



## Operations Division Conference Leave and Funding Policy

**Date Policy took effect** 30<sup>th</sup> August 2016

**Responsible Officer** Chief Operating Officer

**Last Reviewed** February 2018

**Review date** February 2023

### Purpose

The purpose of this policy is to define the criteria, application process and approval delegations for Conference Leave and Funding within the Operations Division. This should be read in conjunction with the *Operations Guidelines for Conference Attendance*.

### Organisational Scope

The policy applies to all Departments and work groups of the Divisions of the Operations Group i.e. Campus and Collegiate Life Services Division, Campus Development Division, Health & Safety Compliance Office, Information Technology Services Division, Project Management Office, Property Services Division, Shared Services Division, Office of Sustainability and the Office of Risk, Assurance and Compliance.

### Content

#### Summary:

Any member of staff seeking funding and leave to attend a conference must obtain approval by completing the *Operations Division Application for Conference Leave and Funding Form*. The approved period of leave will normally be for the period of attendance at the conference, together with the minimal reasonable period for travel to and from the University. Any leave in excess of this minimum will normally be taken as annual leave.

#### Approval Process:

Applications for approval of conferences should normally be submitted at least six weeks before the proposed departure date. Applications must be made using the *Operations Division Application for Conference Leave and Funding Form*, which must include details of:

- The name and venue of conference
- Dates of conference
- Proposed inclusive dates of absence from the University
- Purpose of attendance at the conference
- How the applicant intends to utilise and share learnings from the conference or course
- A detailed outline of the costs of attending the conference and the funding being sought

Attendance and funding for **domestic** conferences must be approved by Divisional Heads on the recommendation of the staff member's manager.

Attendance and funding for **International** conferences must be approved by the Chief Operating Officer on the recommendation of Divisional Heads.

**Required Criteria:**

1. Does attendance at the conference align to the Operations Group Strategic Priority Plan?
2. Has the staff member to be attending achieved a suitable PDR outcome? A minimum of 'meeting expectations' and preferably 'exceeding expectations' is required.
3. Has attendance at this conference been identified within the staff member's PDR/Professional Development Planning for the coming year?

**Additional Guidelines:**

1. As a general rule, only one staff member from an Operations Division or department should attend the same conference.
2. Attendance at a conference (unless speaking or presenting) should be limited to once annually.
3. Prior to conference attendance, the manager and staff member attending should agree to a set of expectations (these might include the following):
  - An agreed set of learning outcomes/reasons for attendance.
  - Any specific connections/relationships/information/compliance or regulatory elements that are to be sought.
4. Post-conference, the staff member who attended will lead a structured 'teach- back' session with their team to share the learning from the conference. Explore and encourage wider opportunities to share this learning in the Operations Group.

**Related Policies, Procedures and Forms**

- Operations Guidelines for Conference Attendance
- Operations Division International Travel Policy
- University Travel and Travel Related Costs Policy  
<http://www.otago.ac.nz/administration/policies/otago025562.html>

**Contact for further information about this Policy**

If you have any queries regarding the content of this policy or need further clarification, contact the Chief Operating Officer at [coo@otago.ac.nz](mailto:coo@otago.ac.nz)

**Implementation Process**

<b>Person responsible</b>	Managers and Directors of each Division.
<b>Communication strategy</b>	Policy to be sent to Directors and Senior Management Teams of Divisions within Operations. Managers to disseminate the policy to their departments.