



OTAGO POLYTECHNIC MANAGEMENT POLICY		Number: MP0454.11
Title:	Discount on internal programmes/courses	
Classification:	Operations	
Chief Executive Approval:	Effective Date: 1 December 2018	Review Date: 1 November 2021
Previous Policy No:	n/a	Status: Current
Contact Authority:	Deputy Chief Executive: People, Performance and Development	

Purpose

To provide guidelines and procedures for full time and proportional Otago Polytechnic staff, their partners, their dependants, Otago Polytechnic Council members and Alumni wishing to receive a discount for student tuition fees for courses/programmes at Otago Polytechnic that are funded by the TEC Student Achievement Component (SAC) fund.

For non TEC SAC funded courses, e.g. OTCONT self-funded courses/programmes, such as, night classes, short courses, (with the exception of Alumni applicants), EventBrite and EduBits, please refer to clause 6.1.

Policy

1. Subject to the conditions listed throughout this policy, qualifying Otago Polytechnic staff members (refer clause 3) their partners and dependants, current Otago Polytechnic Council members and registered Alumni are entitled to a discount of Otago Polytechnic tuition fees in accordance with the Discount Schedule (Appendix 1).
 - 1.1. For staff, and their partners and dependents, the discount rate is related to FTE status up to 100%.
2. The Chief Executive may, at the request of the school/academic area, exempt any programme/course from this policy or adjust the rate of discount outlined in the Staff Discount Schedule.
3. A qualifying Otago Polytechnic staff member is any permanent staff member and any staff member employed on a fixed term contract of one year or more (not casual). Staff member also includes Otago Polytechnic contractor, employee of Otago Polytechnic Auckland International Campus (OPAIC) Limited Partnership, employee of Moana House, or an Otago Polytechnic student employed while studying, who are delivering core Otago Polytechnic business with an FTE status of 0.4FTE or above.
 - 3.1. Other staff members with less than 0.4FTE (i.e. part time, casual, temp on campus) may qualify for discount if they are required to undertake role specific education/training with approval from the Director: People and Culture.
4. If a staff member has accessed funding for staff development or a staff discount and has subsequently resigned from employment with Otago Polytechnic, any such funding or discount will cease at the end of the current enrolment. Special circumstances are to be referred to the Director: People and Culture.
5. The costs of this policy are a corporate overhead with discounted fees charged to 101-90133-128.
6. **Conditions – for all types of discount**
 - 6.1. Discount only applies to TEC Student Achievement Component (SAC) funded programmes/courses. **There is no discount for OTCONT self-funded courses/programmes (except for Alumni applicants) such as Art night classes, Design short courses, Hospitality short courses, Engineering short courses, EventBrite and EduBits courses unless:**
 - 6.1.1. it is specified as mandatory or priority in the staff member's IPP, or
 - 6.1.2. specifically negotiated with the Formal Leader with consultation by the Director People and Culture - this reason must be noted on the Staff



discount form (Appendix 2), or

- 6.1.3. Application made by registered Alumni member (refer to clause 9).
- 6.2. Discount applies only to the tuition portion of the learner fees, and excludes components such as OPSA and NZQA fees.
- 6.3. Where the delivery fee includes significant resource costs (text books for example), these will be excluded from the discounted portion.
- 6.4. Discounts cannot be applied for retrospectively.
- 6.5. A new discount/enrolment form must be completed every year for all types of discounted enrolment.

7. Staff Discount

- 7.1. Otago Polytechnic **compulsory training courses such as Treaty of Waitangi workshop for all staff and Graduate Diploma in Tertiary Education (GDTE) do not require a discount form – instead the process will be directed by People and Culture.**
- 7.2. All mandatory/priority staff development activities must be in the approved Individual Performance Plan (IPP). Individual Performance Plan criteria and priorities are detailed in policy *MP0461 Staff Development* and should be referred to in relation to this discount policy.
- 7.3. **For all other course/programme discount requests** the staff member requesting the discount and the staff member's Formal Leader will complete the Staff Discount/Enrolment form in Appendix 2 and forward to People and Culture for verification of employment FTE status
 - 7.3.1. It is expected that the staff member has discussed their enrolment intentions with the Formal Leader prior to enrolment, and provided access to an online Performance Portal copy of their IPP to their Formal Leader for approval before completing the discount form in Appendix 2.
 - 7.3.2. Once People and Culture have verified the FTE status the form is then submitted to Registry for processing. The application will then be processed normally, entry requirements checked, and notification of acceptance/decline.
- 7.4. Wherever possible staff will be accepted without being waitlisted for courses that are identified in their IPP.

8. Discounts for Partners, Dependants¹ and OP Council Members

- 8.1. Discounts are available to partners, dependants and Council members as per Appendix 1, and subject to the conditions noted in clauses 6.1 - 6.6.
- 8.2. Priority entry to programmes will be given to partners and dependants of staff members who meet entry and selection criteria.
- 8.3. For a staff member's partner/dependants, the discount form must be signed by the staff member and verified by People and Culture.
- 8.4. **For an OP Council member the discount form** must be signed by the OP Council member and verified by People and Culture.
- 8.5. Acceptance into a multi-year programme on a discount basis does not automatically mean the discount will apply for the duration of the programme. A new discount form is required every year (refer to clause 6.6).
- 8.6. If a staff member having accessed partner/dependent discount ceases

¹ Dependant is a child or stepchild of a staff member, including those for whom a legal arrangement such as adoption or guardianship is held. It does not include children's partners or their children.



employment, or a council member's term finishes, the discounted fees cease at the end of the current enrolment. Any further enrolments will have the relevant full fees charged to the individual.

8.6.1. Special circumstances are to be referred to the Director: People and Culture.

9. Discount for Alumni

9.1. Registered Alumni have access to discounted courses/programmes as follows:

9.1.1. Individual courses (not full programmes unless clause 9.2 applies) are free if they are in the same or equivalent qualification to the one previously awarded.

9.1.2. For other courses there is a 15% discount.

9.2. When a registered alumni enrolls in another full qualification programme 2 years or more after completing the previous qualification, a 15% discount applies to the tuition fees only,

9.3. Evidence of Alumni Registration is verified in the Student Management System by a Registry team member at time of application/enrolment. **No discount form is required.**

Note 1: Alumni cannot accumulate free courses to get a new qualification. A maximum of 2 free courses can be credited to a new qualification.

Note 2: Learner levies and ID card are not included.

10. Failure to complete a course

10.1. Where the recipient of any payment identified in this policy fails or fails to complete a course or courses for which payments have been made by Otago Polytechnic, future payments will not be provided for repeat study, nor for alternative study, until a successful track record is re-established.

10.1.1. The Polytechnic will reimburse fees which would otherwise have been paid by the Polytechnic on application following successful completion.

10.1.2. In exceptional circumstances the Formal Leader may waive this requirement. This provision applies to all recipients of staff discounts.

Please note: Staff who are undertaking study as part of the development priorities set out in policy MP0461 Staff Development, who do not successfully complete their commitments, and where no extenuating circumstances are accepted, will not be eligible for any staff development funding until a successful track record is re-established.

Referral Documents

Appendix 1: Discount schedule
Appendix 2: Discount form
Appendix 3: Flowchart of process

MP0354 Learner Fees
MP0443 Surplus Staffing
MP0461 Staff Development

Approved by Chief Executive
Date: 1 December 2018



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MP0454 Discount for internal courses, programmes

DISCOUNT SCHEDULE

- Discount rate for Otago Polytechnic compulsory training, e.g. Treaty of Waitangi Workshops, Graduate Diploma in Tertiary Education (GDTE) for academic staff is 100% - no discount form is required.
- Discount rate for activity identified in Individual Performance Plan (IPP) as mandatory and/or priority activity is 100% regardless of FTE.
- Discount rates for activity identified in Individual Performance Plan (IPP) that are not mandatory or priority are related to FTE status up to 100%.
- Discount for Partners, Dependants are related to staff member's FTE status.

Staff Member Proportion	Discount for Staff Member		Discount for Partner or Dependant
	Mandatory / Priority	Non priority	
0.6-1.00 FTE	100%	100%	50%
0.4-0.59 FTE	100%	60%	30%

- A staff member with a proportion less than 0.4FTE (i.e. part time, casual, temps) may qualify for staff discount if they are required to undertake role specific education/training with approval from the Director: People and Culture,

Council Member Discount
50% discount for first enrolment in a programme and subsequently following successful completion of prior courses studied, for which discount has been given.

Registered Alumni Discount
3 scenarios
Free courses (not full programmes) if in same qualification area completed
15% discount other courses
15% discount for full qualification programme 2 years or more following graduation

The level of fees is set as per this schedule and can only be adjusted by the Chief Executive.



MP0454 Discount Form (application for discounted programme/course fees)

All information on this form should be completed and sent to People and Culture for employment verification who will then forward it to Registry for processing.

Note 1: No discount form is required for OP compulsory courses such as Treaty of Waitangi for all staff or Graduate Diploma in Tertiary Education (GDTE) for Academic staff.

Note 2: Discount for OTCONT short courses is only available if mandatory or priority in IPP, or if negotiated with Formal Leader and Director People and Culture.

**SECTION A: APPLICANT TO COMPLETE****1. Request for discount:**

Your name: _____

Learner ID: _____

Role and proportion: _____

Work area: _____ OR Member of OP Council **2. Programme/course details:**

Name of programme/course: _____

Delivering school: _____

3. Type of discount: Activity identified as mandatory or priority in IPP Non-priority activity identified in IPP

If activity is OTCONT self-funded course, negotiated with Formal Leader and Director People and Culture, then please provide reason

 Otago Polytechnic Council Members discount Staff partners and dependants discount

Partner/Dependent name: _____

Learner ID: _____

Their relationship to you: _____

4. Signature of Staff Member or Council Member _____ **Date:** _____**5. Name and signature of Formal Leader :** _____ **Date:** _____

Applicant to now forward completed form to People and Culture

SECTION B: PEOPLE AND CULTURE TO COMPLETE

Verification of Staff Member's employment - FTE and % discount to be applied:

Staff Member Proportion	Discount for Staff Member		Discount for Partner or Dependant
	Mandatory / Priority	Non priority	
0.6-1.00 FTE <input type="checkbox"/>	100% <input type="checkbox"/>	100% <input type="checkbox"/>	50% <input type="checkbox"/>
0.4*-0.59 FTE <input type="checkbox"/>	100% <input type="checkbox"/>	60% <input type="checkbox"/>	30% <input type="checkbox"/>

*a staff member employed on less than 0.4FTE may qualify for staff discount if they are required to undertake role specific education/training with approval from the Director: People and Culture

People and Culture Name and Signature: _____ Date: _____

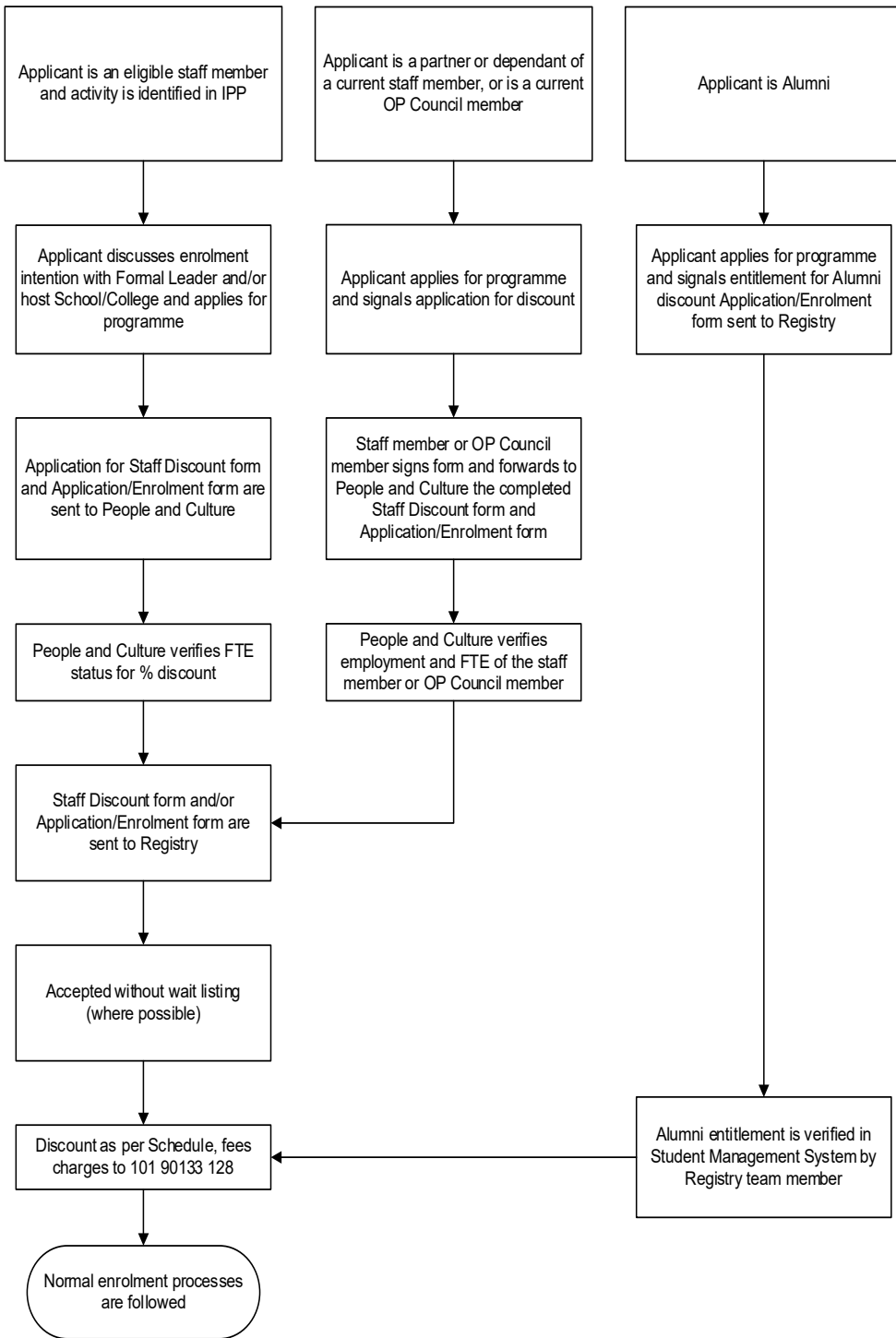
Account code to charge: 101 – 90133 – 128

People and Culture forward completed form to Registry



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Activity is compulsory OP requirement,
 e.g. Treaty of Waitangi workshop for all staff
 and Graduate Diploma in tertiary Education
 (GDTE) for academic staff, no discount form
 required - process will be directed by People
 and Culture



NB All courses/programmes, whether a priority or not, need to be identified in IPP.
 All applicants to courses/programmes accessing funding support via this policy have priority entry (if entry criteria met).