

# Outside Studies Program Policy

## Section 1 - Purpose

(1) This Policy specifies how Macquarie University offers its Outside Studies Program (OSP) to academic staff. OSP is implemented through an OSP Fellowships program that incorporates two Fellowships, one Internal and the other External.

### Background

(2) Through the [Macquarie University Academic Staff Enterprise Agreement 2023](#), Macquarie University offers academic staff members an opportunity to undertake a structured program of sustained scholarship, research and associated developmental activities outside the University. It implements this through two (2) forms of OSP Fellowship – an Internal Fellowship within the Sydney metropolitan area (including at Macquarie University), and an External Fellowship undertaken elsewhere in Australia or overseas.

(3) The purpose of OSP is to contribute to Macquarie’s recognition as an internationally leading, transformative learning and research intensive University.

(4) Fellowships are intended to enhance the knowledge, skills and experience, connections and partnerships, access to new ideas and resources, and the international standing of its academic staff.

(5) Fellowship projects are expected to produce tangible research / Scholarship of Teaching and Learning (SOTL) outcomes through both the opportunity to engage with peers external to the University and the opportunity for an intense focus on research / SOTL projects.

### Scope

(6) This Policy applies to all permanent full-time and part-time academic staff members and certain academic staff appointed on a fixed-term contract in accordance with the Eligibility criteria of this Policy.

## Section 2 - Policy

(7) Fellowships will be offered by Macquarie University to effect its commitment to an Outside Studies Program as detailed in the [Macquarie University Academic Staff Enterprise Agreement 2023](#).

(8) There will be two types of Fellowships:

- a. Internal – for staff planning to spend most of their time in metropolitan Sydney (including at Macquarie University); and
- b. External – for staff planning to spend a continuous period of at least one (1) month of the total OSP at another institution / organisation within Australia (beyond metropolitan Sydney) or overseas.

(9) The maximum period of an OSP Fellowship will be six (6) months. All Fellowships are granted on the understanding that at the conclusion of the Fellowship period, the staff member will remain with Macquarie University to complete the necessary reporting requirements.

(10) The period of an OSP Fellowship cannot be spread over more than one half-year teaching period, unless this is proposed and approved in advance by the relevant Executive Dean.

(11) The University reserves the right not to grant a Fellowship.

## **Purpose**

(12) The purpose of the Fellowship Program is to:

- a. enhance the knowledge, skills and experience, access to new ideas and resources, and the international standing of our academic staff;
- b. encourage staff to establish and develop strong national and international research partnerships and collaborations with academic institutions, business and other organisations;
- c. foster new joint and cotutelle agreements with new and established partner institutions;
- d. encourage mobility of cotutelle and joint PhD supervisors between host institutions; and
- e. contribute to Macquarie's recognition as an internationally leading transformative learning and research intensive University.

## **Internal Fellowships**

(13) Internal Fellowships may be used to:

- a. undertake a program of research / SOTL based at Macquarie University, or other institutions / organisations in the Sydney metropolitan area, including shorter visits (less than two (2) months) to other institutions / organisations outside Sydney;
- b. write a book or other substantial publication or series of publications;
- c. complete a Higher Degree Research (HDR) thesis; and
- d. pursue the development of scholarship relating to teaching, professional and clinical studies or other aspects of scholarly development aligned to the University's mission.

## **External Fellowships**

(14) External Fellowships are designed to provide academic staff with an opportunity to undertake sustained collaborative research / SOTL activities at institutions or organisations outside the greater Sydney Metropolitan area. These Fellowships are to involve significant periods of interaction with colleagues at the host institution. Where the External Fellowship is not based at one host institution, the sites attended must form a coherent program of scholarly work.

(15) Conference attendance on its own is not considered a sufficient purpose to grant an External Fellowship.

## **Eligibility**

(16) At least three (3) years must have elapsed since the submission of an acceptable report on the last OSP undertaken and the beginning of a new period of OSP. For a new staff member there must be at least three (3) years between their commencement at Macquarie University and the start date of their proposed OSP Fellowship Program.

(17) Fellowships will be available to academic staff members who meet the University's definition of [Research Active](#) (adjusted on a proportional basis for part-time staff), are early career researchers, are Teaching and Leadership or Teaching/Industry/Commercial Academics, or are working towards completion of a relevant doctoral qualification or Higher Degree Research program.

(18) Teaching and Research Academics who do not meet the definition of [Research Active](#) may put forward a case for

exemption from this criterion. In these cases, the application must outline how the proposed Fellowship will help the staff member move towards meeting the [Research Active](#) definition. Particular consideration will be given where the definition has not been met due to family responsibilities, personal illness, a period of employment on a teaching or administration / service / management weighted workload or staff starting their research career. In all cases, staff must submit a well formulated research / SOTL plan, including a timeline and measurable outcomes.

(19) All applicants must have completed their [Development, Performance and Review](#) (DPR) in the preceding year.

(20) Staff who have previously undertaken OSP must have completed and submitted the required reports.

(21) A staff member cannot be awarded more than two Fellowships (including any previously taken as OSP) in any seven (7) year period.

(22) A staff member whose salary is paid by external funds is ineligible for consideration for OSP unless there is explicit provision for such a Program in the contract. The staff member must still meet all other eligibility requirements.

### **Fixed-term Staff**

(23) To be eligible to apply, staff on a fixed-term contract must:

- a. have completed at least three (3) years of full-time service (or the equivalent in part-time service);
- b. hold a current appointment with a total duration of at least three (3) years; and
- c. have a sufficient period remaining in their current appointment to allow the program to be taken up and a satisfactory report to be submitted.

### **Exception**

(24) An exception to one or more of these eligibility requirements may be considered for staff where documented health issues, parental leave or exceptional circumstances apply. Such exceptions must be approved by the relevant Executive Dean.

### **Application**

(25) Application for a Fellowship under the Outside Studies Program is to be made in the prescribed format and be lodged by the advertised deadline with the office of the relevant Executive Dean. Incomplete or late applications will not be accepted.

### **Approval**

(26) Approval will be based on:

- a. the quality of the proposed program, including evidence of clear and detailed planning, appropriate choice of host institution(s), and expected outcomes to be generated;
- b. the contribution of the OSP to University, Faculty and Department research / SOTL goals, and to the applicant's own career development;
- c. the submission of a report in accordance with policy following periods of OSP;
- d. the outcomes of any previous period of OSP; and
- e. the impact on the Department / Faculty teaching commitments.

(27) Approval is granted by the relevant Executive Dean. There is no entitlement to a Fellowship through OSP – all applications are assessed on the proposal, the benefit to the University and staff member, and the impact on the

organisation.

(28) There is an absolute maximum percentage of staff who can be awarded a Fellowship (internal and external) within a Faculty or academic unit per six (6) month OSP period.

(29) Any approval above the maximum (14% of the Academic staff within a Faculty or academic unit per six (6) month OSP period) must form part of the long-term research / SOTL plan of the Faculty and Department or academic unit, developed by the Executive Dean.

(30) Approval will not be granted to a staff member where the period of the Fellowship will seriously disrupt the work of the Faculty or Department or academic unit in the short term. If an application has been disallowed because the staff member cannot be released for such reasons, this will be taken into account when the OSP application is resubmitted in a subsequent period.

(31) The outcomes of a Fellowship are to be taken into account in the annual DPR process.

## **Conditions**

(32) A Fellowship is not a period of leave. A staff member who is awarded a Fellowship must:

- a. pursue their approved program of study / research diligently;
- b. respond to requests from the Head of Department, Dean, or Executive Dean;
- c. comply with University reporting requirements, including provision of publication or other data relating to government data collection or surveys, and answering student queries from previous study periods;
- d. meet reporting requirements associated with grants or contracts in which they are involved; and
- e. make supervision arrangements prior to commencement of the Fellowship that ensure effective, continuous HDR supervision.

(33) To meet insurance and Health and Safety requirements, all Fellows on OSP (both internal and external) must ensure their location and communication details are available at all times during the period of the Fellowship.

(34) It is expected that proposed OSP Fellowship activities including timetable and location will have been well planned and described fully in the application. Variation of approved Fellowship plans will be permitted only in exceptional circumstances. The Executive Dean must approve (in advance) any substantial changes to a Fellowship Program that has already been granted.

(35) Where a component of a Fellowship Program is not able to be completed for any reason other than parental leave or extended illness of the staff member or other family member (supported by medical certificates) that period will be considered abandoned unless approved otherwise by the Executive Dean.

(36) Undertaking activities that will result in additional remuneration must be approved in advance of accepting the Fellowship. All remuneration received during (and related to) a period of Fellowship must be declared to the Executive Dean.

(37) No overload payments for teaching at or on behalf of Macquarie University or related entities will be approved.

## **Recognition of Special Needs**

(38) In accordance with the University's goal of providing equal employment opportunities for all staff, the Executive Dean, when considering an application, will be sensitive to the special needs of individual staff arising from different career histories, including family responsibilities, or histories of special disadvantage. All applicants will still need to meet the eligibility requirements, unless approved otherwise by the relevant Executive Dean.

## **Funding**

(39) The award of a Fellowship under OSP comprises the full salary, entitlements and associated on-costs for the staff member for the period of the Fellowship. A grant-in-aid may also be provided to assist in meeting costs of travel, accommodation and other expenses directly related to the Program.

### **Grant-in-aid:**

(40) Grant-in-aid:

- a. a grant-in-aid will be available for all External Fellowships;
- b. the level of grant-in-aid funding will vary depending on the location of the Fellowship, whether the staff member is travelling alone, accompanied by a partner, and / or accompanied by a dependent child (or children); and
- c. each Faculty will provide details of the specific amounts available each year.

(41) For the purposes above:

- a. a dependent child will mean a child under the age of 18 years or, where undergoing full-time education at the date of their embarkation, up to the age of 21 years; and
- b. partners concurrently employed at Macquarie University, both of whom are proceeding at or about the same time on a Fellowship Program, will each be eligible for the funding applicable to a single person; only one claim for dependent children will be paid in these instances.

(42) Funding levels of the grant-in-aid will be reviewed each year.

## **Reporting**

(43) The Fellowship Program Report is to be submitted to the Executive Dean within one (1) calendar month of the end date of the OSP Fellowship.

(44) Eligibility for a subsequent OSP Fellowship will be based on:

- a. the submission date of an acceptable report;
- b. the actual contribution to University, Faculty and Department research / SOTL goals; and
- c. evidence of measurable quality research or other scholarly outcomes.

## **Management**

(45) The Executive Dean or Head of Department will make workload arrangements to ensure that long-term planning provides opportunities for all eligible staff to apply for a Fellowship Program.

(46) The administration of OSP Fellowships in each Faculty will be managed by the relevant Faculty.

## **Appeals**

(47) The Deputy Vice-Chancellor (Research) and Deputy Vice-Chancellor (Academic) will establish committees for appeals as appropriate to the reason for the appeal. The Appeals Committee will consider appeals based on procedural grounds only.

## **Section 3 - Procedures**

(48) Nil.

## **Section 4 - Guidelines**

(49) Nil.

## **Section 5 - Definitions**

(50) Nil.

## Status and Details

<b>Status</b>	Current
<b>Effective Date</b>	29th June 2023
<b>Review Date</b>	29th June 2026
<b>Approval Authority</b>	Vice-President, Professional Services
<b>Approval Date</b>	30th June 2023
<b>Expiry Date</b>	Not Applicable
<b>Responsible Executive</b>	Eric Knight Deputy Vice-Chancellor (People and Operations)
<b>Responsible Officer</b>	David Ward Chief People Officer
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