

Performance, Development & Education Policy (MPF1227)

1. Objectives

1.1. The University of Melbourne (University) recognises the importance of applying best practice in the assessment of the performance of its employees, as well as supporting education and development. Together, these encourage high performance and assist in the employee's future promotion and career aspirations.

2. Scope

2.1. This policy applies to:

- a) all continuing and fixed term professional employees at the University (all sections)
- b) all continuing and fixed term academic employees at the University (Education and Training and Staff Education Scheme sections only)
- c) certain specific academic executive leadership appointments, by exception

2.2. The accompanying [Performance Planning and Review Procedure \(MPF1147\)](#) provides a comprehensive outline of expectations around the Performance Planning and Review process for professional and specific academic staff affected by this policy. The Procedure also provides for the supervision of both professional and academic staff and the management of casual staff performance, therefore its relevance extends to all staff in full or part.

2.3. Aside from the Education and Training and Staff Education Scheme sections, the remainder of this policy does not apply to all other academic employees that do not hold a certain specific appointment as per 2.1(b), whereby the [Academic Appointments and Promotions Policy \(MPF1299\)](#) provides for their development and performance. The University provides a separate Performance Development Framework (PDF) for these academic employees, which is discussed in that policy.

2.4. Casual employees are not subject to the PDF but are instead subject to individual performance arrangements as determined by individual people managers

3. Authority

3.1. This Framework is made under the [University of Melbourne Act 2009 \(Vic\)](#) and [Vice-Chancellor Regulations](#) and clause 1.35 of the [University of Melbourne Enterprise Agreement 2024](#) ('Enterprise Agreement').

4. Policy

Performance and development planning and review

4.1. The Performance Development Framework for professional employees (PDF) is to be used in the planning, assessment and development of the performance of all continuing and fixed-term professional employees.

4.2. The PDF facilitates and supports Performance Review and Development meetings and feedback discussions:

- a) Performance review discussions are bi-annual, or held more often as required, and are based on key performance indicators that are established in reference to those of the department, people manager or role, and result in a formal rating.
- b) Performance development discussions should be viewed as continuous and ongoing in nature, providing a means for people managers to set clear goals and track progress and the employee to articulate their career

goals through a series of agreed development activities. Progress should be discussed at various points over the year.

4.3. The PDF:

- a) assists employees and their people managers to understand priorities, define goals, improve performance, and provide a basis for professional and career development, and is based around a continuous ongoing review of the employee's development activities to review progress and achievements;
- b) provides for the assessment of performance, based on objective criteria that are appropriate to the position, classification level and time fraction, and the operational requirements of the work area, while taking into account the personal circumstances of the employee;
- c) provides a basis for reward and recognition of high performance as provided under the [Remuneration and Benefits Procedure \(MPF1170\)](#);
- d) provides a basis for people managers to provide ongoing feedback, early intervention, and coaching to alleviate performance concerns prior to escalation to formal unsatisfactory performance procedures (clause 1.38.4 of the Enterprise Agreement); and
- e) provides a basis for people managers and employees to jointly manage unsatisfactory performance and, where relevant, provides a basis for disciplinary processes (see sections 4.5-4.7 below).]

4.4. Procedural principles relating to the PDF are set out in the [Performance Planning and Review Procedure \(MPF1147\)](#).

Unsatisfactory performance

4.5. The University will respond to, manage and where necessary take disciplinary action in relation to alleged unsatisfactory performance by a professional employee consistent with clauses 1.37 and 1.38 of the [Enterprise Agreement 2024](#) ('the Enterprise Agreement').

4.6. Procedural principles relating to Unsatisfactory Performance are outlined in clause 1.38 of the [Enterprise Agreement 2024](#).

4.7. The [Remuneration and Benefits Procedure \(MPF1170\)](#) provides relevant information on the matters listed above, in addition to the Enterprise Agreement.

Confidentiality

4.8. The people manager must ensure that the outcomes of performance review discussions under the PDF are recorded in writing and stored securely and confidentially. Details of all performance reviews and feedback discussions under the PDF shall be managed in accordance with the [Privacy Policy \(MPF1104\)](#) and the University's Privacy Statements.

Education and training

4.9. The University may support continuing and fixed term academic and professional employees to complete approved courses of study in order to benefit development in their role and future career aspirations.

4.10. Continuing and fixed term employees who have completed their probationary period may apply for paid study leave under section 5.7 of the [Leave Policy \(MPF1343\)](#) to undertake an approved course of study.

4.11. The University offers eligible employees (as defined) and their eligible family members (as defined) the opportunity to study an approved course of study (as defined) at a reduced course fee of up to 25% of the usual course fee ('University study fee discount'). NOTE: The discount relates to the course fee and does not include incidentals such as travel and books.

4.12. The following additional eligibility requirements apply to the University study fee discount:

a) For eligible staff members:

- i. The discount is contingent on the University checking the applicant's employment status;
- ii. The discount is contingent on the employee submitting the University Fee Discount Application Form (HR70) by the appropriate census date;
- iii. The discount is applicable pro rata depending on the time fraction of the employee;
- iv. The discount, and any salary packaging, ceases at the termination of employment or a change in their employment status that renders them ineligible.

b) For eligible family members: The fee discount described in 4.12.1 is also available to immediate family members of both the staff member and the staff member's spouse subject to the following conditions:

- i. The relationship must be active when the application is lodged.
- ii. Relationships upon which eligibility depends must be current.
- iii. Discount will be applied pro-rata depending on the time fraction of the staff member.

4.13. The discount does not apply where the employee is in receipt of any other discount, bursary or scholarship provided by the Government, Commonwealth, University or Faculty of the University.

4.14. An employee may salary package University of Melbourne course fees (see the [Remuneration and other Benefits Policy \(MPF1223\)](#)).

4.15. Any changes to the courses exempt from the study fee discounts (sections 4.11 to 4.14 of this Policy) as detailed in [Schedule A](#) to this Policy and listed in the associated [article](#) must be approved by the Academic Registrar. For the avoidance of doubt, where there is discrepancy between the article and the Schedule, the Schedule shall prevail.

Temporary secondments

4.16. To support professional development, the University at its discretion may approve a temporary secondment (internal transfer or external to the university within Australia) for a professional employee. For further information:

- a) [Recruitment and Appointments Procedure \(MPF1159\)](#) for further details on internal transfers; and
- b) [External Secondments \(Professional Employees\) Procedure \(MPF1220\)](#) for further details on external secondments within Australia.

5. Procedural principles

Education and training

5.1. Eligible employees wishing to apply for the University study fee discount under section 4.16 are directed to the following [guidance](#) on how to apply.

Staff Education Scheme

5.2. An eligible professional employee is a professional employee who has completed the probation period and is:

- a) a continuing employee, or
- b) a fixed-term member of staff with at least 12 months service and at least a further 12 months appointment in prospect.

5.3. A recognised course of study is a course of study, including a special or bridging course, that leads to a recognised qualification from an institution acceptable to the University such as:

- a) a university
- b) a TAFE college
- c) any other accredited course at a tertiary institution or professional organisation, that may be undertaken by course work, distance education or web-based learning.

5.4. An eligible professional employee who wishes to participate in the Staff Education Scheme by undertaking a recognised course of study may apply in writing for study leave under the Scheme to their people manager at least three months before the course commences. The application should include the following information:

- a) length of service with the University
- b) name of course
- c) institution
- d) a copy of the completed course application form
- e) name of subject/s
- f) year of course
- g) a statement regarding the applicability of the degree to their job
- h) study leave requested.

5.5. The people manager may, having regard to the operating efficiency of the department, approve study leave for an eligible professional employee to undertake a recognised course of study which will:

- a) assist the employee's professional development or career development, even if the course or subject is not directly related to their current work
- b) meet the University's skill development needs
- c) develop the individual's skills relevant to the higher education sector.

5.6. The following weekly study leave is allowed to a full-time employee who has obtained approval for study leave:

- a) up to 4 hours of paid leave per week for lectures or up to 6 hours of paid leave per week if practical classes are involved
- b) examination preparation leave of 4 hours of paid leave per examination.

The employee will endeavour to provide advance notice of any absence under the Staff Education Scheme.

5.7. A full-time employee who has obtained approval to undertake a recognised course by distance education, web-based learning, compulsory residential school or practical sessions, may be allowed study leave of 2.5 days per subject up to a maximum of 5 days per semester, in lieu of weekly study leave.

5.8. A full-time employee who has obtained approval to undertake a research-based degree (where at least 50% of the course assessment is based on original research and the production of a thesis) is entitled to 5 days study leave per semester for the research component of the course.

5.9. A part-time employee is entitled to pro-rata study leave.

5.10. An employee may use study leave for the purposes of:

- a) attendance at lectures, tutorials, residential schools, field days, etc., where these are held during working hours
- b) necessary travel during working hours to attend lectures, tutorials, residential schools, field days, etc. held during or outside working hours
- c) private study associated with examination preparation or research leading to a thesis.

5.11. An employee who has obtained approval for study leave may take study leave:

- a) during semester time
- b) for intensive courses run outside of normal semester time
- c) official summer schools.

5.12. Study leave is not available:

- a) for classes held outside normal working hours or on a public holiday
- b) after the last day of classes
- c) if an emergency situation arises in the work unit and the employee's attendance is required
- d) for a failed subject, unless study leave was not previously approved for that subject or the member of staff can demonstrate that the reasons for not passing the course at first attempt were outside of their control.

5.13. An employee may, with the approval of their people manager or head of school or unit, vary working arrangements to allow for study leave to be taken in normal working hours in addition to the time granted as study leave. The employee will make up the additional time taken in this way at times agreed with the people manager or head of school or unit. Making up time is not permitted during a lunch break.

5.14. An employee will notify their people manager immediately if they discontinue a course or subject for which study leave has been granted. Any study leave taken after discontinuing a course will be charged to annual leave, flexi-leave or long service leave or taken as leave without pay.

6. Related documents

- [University of Melbourne Enterprise Agreement 2024](#)
- [Performance Planning and Review Procedure \(MPF1147\)](#)
- [Academic Appointment, Performance and Promotion Policy \(MPF1299\)](#)
- [Schedule A - Specific course schedule for study fee discounts for eligible academic and professional employees](#)
- [Knowledge Base Article KB0022258](#)

7. Definitions

7.1. For the purpose of section 4.11, **approved course of study** means:

- a) All local and international full fee paying [graduate award courses](#) offered by the University of Melbourne and the [Community Access Program](#) (at both Undergraduate and Postgraduate levels) are eligible with the exception or inclusion of those listed in [Schedule A \(Section 1\)](#)
- b) Courses and programs offered by University of Melbourne affiliates are not automatically eligible for employee study fee discounts unless the course or program is listed in [Schedule A \(Section 2\)](#).
- c) The course or program does not need to have a work-related purpose.

7.2. For the purpose of section 4.11 and 4.12, **eligible employees** mean:

- a) Academic or professional (PASO) staff; and
- b) Continuing members of staff, either part or full time or
- c) Fixed term members of staff with at least 12 months remaining in their appointment at the time of course commencement

Note: Staff of University of Melbourne Affiliates, casual and honorary staff are not entitled to a fee discount.

7.3. For the purpose of section 4.11 and 4.12, **immediate family members** include:

a) For the staff member:

- i. Spouse (including defacto spouse and domestic partner)
- ii. Child (including adopted / step child)
- iii. Grandchild (including adopted / step grandchild)
- iv. Parent / step parent
- v. Grandparent / step grandparent
- vi. Sibling / step sibling / half sibling

b) For the staff member's spouse:

- i. Child (including adopted / step child)
- ii. Grandchild (including adopted / step grandchild)
- iii. Parent / step parent
- iv. Grandparent / step grandparent
- v. Sibling / step sibling / half sibling

For the avoidance of doubt, inclusive and gender neutral terms should be assumed where applicable.

POLICY APPROVER

The Deputy Vice-Chancellor (People & Community) is responsible for the development, compliance monitoring and review of this policy.

The Chief People Officer is responsible for the development, compliance monitoring and review of [Schedule A](#) to this Policy from time to time.

POLICY STEWARD

The Chief People Officer is responsible for the promulgation and implementation of this policy in accordance with the scope outlined above. Enquiries about interpretation of this policy should be directed to the Implementation Officer.

REVIEW

This procedure is to be reviewed by 30 September 2028.