source but are assessable for tax purposes and shown under the heading "Allowances" on your Payment Summary. They should be substantiated by evidence of costs incurred during SSP when tax returns are lodged (excluding expenses of family members).

1. All grants will be restricted to a maximum of two every six years. Staff members will be able to take shorter, more frequent SSPs when appropriate, but only the first two in each six year period will be supported by a grant.
2. Grants will be rescinded when net earnings exceed expenditure on a dollar for dollar basis.
3. Staff members will be required to sign a statutory declaration in relation to grants for themselves and for their family.

Assistance for Academic Staff with Disabilities

UNSW has established the Travel Assistance Fund as part of its commitment to academic staff members with disabilities. When they are travelling on approved voluntary activities such as conferences or SSP, the Fund will contribute to additional travel costs incurred because of the disabilities. Further information on the Travel Assistance Fund can be found:

<http://www.hr.unsw.edu.au/employee/acad/ragssp.html>

All applications will be treated confidentially. Application forms can be obtained from the Equity and Diversity Unit on 9385 4734. Please forward completed applications to the Director, Equity and Diversity.

Exceptional Circumstances

There is provision for applicants who seek consideration of exceptional financial hardship to be referred to the Rector via the HR Consultant.

Staff members seeking additional funding should provide details of their exceptional circumstances to the HR Consultant. The Rector considers applications for exceptional circumstances as they arise.

Salary Whilst on SSP

A member of staff may elect to be paid fortnightly during their SSP at half the normal rate with the remaining portion payable in advance. The half-salary advance may be released within six weeks of departure. Staff members who wish to receive a half-salary advance free of tax are required to provide the University with an *Application for Variation of Amounts Required to be Withheld under PAYG Income Tax Withholding Form 2036* approved by the Australian Tax Office.

If the Tax Office grants a tax exemption, the half-salary advance will be shown separately on the staff member's Payment Summary under the heading "Allowances". Amounts shown under this heading will be deemed to be assessable for taxation at the end of the relevant tax year. If tax exemption is not granted, the half-salary advance will be included in the salary aggregate for the relevant tax year.

It is left to academic staff to claim expenses incurred during their SSP as deductions against the half-salary and SSP grant. This requires the academic staff member to comply with the substantiation provisions for travel expenses in the Income Tax Assessment Act.

The basic rule is that all travel expenses incurred overseas have to be substantiated. This involves obtaining receipts or similar documents from the supplier of goods or services that shows the nature and date of the expense. While the ATO claims there has been no policy change, it is the case that the ATO will no longer accept per diem claims for deductions without substantiation.

The rule of substantiation applies to all travel expenses incurred overseas. Retention of receipts or similar documents is therefore essential for the purpose of claiming these expenses as a deduction for income tax purposes.

It is important to note that this information is not intended to replace advice from your taxation advisers. You should seek your own taxation advice if you have any further queries on this matter.

PAYG Income Tax Withholding/Variation Application

Although UNSW does not provide tax advice, if you wish to receive a half-salary advance free of tax for part or all of your SSP period:

- Contact any Australian Taxation Office to request an application form (Application for Variation of Amounts Required to be Withheld under PAYG Income Tax Withholding Form 2036).
- Complete and return the form to the Australian Taxation Office (see below).

- The Australian Taxation Office assesses the application and advises the applicant and the Salaries Unit of outcome.
- HR Consultant and Salaries Unit process the half-salary advance accordingly.

Please be aware that the application procedure may take up to two months. It is therefore recommended that staff members who wish to apply for an exemption should do so as early as possible.

If you have further queries in regards to the above matters, please contact the Australian Taxation Office:

Australian Taxation Office Income Tax Withholding Variation Section
PO BOX 9990
UPPER MT GRAVATT QLD 4122

Phone no: 1300 360 221

Variation to Approved Dates of SSP

The Head of School must approve any variation to the dates (minor variation) for which an SSP has been approved. Significant alterations to the approved program (major variation) should be forwarded through the Head of School to the Rector for approval. Examples of major and minor variations follow:

Major Variations:

- Change of Session or Term for dates of SSP
- Substitution of a different project for approved project
- Substitution of location to another country
- Additional location in another country
- Attendance at extra conferences – over two weeks in total
- Substitution of different type of location i.e. industrial rather than tertiary institution

The member of staff should submit an application for variation to Head of School who will pass it on with an appropriate recommendation to the Rector for approval. The Rector should forward correspondence to the HR Consultant who will advise the staff member of the outcome.

Minor Variations:

- Change of commencement and conclusion dates without changing Session in which absence falls.
- Inclusion of visits to additional institutions and countries
- Attendance at further conferences under two weeks in total
- Cancellation of portion of program
- Change of location to similar type location within same country i.e. University of Oxford to University of Cambridge, MIT instead of Harvard University

The member of staff should submit a request for variation to their Head of School for approval. The Head of School should forward correspondence to the HR Consultant who will advise the staff member of the outcome.

When advising the member of staff, the HR Consultant will, in appropriate cases, advise of any adjustment to the staff member's SSP eligibility caused by the variation.

If a half-salary travel advance has been drawn for overseas travel and the period of overseas travel is subsequently shortened or cancelled, the staff member will need to adjust personal income tax payments.

Internal Release

As Special Studies Program (SSP) policy does not permit the staff member to be based on the home campus, Internal Release may be used as a substitute for a Special Studies Program (SSP).

Internal Release is a term used to describe the release of a member of the academic staff from all teaching and administrative commitments for a period of at least six weeks for the purpose of undertaking a period of research based at the staff member's home campus e.g UNSW@ADFA. Additionally, Internal Release may be utilised by staff that use their home for work. It is a condition of Internal Release that the staff member will forfeit an equivalent period of SSP eligibility in the same manner as if the period of Internal Release is an SSP. It follows that there is no eligibility for Internal Release if the staff member does not hold equivalent SSP eligibility.

An application for Internal Release should be arranged with the approval of the Head of School and the Rector. The form of application - letter, proforma etc. - is for local determination. Notification of the approval should be forwarded to the HR Consultant who will advise the staff member of the debit to SSP eligibility.

After the conclusion of Internal Release it is not necessary for the staff member to submit a report to the Rector. Schools may, however, require a report to be made internally.

SSP grants for travel and living expenses are not available to staff who undertake a period of Internal Release.

Insurance

The University will automatically cover staff members for both Special Study Program and incidental leisure travel who are out of the country for periods of less than 7 months under the Travel insurance policy. Any travel period over 7 months must be notified to the Risk Management Unit on 9385 1980.

A summary of the Travel Insurance policy and Claims Procedure along with our insurer's emergency contact can be viewed at

<http://www.fin.unsw.edu.au/riskman/rmusplash.html>

Information Required for Inclusion in SSP Report

Staff members are reminded of the reporting requirement attached to an SSP approval. The recommended report format follows:

1. Part A

(Confidential information made available to the HR Consultant may be forwarded directly). This section should show: -

- i. Dates of departure and return of self and dependants.
- ii. Itinerary, including reasons for any variation to the approved itinerary.
- iii. Details of SSP expenses when income (other than SSP Grant) has been received. University SSP Grant money will be reduced, when net income (including SSP Grant) exceeds expenditure, on a dollar for dollar basis.

2. Part B

One copy to be forwarded through the Head of School (or appropriate office as indicated under "Head of School's Comments" at para.3 below.) This section should show: -

- i. Objectives of the Special Studies Program.
- ii. Details of SSP activities stating –
 - a. Facilities available and used
 - b. Research studies undertaken
 - c. Lectures, seminars, conference attended
 - d. Lectures given
- iii. Achievement of the objectives
- iv. Benefit gained from SSP
- v. Other relevant matters

3. Head of School's Comments

One copy forwarded with Part B.

This section should comment on the extent to which the aims of the program have been achieved. (No special form is required for this). In the case of a Head of School, the Rector should make comments.

4. Summary for Publication

You will need to complete a Summary Report. These summaries may be used to select material from SSP reports for inclusion in the University's annual report and other publications. Please include dates of your SSP. Click for [Special Studies Program Summary Report pro-forma \(RTF\)](#).

Where to Send the SSP Report

The completed SSP Report (including Part A and B - SSP details and Head of School's comments) should be forwarded to the Rector.

The completed Summary Report should be emailed to your HR Consultant.

NOTE: Copies of the above four items should be retained by Schools.