



**UNIVERSITY OF  
LIMERICK**  
OLLSCOIL LUIMNIGH

# **FURTHER STUDY POLICY**

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# 1 Introduction

## 1.1 Purpose

The University of Limerick encourages all staff to undertake programmes of further study in order to both enable employees to fulfil their potential and to support the University in achieving its existing and future strategic objectives.

This policy explains how the University will support qualifying employees who wish to enhance their job performance by undertaking a course of further study.

## 1.2 Scope

### 1.2.1 *To whom does the policy apply?*

#### *Service Criteria*

Applicants must be employed by the University (whether permanent, multi-annual, contract of indefinite duration or fixed term) at the time of application and for a period of 24 months post the conclusion date of the course. In cases of specific purpose contracts, the Dean will make an informed decision on whether this can be deemed to meet the criteria<sup>1</sup>.

#### *Course Criteria*

The course of study should be relevant to the employee's job role, be part of an agreed development plan and there should be evidence that the employee is both likely to successfully complete the programme and be able to bring the skills and development achieved to bear for the 24-month post qualification period (defined as 24 months after formal notification of final grade). The employee should meet all eligibility criteria for the course of study e.g., minimum qualifications and/or experience.

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<sup>1</sup>The objective justification for this criteria is to ensure the University is able to benefit from the funded course in terms of retaining the service of the enhanced and additionally qualified employee within employment at the University, with 24 months having been assessed as a reasonable, necessary, minimum post qualification period in that regard.

### *Other Criteria*

- (i) Employees apply and participate in the full knowledge and understanding that the course is likely to require a high degree of commitment of their own time and they are required to ensure their current workload is managed and not adversely impacted.
- (ii) They have access to any equipment / resources stipulated for the course.
- (iii) They are currently able to manage their workload.

### **1.2.2 In what situations does the policy apply?**

A further study course is defined as one that lasts for six months or more and leads to a recognised qualification. The scheme does not apply for short courses or conferences.

The policy also outlines the criteria that will be used to consider applications for further study. The University is keen to support personal development, which can contribute towards the achievement of organisational objectives and encourage learning within the organisation. However, all decisions are subject at all times to considerations around departmental and HR budgets.

Where an individual is offered a position in the organisation and is already part way through a course of accredited development, an application can be made for sponsorship to complete the course. This will be subject to the approvals outlined in this policy and in the Further Study Application Form.

Please see separate procedures for the following programmes:

- Graduate Diploma in Teaching and Learning and Masters in Teaching Learning and Scholarship through the Centre for Teaching and Learning.
- Short language courses through Aonad na Gaeilge and Language Outreach Programme.

### *Criteria for Funding*

The following criteria will be used to assess whether sponsorship for the course of further education will be approved:

- There are no outstanding performance issues.
- They are able to manage their current workload.
- The course of study is relevant to their current or future role.
- They meet the eligibility criteria for the course.

- If the programme is offered at UL, staff are normally required to study within UL as opposed to another organisation.
- If staff apply to study a programme at another organisation, where the same is offered at UL, they must provide a strong written justification for same, and attain HR approval.
- Attendance at the course or other periods of study leave will have minimal operational impact, which can be accommodated within the section concerned.
- There is significant opportunity to apply their learning in their current role and share their learning with their colleagues.
- Preference will be given to employees applying for their first professional qualification.
- Preference will be given to a course required for a current role, over that for a future role.

Even when an employee meets all these criteria, there is no guarantee of sponsorship. For internal courses, this is subject to approval by the Line Manager and the Head of Department and the Dean, or the Line Manager and Head of Division. For external courses, this is subject to approval by the Line Manager and Head of Department and the Dean, or Line Manager and the Head of Division, as well as the HR Division.

#### *Conditions of Funding*

Cognisance must be taken of the financial constraints operating within the University at the time of any application. Where agreed, 50% of the cost of the programme will be covered by individual Faculties/Divisions and 50% by HR.

Applications must be made on a yearly basis and continuation is contingent on annual approval. Where staff have been granted express authority to undertake programmes outside of the University of Limerick, they must ensure that the relevant institution is made aware that they are being sponsored and must personally ensure that all invoices relating to the programme are processed in a timely manner, following full approval of the Further Study Form. Individuals will be responsible for any late charges.

Any financial commitment of the University to an overall cost exceeding €10,000 requires the further approval of the Director, Human Resources & Communications. Members of Executive Committee must have any further study programme approved by the President.

Payment for repeats or examination rechecks will not be refunded.

Any other expenses associated with completion of this course will be dealt with separately and in line with University's Travel and Subsistence Policy.

Staff in receipt of financial assistance for Further Study will be required to remain in the employment of the University of Limerick for at least 24 months post-qualification period. In instances where an employee resigns or terminates their employment prior to the conclusion of the 24 month post qualification period, the employee commits as part of an express term of the agreement entered into between the parties to reimburse the University for the financial cost of the sponsorship or support granted. The fee amount will be recouped on a pro rata basis up to 24 months. It will be the responsibility of both the employee and the line manager/HoD to inform the Finance Division that the employee is leaving and the course fees are to be recouped. The employee will be expected to indicate this on the "Termination of Employment Form."

In furtherance of the above, in applying for sponsorship or financial assistance, the Applicant acknowledges any successful application made pursuant to the terms of this policy, of itself grants the University authorisation and prior written consent to deduct sums due and owing from their wages for any claw back payments arising in line with the terms of the Payment of Wages Act. Nothing in this provision shall impact on any other legal rights of recourse available and reserved by the University in pursuing any such claw back payment that may fall due.

Acceptance by the employee of the financial assistance provided will be taken as acceptance of the terms of this policy.

### **1.2.3 *Who is responsible for ensuring that the policy (and any associated procedure) is implemented and monitored?***

Implementation and monitoring of this policy will reside with the Human Resources Division.

Approval to undertake further study programmes is the responsibility of the Line Manager and Dean/Head of Division for internal programmes and the responsibility of the Line Manager and Dean/Head of Division and HR for external programmes. It is the responsibility of each individual availing of further study to ensure that any reimbursement is made if they end employment with the University within two years post qualification. The individual's manager is responsible for ensuring that this is implemented.

### **1.3 Definitions**

A further study course is defined as one that lasts for six months or more and leads to a recognised qualification. The scheme does not apply for short courses or conferences.

## **2 Context**

The University of Limerick encourages all staff to undertake programmes of further study in order to both enable employees to fulfil their potential and to support the University in achieving its existing and future strategic objectives.

## **3 Policy Statements**

### **3.1 Principles for Further Study Policy**

#### ***3.1.1 Staff Have Suitable Skills to Deliver University Goals***

University staff must have the relevant qualifications and skillset to deliver the goals of the University.

#### ***3.1.2 Supporting Staff Development***

The University is committed to the continued professional development of staff.

#### ***3.1.3 Budgetary Considerations***

Consideration must be given to the budgetary situation that applies at the time of first application and for each subsequent year.

## **4 Related Procedures for Further Study Policy**

### **4.1 Discussion of Proposed Course of Further Study**

The employee should discuss the course with his / her line manager to ensure it is relevant to his / her role and development plan.

## **4.2 Completion and Submission of Further Study Application Form**

The employee should complete the Further Study Application Forms (ref: TF012/TF013) and pass it to his / her Head of Department and Dean, or Line Manager and Head of Division. The forms must be sent to Human Resources. Forms must arrive by 1st June for September start dates, or by 1st November for a course starting early in the following year. No late applications will be considered.

## **4.3 Approval**

The employee will then be contacted by HR to confirm whether their request has been approved or not. No assumption of support can be made without this confirmation.

## **4.4 Payment for External Programmes (where applicable)**

Payment of external institutions can only be made following approval. Where financial support from the HR Division has been approved, payment will be made in full by the relevant department/division. The HR Division will then reimburse 50% to the relevant cost code.

# **5 Responsibilities**

## **5.1 What is My Responsibility as a Manager?**

As a manager, you are responsible for:

Identifying with the employee the further education course that will support their development needs and ensure it is in line with service and corporate plans.

Deciding whether the impact of undertaking this course of study is reasonable for the Department/Division in line with organisational needs and the employee's work responsibilities. Reasonable time off to attend lectures, workshops etc. should be agreed and documented in advance.

For subsequent years, seeking evidence of satisfactory progress.

Processing of invoices for external institutions in a timely manner.

Forwarding a copy of final certification to the HR Division for filing.

To inform the Finance Division if the employee leaves employment of the University of Limerick within 24 months post qualification so that course fees can be recouped and ensuring that course fees are recouped.

## **5.2 What is My Responsibility as an Employee?**

As an employee, you are responsible for:

- Complying with the sponsorship procedure by completing all sections of the nomination form in full and on time.
- Providing annual evidence of progress to your manager prior to application for the next year of study.
- Identifying opportunities to transfer your learning to the workplace and sharing information with colleagues.
- Planning your study time in the most effective way to minimise operational impact, whilst ensuring individual success. This must be by agreement with your Line Manager.
- Complying with the conditions of the course i.e. attend on the days required, submit course-work by the deadlines set.
- Reimbursing fees to the University if service does not extend to at least 24 months post qualification.

## **6 Related Documents**

This policy should be read in conjunction with the following:

- (i) Further Study Application Form – Initial Approval
- (ii) Further Study Application Form – Subsequent Years
- (iii) Conferring Leave
- (iv) Exam Leave
- (v) Travel and Subsistence Policy

## 7 Document Control

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