Academic Enrichment Program Procedure

Section 1 - Purpose and Scope

Purpose

(1) This Procedure outlines the availability of, and process for applying to participate in, the Academic Enrichment Program (AEP).

(2) The purpose of the AEP is to provide academic employees with time to:

a. focus on a planned program of work in one or a combination of the academic performance domains: teaching, research, citizenship/service, and supervision/researcher development; and
b. achieve concrete outcomes that would be difficult to accomplish otherwise.

(3) The work undertaken during an AEP must have scholarly benefit and enhance the contribution by the employee to the University.

Scope

(4) Fixed term and continuing academic employees (Teaching Focused, Teaching & Research, Research Focused, and Clinical academic employees) who meet the eligibility criteria may indicate their interest in participating in the AEP.

(5) The AEP does not apply to casual academic employees, Teaching Associates, adjunct and honorary appointees, or professional employees.

Section 2 - Key Principles

General principles

(6) The AEP involves a competitive application process. Approval of an application is at the discretion of the University, and participation in AEP activities is not an entitlement, even if the eligibility criteria and assessment criteria are met.

(7) There is no expectation that travel must be undertaken during an AEP.

(8) The AEP period must be taken in a single semester with no impact on availability for academic workload allocation in previous or subsequent semesters.

(9) An AEP can be for a maximum period of six months inclusive of any annual, personal or long service leave taken. Staff must comply with the annual leave requirements set out in clauses 38 and 39.

(10) The AEP cannot be used to undertake study for fulfilment of a university degree.

(11) Each Faculty/Institute will form an AEP Committee (see Part C) who will assess applications each year.

(12) AEP activities are considered work, and staff will be expected to:

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a. deliver the planned program of work in the agreed academic performance domains and
b. continue to meet the standards of conduct set out in the University's policies and procedures.

(13) An AEP proposal that includes interstate or overseas work that is approved is considered flexible work under the Flexible Work Policy.

Travel principles

(14) UQ's Travel Policy and Dual Purpose Travel (DPT) Procedure does not apply to travel undertaken as part of an AEP. Travel must be arranged by the employee in-line with flexible work practices.

(15) Staff will ordinarily continue to have the benefit of the University's workers' compensation coverage arrangements while undertaking work as part of an approved AEP.

(16) Where AEP activities are proposed overseas:

a. the Country Risk Matrix sets out the duration under which UQ is prepared to support an AEP in certain countries.
b. if the AEP application includes travel to a country not supported, or for a duration longer than indicated, in the Country Risk Matrix, an assessment will need to be conducted to enable the University to determine whether it is willing and able to support the proposed AEP. The cost of conducting or obtaining that assessment will be the responsibility of the Faculty/Institute. If the Faculty/Institute agree to seek that assessment, the employee should contact HR Advisory.

(17) Travel related to an AEP must be taken within the dates approved in the employee's AEP application. Any variation to those dates or locations will require separate approval, from the relevant Executive Dean/Institute Director (dates) or Level 2 (if needed) decision-maker (location), before the employee undertakes the travel.

(18) Travel undertaken in accordance with an approved AEP application, and for the purposes of conducting work pursuant to that approved AEP, will be covered by UQ's travel insurance.

(19) Employees on AEP will be provided with international medical and security assistance via the University's emergency assistance provider, International SOS (ISOS). This excludes any period of leave before, during or after their AEP travel, when an employee must rely on their own travel insurance and the assistance provider under that insurance policy.

(20) Where an AEP application includes a proposal to work from interstate or overseas, the employee must also make an application under the Flexible Work Policy. Due to tax implications, insurance, work, health and safety, and other considerations (e.g., location requirements), preliminary location approval from a Level 3 (interstate) or Level 2 (overseas) decision-maker is required under the Flexible Work Policy.

Financial support principles

(21) Employees may be provided with an amount of AEP financial support. This funding will be allocated to the employee's Academic Consultancy Account (ACA).

(22) The employee may access additional funds within their ACA or research accounts for valid UQ business purposes.

(23) All financial support from ACA funds will be provided on a reimbursement claim basis. Claims must be submitted through the University's expense management system and approved by Finance and Business Services prior to payment.

(24) AEP financial support can only be used for valid temporary relocation expenses such as flights to and from an AEP location, temporary accommodation costs in an AEP location and visa costs for an AEP location.

(25) AEP financial support cannot be used to support expenses (for example, flights) for family members.

(26) UQ will not be responsible for funding any costs during any period of leave taken by the employee.

(27) AEP financial support used to pay for employee flights may only be used where the employee undertakes the most direct and cost-effective route from the home location to the approved AEP location, in accordance with an approved AEP plan (avoiding stopovers where possible). For clarity:

a. it is reasonable for an employee to stay overnight in a location if they have an unavoidable stopover in that location, in circumstances where they take the first available connecting flight and the most logical and economical route to the approved AEP location; and
b. private days must not be spent in the stopover location.

(28) Deviations from the direct route may result in Fringe Benefits Tax (FBT) implications and affect travel insurance coverage.

(29) Staff or supervisors seeking more information should contact the UQ Taxation Unit.

Section 3 - Key Requirements

Part A - Eligibility

(30) Employees are eligible to apply for AEP if they:

a. hold an academic appointment as outlined in the Scope (see clause 4 and 5);
b. have satisfactorily completed their most recent APD review;
c. either:
    i. would have completed three years of continuous service in a continuing academic role at the commencement of their nominated AEP period (including probation and excluding periods of leave without pay), unless otherwise agreed in their contract of employment; or
    ii. for research-focused appointments, hold an Academic Level A, B or C appointment and have completed three years of continuous service on a fixed-term academic appointment of at least four years, and have been offered a further appointment (either fixed-term or continuing) which has a period remaining equal to double the length of the AEP upon their return from the AEP. Academic Level D and E staff on research-focused appointments are assumed to have the ability to self-fund dedicated periods of research activity from their research funding; or
    iii. have completed three years' continuous service in a continuing academic role following an AEP (if applicable); and
d. have completed all components of mandatory training modules and employee disclosures.

(31) An employee will not be eligible to apply if they:

a. are currently under performance management (i.e., the Diminished Performance process and/or the Unsatisfactory Performance process has commenced in accordance with the Enterprise Agreement and relevant policy);
b. are on probation;
c. have breached conduct or ethics policies in the last six years;
d. are under formal investigation for misconduct and/or the matters investigated are progressing through the formal stages of the University's misconduct clause as outlined in the Enterprise Agreement; or

e. have previously participated in an AEP (or similar) and:
    i. have not submitted an acceptable report by the required time upon their return;

(32) The Vice-Chancellor, Deputy Vice-Chancellors, President of the Academic Board and Deputy President of the Academic Board, Pro-Vice-Chancellors, Executive Deans and Deputy Executive Deans, Institute Directors, Associate Deans and Deputy Associate Deans, Heads of School and Deputy Heads of School are not eligible for AEP during the term of their appointments to those offices.

Part B - Application process

Step 1 - Discussion

(33) The employee should discuss their interest in applying for an AEP with their supervisor and make a record of this conversation in their Annual Performance and Development (APD) plan.

Step 2 - Preparing an AEP application

What AEP applications should include

(34) An AEP application should include:

a. a completed AEP application form;
b. a copy of the employee's most recent APD and Individual Academic Profile (IAP);
c. supporting evidence demonstrating how the application meets the Assessment Criteria including any set by the Faculty or Institute;
d. if it is intended to access ACA funds in addition to the AEP financial support to pay for elements of the AEP, a budget setting out the proposed costs;
e. information addressing the employee's achievements, having regard to relative to opportunity considerations;
f. a summary of the employee's achievements from any previous periods of AEP (or similar), with an explanation of how those achievements were of value to UQ, and
g. the employee's proposed annual leave plan for the AEP period, which must comply with the annual leave requirements (see clause 38 and 39).

Assessment criteria

(35) AEP applications will be assessed against the following criteria:

a. the employee and their application meet the eligibility criteria in Part A;
b. the planned program of work outlined in the AEP application:
    i. significantly contributes to scholarly activities in one or more of the academic performance domains (teaching, research, citizenship/service, supervision/researcher development);
    ii. is of value to UQ and aligns with Faculty/Institute and University's strategic objectives;
    iii. meaningfully and substantially enhances scholarly development, knowledge, skills and/or experience;
    iv. would not otherwise be achievable during the employee's normal University activities (i.e., normal teaching, research or administrative duties);
    v. justifies the period requested and any travel proposed;
c. the employee has the capacity to make effective use of the opportunity, having either a proven and sustained record of productivity in research or scholarship, or having considerable potential for such achievement, relative to opportunity;
d. the proposal is practically feasible, including that:

i. there is a feasible plan for the employee's teaching and other duties (e.g., HDR supervision, committee and other service roles) to be covered where required;
ii. the timing of the proposed AEP causes minimal disruption to the Faculty/Institute;
iii. the location and duration of the proposed AEP is consistent with clause 16 of the AEP Travel Principles;
iv. the work can be undertaken safely in the proposed location(s);
v. the implementation of the proposal will not cause an unreasonable administrative burden on the University to manage, including having regard to the need to understand and comply with overseas laws; and

e. the employee has indicated their commitment to continue in the recognised service of UQ once the AEP is complete for at least a period equivalent to double the proposed AEP;
f. if the employee has previously participated in an AEP (or similar), that their current application for AEP evidences how that opportunity successfully met the projected outcomes and was of benefit to the University;

(36) Applicants that have not previously participated in an AEP (or similar) will be given priority.

(37) Assessment of achievement will be considered on a relative to opportunity basis.

Annual leave requirements

(38) Employees must take a minimum of 10 days of annual leave for a six-month AEP, or a period calculated on a pro-rata basis if the AEP is less than 6 months or the employee is employed part-time.

(39) Employees with an annual leave balance of 30 or more days (calculated pro-rata for part-time employees) must take an additional 10 days of annual leave (pro-rata to the approved AEP duration) either prior to commencing the AEP and/or during their AEP period and before returning to their normal duties.

Step 3 - Submitting an AEP application

(40) Employees must submit their application to their supervisor by the published deadline. Incomplete applications will not be considered.

(41) Late applications will not be accepted unless, having received evidence of the existence of exceptional circumstances, the supervisor and, where relevant, the Head of the organisational unit (for the purposes of this Procedure, the Head of Unit) recommend that the application be considered.

Step 4 - Assessing an AEP application

(42) Assessment of AEP applications will occur in three stages:

a. Stage 1: in principle approval of the proposed program by the Executive Dean/Institute Director;
b. Stage 2: if the location of the proposed program is overseas or interstate, a preliminary location assessment will need to be conducted, and approval given by a Level 2 (overseas) or Level 3 (interstate) decision-maker respectively under the Flexible Work Policy; and
c. Stage 3: final approval by the Executive Dean/Institute Director.

Stage 1 - In principle approval of the proposed program

(43) Having regard to the eligibility (Part A) and assessment criteria (clause 35):

a. The supervisor will consider all AEP applications and make recommendations to the Head of Unit.
b. The Head of Unit will consider all applications received from supervisors and make recommendations to the AEP Committee.

c. UQ Human Resources will conduct eligibility checks on all applications provided to the AEP Committee and share the outcome of those checks to the AEP Committee. Applications that do not meet eligibility requirements will be removed from the process.
d. The AEP Committee will assist the Executive Dean/Institute Director to review applications that have been recommended by the Heads of Units.
e. The Executive Dean/Institute Director decides whether or to not provide their in-principle approval to the AEP applications.
f. If the AEP application does not include work from a location overseas or interstate the application moves to Stage 3 final determination.

Stage 2 - Location and duration assessment and flexible work request

(44) If the AEP application includes any work from a location overseas or interstate, a preliminary location assessment is conducted by HR Client Partnering and Global Mobility, and separate approval given by the relevant Level 2 (overseas) or Level 3 (interstate) decision-maker under the Flexible Work Policy.

(45) If the AEP application proposes travel to a location, or for a duration, other than those supported in the Country Risk Matrix:

a. The Faculty/Institute will need to seek specific advice from Global Mobility (for international proposals), HR Client Partnering (for interstate proposals), and Insurance Services (for all proposals) about the risks and costs associated with the proposed AEP. If UQ does not possess the relevant knowledge or capabilities internally, external advice might be required. The costs of obtaining external advice will be the responsibility of the Faculty/Institute.
b. If the AEP is approved, any additional costs will need to be met by the Faculty/Institute or the employee.

(46) If an AEP application involves a proposal to work overseas or interstate, the employee will need to apply for workplace flexibility under the Flexible Work Policy as a work from home arrangement.

a. The application for workplace flexibility:
    i. is made after the Executive Dean/Institute Director has assessed and given their in-principle approval of the proposed AEP project; and
    ii. will be streamlined in that it will be taken as given that an AEP proposal that receives in principle approval by the Executive Dean/Institute Director satisfies the Flexibility Principles in the Flexible Work Policy; but
    iii. requires the relevant decision-maker under the Flexible Work Policy (Level 2 for overseas applications or Level 3 for interstate applications) to consider the factors in that policy, as well as the work, health and safety requirements, the impact on insurance, workers' compensation, tax and other regulatory compliance matters.
b. To assess the AEP application under the Flexible Work Policy, the relevant decision-maker will be provided with a copy of the:
    i. AEP application;
    ii. Executive Dean/Institute Director's in principle approval of the AEP Project;
    iii. the Country Risk Matrix; and
    iv. if the AEP application proposes travel to a location, or for a duration, other than those included in the Country Risk Matrix, a report from Global Mobility and Insurance Services outlining the additional risks and costs posed by the AEP proposal.
c. Having regard to that material, the relevant decision-maker will decide whether to give preliminary location approval for the AEP proposal.

Stage 3 - Final approval by the Executive Dean/Institute Director

(47) If the AEP application:

a. does not include work from a location overseas or interstate, or
b. does include work from a location overseas or interstate and preliminary location approval is provided by the relevant decision-maker, then

the Executive Dean/Institute Director may approve an AEP application for up to six months.

(48) Where the AEP application includes work from a location overseas or interstate and the Executive Dean/Institute Director approves an AEP application, this will also amount to approval of the Flexible Work Request.

Step 5 - Notification of application outcome

(49) The Executive Dean/Institute Director will notify employees, their supervisor and the relevant Head of Unit of the decision in writing (outcome letter).

a. Where an application is approved, employees are required to adhere to their approved work plan as outlined in their outcome letter.
b. Where an application is unsuccessful, employees should be given feedback.

Step 6 - Changes to an AEP after approval

(50) To request a change to their AEP, an employee must submit a timely request through their supervisor and Head of Unit.

(51) The Executive Dean/Institute Director will consider requests for major changes to an AEP that have been endorsed by the Head of Unit in consultation with the supervisor. Major changes may include (but are not limited to):

a. changes in location or duration;
b. introduction of new initiatives (with new outcomes); or
c. omission of previous proposed elements.

(52) Where the major change request relates to the location or duration of travel, the Executive Dean/Institute Director will:

a. seek advice from Global Mobility and Insurance Services about the effect of the proposed changes and consider the impact of those changes before deciding whether to approve the request; and
b. if endorsed, refer the request to the appropriate decision-maker under the Flexible Work Policy for preliminary approval.

(53) The Head of Unit in consultation with the supervisor:

a. may approve minor changes to an AEP. Written approval must be obtained before the change can be actioned;
b. should submit a timely endorsement of major changes to the Executive Dean/Institute Director for consideration; or
c. may decide not to approve/endorse the proposed changes.

(54) Approved changes to AEP dates are to be provided to HR, at the earliest known time so that accurate records and payroll can be maintained.

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(55) AEP deferrals of more than six months will not be accommodated.

Part C - AEP Committee

Constitution and purpose

(56) The Executive Dean/Institute Director of each Faculty/Institute will establish and chair an AEP Committee for that Faculty/Institute.

(57) The AEP Committee will have a minimum of three members (including the Chair) and may include members external to the Faculty/Institute if appropriate. The Chair must appoint members with a consideration to the diversity of the Committee.

(58) Each AEP Committee will assess AEP applications from that Faculty/Institute and from any Institute that is situated within the Faculty/Institute.

(59) The AEP Committee will consider each application against the assessment criteria, including criteria that may be Faculty or Institute specific, and rank applications.

Decision-making authority

(60) The Executive Dean/Institute Director should take advice from the AEP Committee in deciding AEP outcomes but is the final decision maker for their respective AEP applications.

Conflict of interest

(61) Conflicts of interest must be declared to the Chair at the commencement of the AEP evaluation process. The Chair is responsible for ensuring that no declared conflict of interest can influence, or be perceived to influence, the outcome of the application. The Chair shall require the committee member to withdraw from the AEP Committee's deliberations on any matter where a conflict of interest cannot be resolved.

(62) If the Chair declares a conflict of interest, the matter will be raised with the Provost for decision-making.

Confidentiality

(63) Confidentiality is required of all persons involved during and post the AEP evaluation process, which will be emphasised by the Chair at commencement of meetings. Access to all materials is restricted to those directly involved in the assessment process. Following the final meeting, access to materials will be removed (and any hard copies must be returned).

Part D - Employee responsibilities

Before / during the AEP

(64) Employees must keep a record of their AEP objectives, supporting documentation and the outcomes.

(65) Prior to commencing their AEP, employees must complete a work health and safety self-assessment related to the proposed location(s) of work associated with the AEP.

(66) Annual leave must be taken is accordance with the approved leave plan.

(67) While participating in the AEP, employees are expected to act with respect, integrity and professionalism and ensure their behaviour is:

a. appropriate to the purpose of the AEP;
b. consistent with the UQ's Code of Conduct, UQ values, policies, procedures and guidelines;
c. compliant with applicable laws and regulations; and
d. respectful of local beliefs and customs.

(68) Employees are responsible for undertaking their approved work plan within the ordinary hours described in their contract of employment.

(69) If, as part of an approved AEP, employees intend to receive payment from an organisation other than the University, they are required to adhere to UQ's Consultancy, Secondary Employment and Internal Work Policy and the relevant Procedures.

(70) If an AEP proposal involves work interstate or overseas, the employee must apply for workplace flexibility under the Flexible Work Policy and comply with the requirements of that Policy including clause 24 'Staff Responsibilities'.

(71) Employees are responsible for submitting a risk assessment in UQ Safe detailing the hazards and proposed treatments associated with specific tasks or activities to be undertaken as part of their AEP Project prior to the commencement of the AEP.

(72) Employees are responsible for managing any financial assistance or use of ACA funds to ensure costs incurred are within budget and for proper purposes such that FBT doesn't accrue in relation to any costs incurred.

(73) Employees are responsible for obtaining their own independent financial advice. Meeting any additional tax implications is the employee's responsibility.

(74) If the approved AEP involves international travel, employees are required to consider and meet the entry, visa, residency, and taxation requirements of all countries they are visiting, transiting through, or working in.

(75) UQ's Travel Policy does not apply to travel undertaken as part of an AEP. Employees are responsible for arranging and paying for their own travel arrangements. Travel cannot be arranged through UQ Travel provider FCM Travel Solutions.

(76) Employees are responsible for the cost of travel insurance for any private travel undertaken, which is not covered under UQ's travel insurance.

After the AEP

Reporting requirements

(77) Within two months of returning from the AEP, employees must submit a report to their supervisor, Head of Unit, and the Executive Dean/Institute Director.

(78) This report will:

a. Include an acquittal of costs incurred against financial assistance provided and any use of ACA funds as set out in their proposed budget, and
b. address the goals and anticipated outcomes outlined in the AEP application.

(79) The supervisor and Head of Unit will review the report and confirm whether the objectives of the AEP have been achieved, and the report is acceptable.

(80) Future AEP applications will not be considered where a prior AEP report has not been provided and accepted.

(81) Employees may also be required to undertake other relevant activities following an AEP (e.g., deliver a relevant presentation or seminar).

Part E - Employee benefits

(82) An AEP allows employees to be released from normal academic duties for up to six months to undertake a planned program of work in one or more of the academic performance domains.

(83) During an AEP, employees continue to receive their salary (and superannuation contributions) as if they were undertaking their normal academic duties. Leave entitlements and service-based entitlements continue to accrue.

(84) Employees will be covered by UQ's public liability and professional indemnity insurance for activities undertaken as part of an approved AEP.

(85) Travel undertaken in accordance with an approved AEP application, and for the purposes of conducting work pursuant to that approved AEP, will be covered by UQ's travel insurance and travellers will have access to ISOS.

(86) Employees may be provided with an amount of AEP financial support. This funding will be allocated to the employee's Academic Consultancy Account (ACA).

(87) However, employees are responsible for any travel costs for any travel undertaken as part of an AEP. Employees are also personally responsible for the cost of travel insurance for any private travel undertaken, which is not covered under UQ's travel insurance.

Section 4 - Roles, Responsibilities and Accountabilities

Academic Staff

(88) Academic staff are required to ensure they seek advice regarding their eligibility and application prior to submitting their documentation. They must also ensure that they comply with their obligations during and after their AEP.

Academic Supervisor

(89) Academic Supervisors are responsible for providing appropriate advice to staff regarding the AEP. They are also responsible for providing an objective recommendation to the Head of Unit on applications received, and any changes proposed to approved AEPs.

(90) Academic Supervisors are responsible for endorsing completed AEP reports.

Head of Unit

(91) Heads of Units are responsible for assessing applications and any changes proposed to approved AEPs, and providing a recommendation to the Chair of the AEP committee.

(92) Heads of Units are responsible for endorsing completed AEP reports.

Executive Dean/Institute Director

(93) The Executive Dean/Institute Director is responsible for the appointment and effective function of their Faculty/Institute AEP Committee and is the ultimate decision maker in respect of AEP applications.

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(94) The Executive Dean/Institute Director is responsible for producing an annual report on the AEP process within their Faculty/Institute.

Section 5 - Monitoring, Review and Assurance

(95) The Chief Human Resources Officer (or delegated authority) has responsibility for ensuring compliance with this Procedure and ensuring it is monitored and reviewed appropriately, including providing a report on outcomes to be considered by USET and Academic Board annually.

(96) An annual report must be submitted by each Chair to the Provost to assist with monitoring, review and quality assurance. The annual report must outline:

a. the number of AEP applications received (including an analysis of those that were successful/ unsuccessful, including gender information, location and duration of each program);
b. any other observations regarding the benefits (or disadvantages) of offering AEPs; and
c. the expenditure on AEP associated with the activities being reported.

Section 6 - Recording and Reporting

(97) Documentation associated with the AEP process will be retained within the Human Capital Management System (Workday) in the relevant staff member’s employee record.

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