Outside Studies Program (OSP)  
Teaching & Leadership (TL) Fellowship  
Funding Rules 2023

Submission: The application, including the Head of School/Department’s comment and signature, must be emailed to the Head of Faculty Operations (meredith.hallgren@mq.edu.au) prior to the deadline.

Faculty Contact: linda.beaumont@mq.edu.au

Key Dates:

<table>
<thead>
<tr>
<th>Scheme Opening Date</th>
<th>8 August 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheme Closing Date</td>
<td>1 September 2022</td>
</tr>
<tr>
<td>Outcome Notification Date</td>
<td>29 September 2022</td>
</tr>
<tr>
<td>OSP Period 1</td>
<td>First half of 2023</td>
</tr>
<tr>
<td>OSP Period 2</td>
<td>Second half of 2023</td>
</tr>
</tbody>
</table>
# Table of Contents

1. PURPOSE OF SCHEME ................................................................. 3
2. FUNDING ................................................................................. 4
3. ELIGIBILITY ............................................................................ 5
4. APPLICATION PREPARATION / PROJECT OUTLINE .............. 5
5. SELECTION CRITERIA .............................................................. 6
6. BUDGET .................................................................................. 6
7. CERTIFICATION ...................................................................... 7
8. APPLICATION PROCESS ......................................................... 7
9. ASSESSMENT PROCESS .......................................................... 7
10. APPEALS ............................................................................... 7
11. CONDITIONS OF AWARD .................................................... 8
12. VARIATION ............................................................................ 8
13. REPORTING .......................................................................... 9
14. ADDITIONAL CONDITIONS OF AWARD ............................. 9
1. PURPOSE OF SCHEME

Through its Enterprise Agreement, Macquarie University offers academic staff an opportunity to undertake a structured program of sustained scholarship, research and associated developmental activities outside the University. Previously, this opportunity has been available to research active academics, but as part of an ongoing commitment to provide recognition and development opportunities to those academics in teaching and leadership positions, the University, through Faculties, has also implemented Outside Studies Program for Teaching and Leadership academics (OSPTL). The guidelines in this document address the FSE OSPTL Fellowships.

The overall aim of an OSPTL is to allow staff to develop their learning and teaching capacity by interacting with leading practitioners elsewhere, to develop new pedagogic practices and resources with external partners and organisations, and to increase and disseminate the practical outcomes of a Fellowship more broadly across the University, home Faculty, and Schools/Departments. It is expected that upon returning from an OPSTL Fellowship, academics will make use of Macquarie programs, such as the Faculty Education Group to implement and champion the practical outcomes achieved.

The University implements this Outside Studies Program (OSP) through two types of Fellowships:

- **Internal Fellowships** – for staff planning to spend most of their time in metropolitan Sydney (including at Macquarie University); and
- **External Fellowships** – for staff planning to spend a total period of at least one month of the Fellowship at one or multiple other institutions/organisations within Australia (beyond metropolitan Sydney) or overseas.

The maximum period of an OSPTL Fellowship will be six months.

The purpose of an OSPTL Fellowship is to:

- enhance the knowledge, skills and experience, access to new ideas and resources, and the capacity of our Teaching and Leadership academic staff;
- encourage staff to establish and develop strong national and international research partnerships and collaborations with academic institutions, business and other organisations in the learning and teaching space; and
- contribute to Macquarie’s on-going development as a centre for innovative and effective learning and teaching practice.

OSPTL Fellowship programs shall produce tangible outcomes through both the opportunity to engage with peers and partners external to the University, and the opportunity for developing and disseminating innovative and effective learning and teaching practice over the longer term at Macquarie.

OSPTL Fellowships are not intended to allow for a period of research into the scholarship of learning and teaching, and research outputs or publications should not be a substantive part of the projected outcomes of an OPSTL.

All continuing full-time and part-time Academic Staff, who plan to undertake a structured program of sustained scholarship, are eligible to apply for OSP in accordance with the University’s Outside Studies Program Policy in place from time
to time. There is no entitlement to an OSP Fellowship – all applications are assessed based on the selection criteria. The University reserves the right not to grant a Fellowship.

There is an absolute maximum percentage of staff (maximum of 14% of the staff of the Faculty) who can be awarded an OSP Fellowship (Internal and External) at any one time and the provision of both OSP Research and OSPTL Fellowships will fall within this maximum.

The period of OSPTL Fellowship cannot be spread over more than one half year teaching period unless it is approved in advance by the relevant Head. An OSPTL Fellowship will not be granted to a staff member where the period of the Fellowship will seriously disrupt the work of the Faculty or School/Department in the short term. If an application has been disallowed because the staff member cannot be released for such reasons, this will be considered when the application is resubmitted in a subsequent application round.

The outcomes of an OSPTL Fellowship are to be considered in the annual Development, Performance, and Review (DPR) process.

2. FUNDING

2.1 The primary form of funding for OSPTL Fellowships is a grant of salary for a period of scholarship activity as defined in the approved application.

2.2 A grant-in-aid to assist in meeting travel and associated accommodation costs may be awarded for External Fellowships. The grant-in-aid assists with travel and associated costs and takes into account the location of host institutions/organisations.

2.3 Grant-in-aid funding varies depending on whether the staff member is travelling alone, accompanied by a partner, and/or accompanied by a dependent child (or children).

2.4 A dependent child is 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.

2.5 Partners concurrently employed at Macquarie University, both of whom are proceeding at, or about, the same time on an OSP Fellowship, are both eligible for the travel grant applicable to a single person. NOTE: only one claim for dependent children will be paid in these instances.

2.6 The funding level of grants-in-aid will be reviewed each year (an increase of 2% applied annually). In 2023, maximum funding will be provided as follows:

<table>
<thead>
<tr>
<th>Staff member travelling alone</th>
<th>$6,290</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accompanied by partner (or dependent child without partner)</td>
<td>$2,062</td>
</tr>
<tr>
<td>Each additional dependent child</td>
<td>$763</td>
</tr>
</tbody>
</table>

2.7 Fringe Benefits Tax (FBT)
The University/Faculty has the obligation to pay any Fringe Benefits Tax (FBT), that may be applicable to funding for non-staff travellers i.e. partner/child(ren). OSPTL Fellows MUST factor in the FBT cost applicable to their partner/child(ren) in their
FBT is calculated, dependent on the type of expense incurred, at an additional cost of up to 100% of the original expense incurred. If FBT is incurred, and not calculated inclusively as part of the grant in-aid, the OSPTL Fellow will be required to personally cover all additional FBT expenses incurred. The Faculty/School/Department will not cover FBT costs incurred over & above grant in aid amount awarded.

Information on FBT amounts and categories of expenses to which FBT applies can be found on the Macquarie website: https://policies.mq.edu.au/document/view.php?id=117.

For further information, please visit the ATO website: https://www.ato.gov.au/rates/fbt/ or check with your Faculty Finance Team if you need more information on how to prioritise your budget.

3. ELIGIBILITY

3.1 Applicants for an OSPTL Fellowship must be a member of the University’s academic staff. Applicants must be employed under the Teaching and Leadership appointment.

3.2 Applicants must have been in a teaching and leadership role for a period of three years prior to the commencement of an OSPTL. In all cases, staff must submit a well-formulated study and professional development plan, including a timeline and measurable outcomes.

3.3 An exception to one or more of the above eligibility requirements may be considered for staff where documented health issues or parental leave have intervened, or where other exceptional circumstances apply. Such exceptions require the prior recommendation of the relevant Executive Dean/Dean.

3.4 Where an applicant has previously undertaken an OSPTL Fellowship, at least three years must have elapsed between the end date of the most recent OSPTL Fellowship and the commencement date of the proposed Fellowship. Should the Executive Dean advise of a late penalty to apply for a late OSPTL report, the date of the penalty will be taken instead of the OSPTL end date. Eligible staff who are new to the University must have at least three years’ service between their commencement at the University and the start date of the proposed OSPTL.

MQ Human Resources will confirm the eligibility of applicants after the OSPTL application closing deadline.

3.5 A staff member cannot have been awarded more than two OSPTL Fellowships in any seven-year period.

4. APPLICATION PREPARATION / PROJECT OUTLINE

4.1 The Detailed Program Description should demonstrate clear evidence of good, detailed planning. It should be ambitious but credible and include evidence that pre-pre-OSPTL preparation is part of the plan so the applicant will hit the ground running.
once the OSPTL period commences.

In no more than three and a half A4 pages (approximately 1700 words), provide the following information:

- **Background** - Briefly describe the background to the program. Include relevant information about developments or research on the proposed learning and teaching program or innovation, and its relationship to potential developments at Macquarie.

- **Aims & Significance** - Describe the program aims and how the proposed project addresses an important problem or area for development within learning and teaching at Macquarie.

- **Plan** - Outline the plan for the program or project, including, where appropriate design and methods, and demonstrate that these are adequately developed, well integrated and appropriate to the aims of the program or project. Detail any new methodologies or technologies that will be developed. This plan should also explain the importance of the program’s location. In particular, link the activities happening at the host institutions with the OSPTL plan. You should also include some explanation of how you plan to implement and extend the outcomes of the program into teaching at Macquarie once the OSPTL period is complete.

- **Benefit** - Describe the main outcomes to be expected for the program and how they will benefit the University.

- **References** - to be included in the three-and-half page limit.

The information in this section must be set out simply and clearly, in plain English, such that individuals who are not experts in the field can understand the proposed research and how it is to be achieved.

5. **SELECTION CRITERIA**

Applications will be assessed on the following criteria:

- the quality of the proposed program, including evidence of clear and detailed planning, appropriate choice of host institution(s) or external partner and what practical outcomes in the learning and teaching space will be generated;

- the contribution of the OSPTL to University, Faculty and School/Department learning and teaching goals, and to your own career development;

- the proposed follow-up/implementation plan for the period after OSPTL;

- the outcomes of any previous period of OSPTL;

- the impact on the workload of the School/Department; and

- any other criteria the faculty deems applicable.

6. **BUDGET**

The primary form of funding for OSPTL Fellowships is a grant of salary for a period of research and scholarship activity as defined in the approved application.

Applicants requesting a Grant-in-Aid will be required to provide a justification of the requested travel grant in relation to each requested item. Justification of a budget is not merely stating proposed expenditure. Researchers must **provide an explanation** as to why that particular expenditure item is essential.
7. CERTIFICATION

The applicant must include their Head of School/Department’s comments on the alignment of the proposed OSPTL program with the applicant’s career development program and the Faculty’s learning and teaching strategy on the application form.

By providing this comment and signature, the Head of School/Department confirms that the planned program can be accommodated within the workloads of the School/Department and in respect to the commitments identified in the application.

8. APPLICATION PROCESS

The application form is available via email from meredith.hallgren@mq.edu.au

Applications must be in the prescribed format using no smaller than 12-point font, and the layout of the form must not be altered. References may be in 10-point font.

The application, including the Head of School/Department’s comment and signature, must be emailed to meredith.hallgren@mq.edu.au prior to the deadline.

<table>
<thead>
<tr>
<th>Closing Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 pm on Thursday, 1 September 2022</td>
</tr>
</tbody>
</table>

Late applications will not be accepted, and incomplete applications will be deemed ineligible.

9. ASSESSMENT PROCESS

Applications will be checked against eligibility reports sent by the MQ Human Resources Office. Eligible applications will be assessed by the Faculty OSPTL Fellowship Assessment Panel. The Panel will make a recommendation to the Executive Dean, who will make the final decision. The Faculty Office will announce the final outcome to the applicants with a copy to the Post Award team and HR.

<table>
<thead>
<tr>
<th>Date of Outcome Notification</th>
</tr>
</thead>
<tbody>
<tr>
<td>29 September 2022</td>
</tr>
</tbody>
</table>

10. APPEALS

Unsuccessful applicants have the right to seek a review of outcome, on procedural grounds only.

To request a review of outcome, please write a brief letter detailing the basis on which the review is requested. The letter clearly marked “Confidential Appeal”, should be submitted to the Head of Faculty Operations (meredith.hallgren@mq.edu.au).
11. CONDITIONS OF AWARD

OSPTL recipients are reminded that an OSP Fellowship is not a period of leave and must comply with all conditions outlined below.

11.1 Recipients must complete the program according to the plan approved in the application form.

11.2 Recipients must respond to requests from the Head of School/Department or Executive Dean/Dean throughout the duration of the OSP period.

11.3 Recipients must comply with University reporting requirements throughout the duration of the OSP period, including provision of publication or other data relating to government data collection or surveys, and answering student queries from previous study periods.

11.4 Recipients must meet reporting requirements associated with grants or contracts in which they are involved throughout the duration of the OSP period.

11.5 Recipients must make supervision arrangements prior to commencement of the Fellowship that ensure effective, continuous HDR supervision.

11.6 To meet Occupational Health and Safety requirements, all Fellows must ensure their location and communication details are available at all times during the period of the OSP Fellowship as laid out in the approved program.

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

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

11.9 Recipients must ensure they do not accrue and excessive annual leave balance by the conclusion of the Fellowship.

12. VARIATION

Requests for variation of the specific OSPTL Fellowship program outlined in the application must be submitted on the appropriate form available from the Head of Faculty Operations by request.

Variation to an approved OSPTL Fellowship program, including timing of activities and location(s), will be approved only in exceptional circumstances. The Executive Dean must approve (in advance) any substantial changes to a Fellowship Program that has already been granted.

In a case where the variation is substantial, and likely to detract from specified outcomes of the program, the University reserves the right to cancel the OSPTL Fellowship.

Inadequate planning in respect of host institution(s), timing or resources **will not**
be considered an acceptable reason for variation of an approved OSPTL Fellowship.

Where a component of an OSPTL 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 as a variation to the program.

Changes to annual leave can be made via Workday in consultation with your supervisor and Head of School/Department, provided these do not impact on key aspects of the OSPTL program that would require a formal variation request.

Questions relating to Variations should be directed to meredith.hallgren@mq.edu.au.

13. REPORTING

The OSPTL Fellowship Final Report is to be submitted to the Head of Faculty Operations and the Deputy Dean Education and Employability within six calendar months of the end date of the program. Each Faculty may request that additional internal reports are submitted at other times.

Eligibility for a subsequent OSPTL Fellowship Program will be based on:

- the submission date of an acceptable report signed by the Head of School/Department to the Head of Faculty Operations;
- the actual contribution to University, Faculty and School learning and teaching goals and strategy; and
- evidence of measurable quality outcomes.

The Final Report template is available by request from the Head of Faculty Operations. The reports should be submitted by email to meredith.hallgren@mq.edu.au.

14. ADDITIONAL CONDITIONS OF AWARD

The assessment panel, in recommending the award of an OSPTL Fellowship may stipulate other conditions of award for approval of the Executive Dean. Additional conditions of award, if relevant, will be contained in the notification of outcome to the applicant.