

# UTS Disclosure Log Entry – GIPA2026/04

Provided under s.25 of the NSW Government Information (Public Access) Act 2009.

## Date decided:

25 March 2026

## Scope of request:

Procurement activity between UTS and Beyond Excellence, including:

- quotes,
- tenders,
- approval of exemptions to quotes and/or tender (whichever apply),
- contracts/agreements,
- invoices,
- travel bookings for Beyond Excellence staff
- travel and expense reports Beyond Excellence staff

Date Range: 1 January 2022 to 11 February 2026 (date application received).

## PROCUREMENT EXEMPTION APPROVAL \$10K TO \$250K

The purpose of this documents is to seek approval to: undertake a reduced number of quotations, enter into Direct Negotiations, or a Single Source procurement process; and to engage a supplier in order to procure goods/services/capital equipment. This form must be completed and approved prior the supplier being notified of the award and before committing to an agreement. All forms once completed and approved must be sent to [procurement@uts.edu.au](mailto:procurement@uts.edu.au)  
\*It is the responsibility of the requestor to ensure the availability of funds (budget) exists, and prior-approval to commit those funds is secured via delegated authority.

<b>Supplier Name/Service Description</b>	Julie Birtles – Beyond Excellence	
<b>Projected spend / Volume(s):</b>	s14, c14(c)	
<b>Period to be covered:</b>	2022	
<b>Faculty/Business/Department affected:</b>	People Unit	
<b>Responsible Manager</b>	Jennifer Lagoon	
<b>Trim Reference</b>	TBC	
<b>Commercial Justification and recommendation for purchase:</b>	Julie Birtles, Founder of Beyond Excellence is an Executive Leadership Coach with an impressive reputation working with very senior leaders in a variety of settings, including the university sector. Julie has previously worked with the s14, c13(a)(b) and supported the s14, c13(a)(b). This engagement represents an extension of this support, thus it is appropriate to continue with Julie. Julie will be engaged for a further 6 month program (this is not limited by a number of hours) of Executive Coaching. Considering other leadership coaches for this engagement is not recommended as the most important component of the coaching relationship is trust between the coach and the coachee, which takes time to establish	
<b>A Single Source, or Direct Negotiation ('flow-on' work) is required because:</b>		
Yes	No	There are no alternative suppliers for this purchase; and there are no comparable or alternate products which could provide a similar outcome;
Yes	No	Replacement or continuing supply of goods/services is required from this supplier for compatibility to an original supply, or to meet a manufacturer specification/warranty;
Yes	No	Insufficient time has been made available to complete this process in accordance with the UTS Procurement Policy; and a DVC has authorized this exemption to Procurement Policy [as detailed in the attached memo/email]
Yes	No	This purchase is in accordance with the Terms & Conditions of the Grant Funding Agreement, and the proposed supplier is named in the PRO / Project Number [insert]
<b>I am unable to obtain the mandatory number of quotations in accordance with UTS Policy and Procedures because:</b>		
Yes	No	There are insufficient suppliers in the market in order to obtain the mandatory number of quotations monopoly / oligopoly
Yes	No	Insufficient time has been made available to complete this process in accordance with the UTS Procurement Policy; and a DVC has authorized this exemption to Procurement Policy [as detailed in the attached memo/email]
<b>Supplier Quotes/Pricing Summary:</b>		
Julie Birtles, Beyond Excellence s14, c14(c)(d)	[.Insert supplier name.]	[.Insert supplier name.]



[.Insert supplier name.]	[.Insert supplier name.]	[.Insert supplier name.]
[.Insert supplier name.]	[.Insert supplier name.]	[.Insert supplier name.]

**DECLARATION OF APPROVER(S):**

- I **Jennifer Lagoon** understand my obligations under the [UTS Code of Conduct](#) in relation to any [Conflict of Interest](#), and hereby declare I do not have any professional, personal or family allegiance, bias, inclination, obligation or loyalty which may affect my objectivity, independence or impartiality in approving this procurement. I do not have any personal financial interest in the goods/services being provided, nor to the best of my knowledge do any of my relatives or friends. Further, I warrant that I have not and will not discuss or share any information about this project with persons outside of the official Project Team, other than where such information is already publicly available; and

- I **Jennifer Lagoon** confirm I am confident this exemption will yield the best value outcome for UTS. I have verified that:

Yes	No	There are no alternative suppliers for this purchase, and there are no comparable or alternate products which could provide a similar outcome;
Yes	No	There are insufficient suppliers in the market in order to obtain the mandatory number of quotations monopoly / oligopoly
Yes	No	Replacement or continuing supply of goods/services is required from this supplier for compatibility to an original supply, or to meet a manufacturer specification/warranty;
Yes	No	Insufficient time has been made available to complete this process in accordance with the UTS Procurement Policy; and a DVC has authorized this exemption to Procurement Policy <a href="#">[as detailed in the attached memo/email]</a>
Yes	No	This purchase is in accordance with the Terms & Conditions of the Grant Funding Agreement, and the proposed supplier is named in the PRO / Project Number <a href="#">[insert]</a>

Approver Name: <b>Jennifer Lagoon</b>	Approver Name: .....	Approver Name: .....
Date: <b>21/12/2021</b>	Date: .....	Date: .....
Title/Department: <b>Director, People</b>	Title/Department: .....	Title/Department: .....
Signature:	Signature: .....	Signature: .....

s14, c13(a)(b)

Document endorsed by CFO FSU: ..... Date: .....

**\*ALL FORMS MUST BE COMPLETED AND SENT TO [procurement@uts.edu.au](mailto:procurement@uts.edu.au) PRIOR TO UNDERTAKING YOUR PURCHASE**

Approval

**A Procurement Process exemption below \$250k is:**

- Where the prerequisite number of quotes cannot/or will not be obtained and exemption is required.

**The following steps are still required:**

- Declaration of Conflict of Interest/Confidentiality
- Commercial justification and recommendation for purchase
- Approval for award
- Notification to any unsuccessful suppliers
- Record all documents and meetings
- Contracts over \$150k Inc. GST are subject to [GIPA](#)

**A Exemption to Process is approved by:**

**Specialist Research Capital Equipment:**

- \$10k to \$50k DOA
- \$50k - \$100k Deans/Directors (Band 3+),
- \$100k - \$250k The Provost

**CAPEX / IT CAPEX:**

- \$10k to \$50k DOA
- \$50k to \$100k Deans/Directors (Band 3+),
- \$100k to \$250k CIO (IT), or Director PMO/FMO

**Goods & Services:**

- \$10k to \$50k DOA
- \$50k - \$100k Deans/Directors (Band 3+), or Strategic Procurement
- \$100k - \$250k Strategic Procurement

# TAX INVOICE

Jennifer Lagoon  
Director, Human Resources  
University of Technology Sydney  
Level 23, Building 115 Broadway  
ULTIMO NSW 2007

**Invoice Date**  
23 Dec 2021

**Invoice Number**  
INV-1330

**ABN**  
18 790 253 181

Beyond Excellence Pty Ltd  
Attention: Julie Birtles  
Level 3  
50 Market Street  
MELBOURNE VIC 3000  
AUSTRALIA

Description	Quantity	Unit Price	GST	Amount AUD
Professional Services: Six-month Executive Coaching with s14, c13(a)(b)	1.00	s14, c14(c)(d)	10%	s14, c14(c)(d)
			Subtotal	
			TOTAL GST 10%	
			<b>TOTAL AUD</b>	

## Due Date: 20 Jan 2022

Banking Details:

Beyond Excellence

BSB: s14, c14(c)(d) Account No: s14, c14(c)(d)

If payment is made outside Australia

Swift Code: WPACAU2S

PLEASE QUOTE INVOICE NUMBER IN DESCRIPTION WHEN MAKING PAYMENTS

# PAYMENT ADVICE

To: Beyond Excellence Pty Ltd  
Attention: Julie Birtles  
Level 3  
50 Market Street  
MELBOURNE VIC 3000  
AUSTRALIA

**Customer** Jennifer Lagoon  
**Invoice Number** INV-1330  
**Amount Due** s14, c14(c)(d)  
**Due Date** 20 Jan 2022

**Amount Enclosed**

Enter the amount you are paying above

## Schedule A to the Master Contractor Agreement

### Details

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**Item 1: Date of Master Contractor Agreement**

18-Mar-15

**Item 2: Contractor Details**

Contractor Name and Title: Julie Birtles

Company Name: Beyond Excellence Pty Ltd

ABN: 18 790 253 181

Address: Level 40, 140 William Street, Melbourne Vic 3000

Email: juliebirtles@beyondexcellence.com.au

Contact number: T: +61 3 9607 8445

M: +61 417 562 322

**Item 3: UTS Details**

Contact Name and Title: Jennifer Lacoon

Faculty/Unit/Institution: Director, People Unit

Address: University of Technology Sydney

PO BOX 123 ULTIMO NSW 2053

Contact

Email: Jennifer.Lagoon@uts.edu.au  
Phone: 9514 4679

Alt Contact: Belinda Robinson

Email: Belinda.Robinson@uts.edu.au

Phone: 9514 4395

**Item 4: Services**

The Contractor will provide the following services and/or deliverables:

	<b>Service/deliverables</b>	<b>Date</b>	<b>Duration</b>
(a)	Negotiation of goals and outcomes for executive coaching in <span style="background-color: #cccccc;">s14, cl3(a)(b)</span>	<b>From</b> December 2021	<b>To</b> December 2022
(b)	Six (6) six-month coaching engagement. Coaching is not limited to a set number of hours. In essence, the coach will match their energy with the coachee.  The impact of the coaching will be reviewed upon it's conclusion and an option to exten to 12mths will be considered depending on priorities at the time.	<b>From</b> December 2021	<b>To</b> December 2022
(d)	Reporting mid and end cycle	<b>As agreed</b>	
(e)	Project management and administration	<b>As agreed</b>	

**Item 5: Commencement and Completion Dates**

**Estimated Commencement Date:** December 2021

**Estimated Completion Date:** December 2022

**Item 6: Services Fees and Reimbursable Expenses**

**(a) Services Fees**

The services fees for this six (6) month engagement is total s14, cl4(c)(d) (excluding GST) s14, cl4(c)(d)

s14, cl4(c)(d) .

Each invoice must set out the amount of Services Fees plus any applicable GST. This is invoiced in full upon acceptance of this proposal.

**(b) Reimbursable Expenses**

UTS will not reimburse the Contractor's reasonable out of pocket expenses.

**Item 7 Insurance**

- (a) **Public liability insurance:** with a limit of indemnity of not less than \$[5] million dollars. Such insurance must be maintained from the Commencement Date until the Contractor ceases to provide the Services.
- (b) **Professional indemnity insurance:** with a limit of indemnity of not less than \$[1] million dollars and a deductible of not more than \$[20] thousand dollars. Such insurance must be maintained from the Commencement Date until 7 years after the date the Contractor ceases to provide the Services
- (c) workers compensation insurance in accordance with the *Workers Compensation Act 1987* (NSW) and the *Workplace Injury Management and Workers Compensation Act 1998* (NSW). **Item 8**

**Termination notice**

Notice required by UTS: [30] days.

Item 9 UTS Website – location of policies and other instruments **Policies and other instruments:** <http://www.gsu.uts.edu.au/policies>.

**Health and safety responsibilities:** <http://www.safetyandwellbeing.uts.edu.au/responsibilities/index.html>.

## Schedule B to the Master Contractor Agreement - Subcontractor's Statement Regarding Worker's Compensation, Payroll Tax and Remuneration – to be completed on submission of invoice if applicable.

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For the purposes of this Statement a "subcontractor" is a person (or other legal entity) that has entered into a contract with a "principal contractor" to carry out work. **(Note1 – See End of Form)**

This Statement must be signed by a "subcontractor" (or by a person who is authorised, or held out as being authorised, to sign the statement by the subcontractor) referred to in any of s175B *Workers Compensation Act* 1987, Schedule 2 Part 5 *Payroll Tax Act* 2007, and s127 *Industrial Relations Act* 1996 where the "subcontractor" has employed or engaged workers or subcontractors during the period of the contract to which the form applies under the relevant Act(s). The signed Statement is to be submitted to the relevant principal contractor.

### SUBCONTRACTOR'S STATEMENT (Refer to the back of this form for Notes, period of Statement retention, and Offences under various Acts.

Subcontractor: ..... ABN: .....  
(Business name)

of .....  
(Address of subcontractor)

has entered into a contract with the University of Technology, Sydney ABN: 77 257 686 961  
(Business name of principal contractor) **(Note 2)**

Contract number/identifier: N/A **(Note 3)**

This Statement applies for work between: ...../...../..... and ...../...../..... inclusive, **(Note 4)**

subject of the payment claim dated: ..... /...../..... **(Note 5)**

I, ..... a Director or a person authorised by the Subcontractor on whose behalf this declaration is made, hereby declare that I am in a position to know the truth of the matters which are contained in this Subcontractor's Statement and declare the following to the best of my knowledge and belief:

**(a)** The abovementioned Subcontractor has either employed or engaged workers or subcontractors during the above period of this contract. Tick [ ] if true and comply with **(b)** to **(g)** below, as applicable. If it is not the case that workers or subcontractors are involved or you are an exempt employer for workers compensation purposes tick [ ] and only complete **(f)** and **(g)** below. You must tick one box. **(Note 6)**

**(b)** All workers compensation insurance premiums payable by the Subcontractor in respect of the work done under the contract have been paid. The Certificate of Currency for that insurance is attached and is dated ...../...../..... **(Note 7)**

- (c) All remuneration payable to relevant employees for work under the contract for the above period has been paid. **(Note 8)**
- (d) Where the Subcontractor is required to be registered as an employer under the Payroll Tax Act 2007, the Subcontractor has paid all payroll tax due in respect of employees who performed work under the contract, as required at the date of this Subcontractor's Statement. **(Note 9)**
- (e) Where the Subcontractor is also a principal contractor in connection with the work, the Subcontractor has in its capacity of principal contractor been given a written Subcontractor's Statement by its subcontractor(s) in connection with that work for the period stated above. **(Note 10)**
- (f) Signature ..... Full name.....
- (g) Position/Title ..... Date ..... /...../.....

**NOTE:** Where required above, this Statement must be accompanied by the relevant Certificate of Currency to comply with section 175B of the Workers Compensation Act 1987.

**Notes**

1. This form is prepared for the purpose of section 175B of the Workers Compensation Act 1987, Schedule 2 Part 5 Payroll Tax Act 2007 and section 127 of the Industrial Relation Act 1996. If this form is completed in accordance with these provisions, a principal contractor is relieved of liability for workers compensation premiums, payroll tax and remuneration payable by the subcontractor.

A principal contractor can be generally defined to include any person who has entered into a contract for the carrying out of work by another person (or other legal entity called **the subcontractor**) and where employees of the subcontractor are engaged in carrying out the work which is in connection with the principal contractor's business.

2. For the purpose of this Subcontractor's Statement, a principal contractor is a person (or other legal entity), who has entered into a contract with another person (or other legal entity) referred to as the subcontractor, and employees/workers of that subcontractor will perform the work under contract. The work must be connected to the business undertaking of the principal contractor.
3. Provide the unique contract number, title, or other information that identifies the contract.
4. In order to meet the requirements of s127 Industrial Relations Act 1996, a statement in relation to remuneration must state the period to which the statement relates. For sequential Statements ensure that the dates provide continuous coverage.

Section 127(6) of the Industrial Relations Act 1996 defines remuneration 'as remuneration or other amounts payable to relevant employees by legislation, or under an industrial instrument, in connection with work done by the employees.'

Section 127(11) of the Industrial Relations Act 1996 states 'to avoid doubt, this section extends to a principal contractor who is the owner or occupier of a building for the carrying out of work in connection with the building so long as the building is owned or occupied by the principal contractor in connection with a business undertaking of the principal contractor.'

5. Provide the date of the most recent payment claim.
6. For Workers Compensation purposes an exempt employer is an employer who pays less than \$7500 annually, who does not employ an apprentice or trainee and is not a member of a group.
7. In completing the Subcontractor's Statement, a subcontractor declares that workers compensation insurance premiums payable up to and including the date(s) on the Statement have been paid, and all premiums owing during the term of the contract will be paid.
8. In completing the Subcontractor's Statement, a subcontractor declares that all remuneration payable to relevant employees for work under the contract has been paid.
9. In completing the Subcontractor's Statement, a subcontractor declares that all payroll tax payable relating to the work undertaken has been paid.
10. It is important to note that a business could be both a subcontractor and a principal contractor, if a business 'in turn' engages subcontractors to carry out the work. If your business engages a subcontractor you are to also obtain Subcontractor's Statements from your subcontractors.

#### **Statement Retention**

The principal contractor receiving a Subcontractor's Statement must keep a copy of the Statement for the periods stated in the respective legislation. This is currently up to seven years.

#### **Offences in respect of a false Statement**

In terms of s127(8) of the Industrial Relations Act 1996, a person who gives the principal contractor a written statement knowing it to be false is guilty of an offence if:

- (a) the person is the subcontractor;
- (b) the person is authorised by the subcontractor to give the statement on behalf of the subcontractor; or
- (c) the person holds out or represents that the person is authorised by the subcontractor to give the statement on behalf of the subcontractor.

In terms of s175B of the Workers Compensation Act and clause 18 of Schedule 2 of the Payroll Tax Act 2007 a person who gives the principal contractor a written statement knowing it to be false is guilty of an offence.

#### **Further Information**

For more information, visit the WorkCover website [www.workcover.nsw.gov.au](http://www.workcover.nsw.gov.au), Office of State Revenue website [www.osr.nsw.gov.au](http://www.osr.nsw.gov.au), or Office of Industrial Relations website, Department of Commerce website [www.commerce.nsw.gov.au](http://www.commerce.nsw.gov.au). Copies of the Workers Compensation Act 1987, the Payroll Tax Act 2007 and the Industrial Relations Act 1996 can be found at [www.legislation.nsw.gov.au](http://www.legislation.nsw.gov.au)

#### **Execution page**

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Executed as an agreement

**SIGNED** by **UNIVERSITY OF TECHNOLOGY SYDNEY (ABN 77 257 686 961)** by its authorised representative in the presence of:

s14, cl3(a)(b)

\_\_\_\_\_  
Signature of Authorised Representative

JENNIFER LACOON

\_\_\_\_\_  
Full Name of Authorised Representative

22/12/2021

\_\_\_\_\_  
Date

s14, cl3(a)(b)

\_\_\_\_\_  
Signature of Witness

FATIMA VILLAVERT

\_\_\_\_\_  
Full Name of Witness

**SIGNED** by Beyond Excellence Pty Ltd (18 790 253 181) by two Directors or a Director and a Secretary in accordance with section 127 of the Corporations Act 2001 (Cth):

s14, cl3(a)(b)

\_\_\_\_\_  
Signature of Director

Julie Birtles

\_\_\_\_\_  
Full Name of Director

4/04/2022

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Director/Secretary

\_\_\_\_\_  
Full Name of Director/Secretary

**be** / bi: / *v. & v.aux.* (*sing. present* **am** / æm, əm /; **are** / a:, ə /; **is** / ɪz /; *pl. present* **are**; *1st and 3rd sing. past* **was** / wɒz, wez /; *2nd sing. past and pl. past* **were** / wɜ:, we /; *present subj.* **be**; *past subj.* **were**; *pres. part.* **being**; *past part.* **been** / bi:n /) • *v.intr.* **1** (often prec. by *there*)

**BE**yondExcellence Level 3, 50 Market Street, Melbourne Vic 3000. Telephone: +61 417 562 322

30<sup>th</sup> May 2022

Professor Andrew Parfitt  
Vice-Chancellor & President  
University of Technology Sydney  
15 Broadway  
Ultimo NSW 2007

Dear Andrew

Thank you for the opportunity to provide a proposal to work with **s14, cl3(a)(b)** to support **s14, cl3(a)** transition from UTS. Following is an outline of my approach along with professional fees and business terms.

### Executive Transition

In my experience, far too many executive transitions fail to realise their potential. While this is generally remarkably disappointing for the individual, it is also unnecessary.

To address this, I have created a robust transition process that has successfully supported many senior executives to create rewarding futures. This has resulted in new executive roles, high profile Directorships and the creation of businesses including consultancies, joint ventures and partnerships.

This is achieved through a comprehensive approach that is designed to transform the way **s14, cl3(a)** thinks, which will catalyse deep change – change that identifies and realises **s14, cl3(a)** underlying potential.

The success of this lies in:

- The design of a Transition Plan that incorporates **s14, cl3(a)** personal and professional needs to guide **s14, cl3(a)** activities and decision-making over the coming months.
- Developing a deeper sense of self, which will build **s14, cl3(a)** confidence and refine how others experience **s14, cl3(a)** leadership presence and impact.



## **Appendix**

### **Executive Profile - Julie Birtles**

For over 20 years Julie has worked at the pioneering edge of leadership, complexity and disruption. This has been highly successful in shaping a new generation of leaders who have the skill and confidence to navigate increasing complexity, uncertainty and large-scale change.

Clients engage Julie and her team to work on strategic, high-value and sensitive engagements to improve individual and collective performance in intensely competitive and demanding environments. This ranges from conducting confidential industry, organisational and stakeholder reviews through to designing change programs, facilitating executive leadership and team development forums, mentoring high potential and successful leaders and developing many of the industry's coaches and mentors.

Julie's clients span the private, public and non-profit sectors and include top 20 ASX-listed companies, global subsidiaries, professional service firms, universities, entrepreneurs and government departments and agencies.

An accomplished business leader in her own right, Julie has helped initiate and shape groundbreaking industry transformation, employment transition and economic stimulus initiatives. She co-developed Australia's first leadership program for federal parliamentarians, which was later extended to include programs for Federal and State members.

As well as extensive business experience and a Masters degree in Entrepreneurship and Innovation, Julie is currently researching the factors that shape high-impact leadership through a Masters in Sustainability Leadership at Cambridge University. Additionally, Julie runs public leadership programs and works with visionaries around the world to strengthen the ranks of leaders with the skill and confidence to catalyse large-scale innovation and change.

# TAX INVOICE

Professor Andrew Parfitt  
Vice-Chancellor & President  
University of Technology Sydney  
Building 1  
15 Broadway  
ULTIMO NSW 2000

**Invoice Date**  
31 May 2022

**Invoice Number**  
INV-1402

**ABN**  
18 790 253 181

Beyond Excellence Pty Ltd  
Attention: Julie Birtles  
Level 3  
50 Market Street  
MELBOURNE VIC 3000  
AUSTRALIA

Description	Quantity	Unit Price	GST	Amount AUD
Consulting services including feedback interviews and development of leadership initiatives	1.00	s14, c14(c)(d)	10%	s14, c14(c)(d)
			Subtotal	
			TOTAL GST 10%	
			<b>TOTAL AUD</b>	

## Due Date: 28 Jun 2022

Banking Details:

Beyond Excellence

BSB: s14, c14(c)(d) Account No: s14, c14(c)(d)

If payment is made outside Australia

Swift Code: WPACAU2S

PLEASE QUOTE INVOICE NUMBER IN DESCRIPTION WHEN MAKING PAYMENTS

# PAYMENT ADVICE

To: Beyond Excellence Pty Ltd  
Attention: Julie Birtles  
Level 3  
50 Market Street  
MELBOURNE VIC 3000  
AUSTRALIA

**Customer** Professor Andrew Parfitt  
**Invoice Number** INV-1402  
**Amount Due** s14, c14(c)(d)  
**Due Date** 28 Jun 2022

**Amount Enclosed**

Enter the amount you are paying above

# TAX INVOICE

Professor Andrew Parfitt  
Vice-Chancellor & President  
University of Technology Sydney  
Building 1  
15 Broadway  
ULTIMO NSW 2000

**Invoice Date**  
31 May 2022

**Invoice Number**  
INV-1336

**ABN**  
18 790 253 181

Beyond Excellence Pty Ltd  
Attention: Julie Birtles  
Level 3  
50 Market Street  
MELBOURNE VIC 3000  
AUSTRALIA

Description	Quantity	Unit Price	GST	Amount AUD
Executive Transition support for s14, c13(a)(b)	1.00	s14, c14(c)(d)	10%	s14, c14(c)(d)
			Subtotal	
			TOTAL GST 10%	
			<b>TOTAL AUD</b>	

## Due Date: 14 Jun 2022

### Banking Details:

Beyond Excellence

BSB: s14, c14(c)(d) Account No: s14, c14(c)(d)

If payment is made outside Australia

Swift Code: WPACAU2S

PLEASE QUOTE INVOICE NUMBER IN DESCRIPTION WHEN MAKING PAYMENTS

# PAYMENT ADVICE

To: Beyond Excellence Pty Ltd  
Attention: Julie Birtles  
Level 3  
50 Market Street  
MELBOURNE VIC 3000  
AUSTRALIA

**Customer** Professor Andrew Parfitt

**Invoice Number** INV-1336

**Amount Due** s14, c14(c)(d)

**Due Date** 14 Jun 2022

**Amount Enclosed**

Enter the amount you are paying above

**be** / bi:/ *v. & v.aux.* (*sing. present* **am** / æm, əm /; **are** / a:, ə /; **is** / ɪz /; *pl. present* **are**; *1st and 3rd sing. past* **was** / wɒz, weɪz /; *2nd sing. past and pl. past* **were** / wɜ:, we /; *present subj.* **be**; *past subj.* **were**; *pres. part.* **being**; *past part.* **been** / bi:n /) • *v.intr.* **1** (often prec. by *there*)

**BE**yondExcellence

Level 3, 50 Market Street, Melbourne Vic 3000. Telephone: +61 417 562 322

6 June 2022

Professor Andrew Parfitt  
Vice-Chancellor & President  
University of Technology Sydney  
City Campus  
Building 1  
15 Broadway NSW 2007

Dear Andrew,

Thank you for the opportunity to provide a proposal to conduct feedback interviews with the University Leadership Team (ULT) and key stakeholders. The following outlines the process and associated fees.

### Strategic Context

Appointed Vice-Chancellor in November 2021, you assumed the leadership of UTS at a time when continuing uncertainty and disruption were impacting the higher education sector. This spans the transition to hybrid working and learning, intense competition for students, talent and industry partnerships and natural disasters, geopolitical forces and a global pandemic to name a few. Remaining vital in a changing world requires adaptive and distributed leadership and the ability to evolve UTS to realise its vision as a world-leading University of Technology.

As Vice-Chancellor, you have made changes to the leadership structure and composition of the ULT, are overseeing key strategic appointments and leading a team of diverse experience, tenures and specialisations. The ULT is operating in a dynamic and complex environment and key staff changes, such as **s14, cl3(a)(b)**, leaving, amplify the loss of institutional knowledge while the addition of new colleagues in academic and professional roles will bring energy, experience and perspective to the ULT.

Key success factors lie in your ability to lead a senior team through transition and for the ULT to work together to overcome historical differences, embrace new colleagues and collectively build the trust, alignment and performance required to see UTS thrive. The balance here centres on optimising individual performance with collective impact.

Focusing on team development will create an opportunity to communicate your aspirations and expectations and establish that there is nowhere for individuals to hide from their responsibility as leaders of UTS. Feedback interviews will provide valuable insight that can be leveraged to strengthen the individual and collective leadership of the ULT.

## Feedback Interviews

A carefully designed feedback process will identify the underlying assumptions, mental models and embedded patterns that are influencing the ULT's performance. It will canvas the opinion of a range of people on the strengths, blind spots, developmental gaps and motivations of the ULT and what is required to shape a high-performance team and culture.

Interviews are structured as one-on-one conversations and are a rare opportunity for colleagues to provide confidential comment, which is synthesized through an independent lens. It is an appreciative process that enables those involved to separate assumption from fact, to be frank, and fearless in their comments, explore how they feel about the current reality and connect with their commitment to shaping a sustainable future.

This proposal centres on interviewing 20 people including the members of the ULT and other stakeholders who will be nominated by you. Interviews are generally 1.5 hours in duration, however past conversations with UTS leaders have seen many exceed this timeframe. This is a result of individuals valuing the opportunity to express themselves in a confidential forum. The interviews can be conducted in person or remotely and while the specific content of each will remain confidential, the key themes are synthesized into a detailed report.

While I will design the interview structure through consultation with you, the following is a high-level suggestion of outcomes that can be expected through targeted interviews:

- **Key Themes**

A granular understanding of the key themes that are shaping the ULT's culture, effectiveness and performance and their influence on the broader organisation.

- **Leadership**

Insight into:

- Each leader through their reflection on their engagement, leadership effectiveness and impact and what support (if any) they need to continue to grow as a leader.
- What they need from you and their colleagues to continue to develop as leaders and to shape a high-impact ULT.
- Insight into your leadership effectiveness, impact and influence in guiding the business through evolution, disruption and change.

## - **Performance**

Exploration of:

- Each leader's definition of 'high performance' and how this can be achieved.
- The ULT's role in shaping a vibrant culture and respectful behaviours in alignment with UTS' values.
- What leaders think needs to stop, continue and start to protect UTS' current business while adapting to and catalysing change to shape a sustainable future.
- How new recruits can be supported and integrated into the ULT and enabled for success.

Interviews of this nature produce rich insights and when the themes are clear, strategies can be developed to address them.

## **Business Terms**

### ***Professional Fees***

Consulting fees for this engagement are **s14, c14(c)(d)**. This equates to 10 consulting days at **s14, c14(c)(d)** per day. This is a reduction on standard fees of **s14, c14(c)(d)** per day in the spirit of partnership and acknowledgement of the importance of cost management.

I have allocated nine days for the interview process and one day to work with you and Michelle Callen to design forums you will lead with the ULT over the coming six months. I anticipate the interview process will take more than nine days to complete given the volume of information shared through the interviews and the time involved in synthesizing it. Additional time beyond that quoted will be absorbed at no cost to UTS.

The fees encompass:

- **The Interview Process:** liaising with you regarding the structure and composition of the feedback process and interviewees; designing the feedback interview; arranging and conducting 20 interviews; compiling, analysing and synthesising the data and writing a comprehensive feedback report; debriefing the report and key themes with you and considering the next steps.
- **Consulting:** leveraging insights from the feedback interviews to design initiatives you lead with the ULT to build trust and connectivity and to strengthen their leadership effectiveness and impact. It is assumed this will involve working with Michelle Callen and others in your team as required.

### ***Expenses***

All expenses, such as travel and accommodation, which occur during this work will be discussed and agreed as they arise. All expenses are passed on at cost.

### ***Payment Terms***

Payment terms are s14, cl4(c)(d) the completion of the feedback interviews.

Andrew, the feedback interviews are a unique opportunity for you and your team to reflect on how you work together and what you need from each other moving forward. I have knowledge of UTS, the trust of members of the ULT I have worked with in the past and the skill required to conduct this comprehensive and sensitive piece of work. I can work within your timeframe and can conduct the interviews in June if required.

I would be delighted to undertake this work and I look forward to discussing this with you.

Warm regards,

Julie Birtles  
**BEYOND EXCELLENCE PTY LTD**

## PROCUREMENT EXEMPTION APPROVAL \$10K TO \$250K

The purpose of this documents is to seek approval to: undertake a reduced number of quotations, enter into Direct Negotiations, or a Single Source procurement process; and to engage a supplier in order to procure goods/services/capital equipment. This form must be completed and approved prior the supplier being notified of the award and before committing to an agreement. All forms once completed and approved must be sent to [procurement@uts.edu.au](mailto:procurement@uts.edu.au)  
\*It is the responsibility of the requestor to ensure the availability of funds (budget) exists, and prior-approval to commit those funds is secured via delegated authority.

<b>Supplier Name/Service Description</b>	Julie Birtles – Beyond Excellence	
<b>Projected spend / Volume(s):</b>	s14, cl4(c)(d)	
<b>Period to be covered:</b>	2022	
<b>Faculty/Business/Department affected:</b>	Vice-Chancellor's Office	
<b>Responsible Manager</b>	Andrew Parfitt	
<b>Trim Reference</b>	TBC	
<b>Commercial Justification and recommendation for purchase:</b>	<p>Julie Birtles, Founder of Beyond Excellence is an Executive Leadership Coach with an impressive reputation working with very senior leaders in a variety of settings, including the university sector. Julie has worked with the current VC in his transition into the role. This engagement represents an extension of this support to the broader University Leadership Team (Dean's &amp; DVC's), a group that Julie has also worked with in the past, and thus it is appropriate to continue with Julie. Julie will be engaged for a further 6 month program (this is not limited by a number of hours) of Executive Coaching. Considering other leadership coaches for this engagement is not recommended as the most important component of the coaching relationship is trust between the coach and the coachee, and if we were to select another supplier we would need to invest a considerable amount of time into providing background to shape the relationship in preparation for working with the University Leadership team. The understanding that Julie already has about the operations and dynamics of the ULT is critical to the success of this engagement.</p> <p>We believe Beyond Excellence is uniquely positioned to deliver the key outcomes of this piece of work, that will help identity strengths, motivations and behaviors across ULT to help shape a high-performance team and culture.</p>	
<b>A Single Source, or Direct Negotiation ('flow-on' work) is required because:</b>		
Yes	No	There are no alternative suppliers for this purchase; and there are no comparable or alternate products which could provide a similar outcome;
Yes	No	Replacement or continuing supply of goods/services is required from this supplier for compatibility to an original supply, or to meet a manufacturer specification/warranty;
Yes	No	Insufficient time has been made available to complete this process in accordance with the UTS Procurement Policy; and a DVC has authorized this exemption to Procurement Policy [as detailed in the attached memo/email]
Yes	No	This purchase is in accordance with the Terms & Conditions of the Grant Funding Agreement, and the proposed supplier is named in the PRO / Project Number [insert]
<b>I am unable to obtain the mandatory number of quotations in accordance with UTS Policy and Procedures because:</b>		

Yes	No	There are insufficient suppliers in the market in order to obtain the mandatory number of quotations
Yes	No	Insufficient time has been made available to complete this process in accordance with the UTS Procurement Policy, and a DVC has authorized this exemption to Procurement Policy [as detailed in the attached memo/email]

**Supplier Quotes/Pricing Summary:**

Julie Birtles, Beyond Excellence up to	s14, cl4(c)(d)		
--	----------------	--	--

**DECLARATION OF APPROVER(S):**

- I **Andrew Parfitt** understand my obligations under the [UTS Code of Conduct](#) in relation to any [Conflict of Interest](#), and hereby declare I do not have any professional, personal or family allegiance, bias, inclination, obligation or loyalty which may affect my objectivity, independence or impartiality in approving this procurement. I do not have any personal financial interest in the goods/services being provided, nor to the best of my knowledge do any of my relatives or friends. Further, I warrant that I have not and will not discuss or share any information about this project with persons outside of the official Project Team, other than where such information is already publicly available; and

- I **Andrew Parfitt** confirm I am confident this exemption will yield the best value outcome for UTS. I have verified that:

Yes	No	There are no alternative suppliers for this purchase; and there are no comparable or alternate products which could provide a similar outcome;
Yes	No	There are insufficient suppliers in the market in order to obtain the mandatory number of quotations monopoly / oligopoly
Yes	No	Replacement or continuing supply of goods/services is required from this supplier for compatibility to an original supply, or to meet a manufacturer specification/warranty;
Yes	No	Insufficient time has been made available to complete this process in accordance with the UTS Procurement Policy; and a DVC has authorized this exemption to Procurement Policy [as detailed in the attached memo/email]
Yes	No	This purchase is in accordance with the Terms & Conditions of the Grant Funding Agreement, and the proposed supplier is named in the PRO / Project Number [insert]

Approver Name: Andrew Parfitt

Approver Name: .....

Approver Name: .....

Date: 21/06/2022

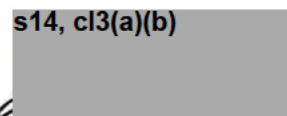
Date: .....

Date: .....

Title/Department: Vice-Chancellor & President

Title/Department: .....

Title/Department: .....

Signature: 

Signature: .....

Signature: .....

Document endorsed by CFO FSU: .....

Date: .....

**\*ALL FORMS MUST BE COMPLETED AND SENT TO [procurement@uts.edu.au](mailto:procurement@uts.edu.au) PRIOR TO UNDERTAKING YOUR PURCHASE**

Approval

**A Procurement Process exemption below \$250k is:**

- Where the prerequisite number of quotes cannot/or will not be obtained and exemption is required.

**The following steps are still required:**

- Declaration of Conflict of Interest/Confidentiality
- Commercial justification and recommendation for purchase
- Approval for award
- Notification to any unsuccessful suppliers
- Record all documents and meetings
- Contracts over \$150k Inc. GST are subject to [GIPA](#)

**A Exemption to Process is approved by:**

**Specialist Research Capital Equipment:**

- \$10k to \$50k DOA
- \$50k - \$100k Deans/Directors (Band 3+),
- \$100k - \$250k The Provost

**CAPEX / IT CAPEX:**

- \$10k to \$50k DOA
- \$50k to \$100k Deans/Directors (Band 3+),
- \$100k to \$250k CIO (IT), or Director PMO/FMO

**Goods & Services:**

- \$10k to \$50k DOA
- \$50k - \$100k Deans/Directors (Band 3+), or Strategic Procurement
- \$100k - \$250k Strategic Procurement

# TAX INVOICE

Professor Andrew Parfitt  
Vice-Chancellor & President  
University of Technology Sydney  
Building 1  
15 Broadway  
ULTIMO NSW 2000

**Invoice Date**  
28 Jul 2023

**Invoice Number**  
INV-1473

**ABN**  
18 790 253 181

Thriving Trust  
Attention: Julie Birtles  
Level 3  
50 Market Street  
MELBOURNE VIC 3000  
AUSTRALIA

Description	Quantity	Unit Price	GST	Amount AUD
Facilitating and debriefing <b>s14, c13(a)(b)</b> Leadership Circle feedback process and debrief.	1.00	<b>s14, c14(c)(d)</b>	10%	<b>s14, c14(c)(d)</b>
			Subtotal	
			TOTAL GST 10%	
			<b>TOTAL AUD</b>	

## Due Date: 25 Aug 2023

Banking Details:

Beyond Excellence

BSB: **s14, c14(c)(d)** Account No: **s14, c14(c)(d)**

If payment is made outside Australia

Swift Code: WPACAU2S

PLEASE QUOTE INVOICE NUMBER IN DESCRIPTION WHEN MAKING PAYMENTS

# PAYMENT ADVICE

To: Thriving Trust  
Attention: Julie Birtles  
Level 3  
50 Market Street  
MELBOURNE VIC 3000  
AUSTRALIA

**Customer** Professor Andrew Parfitt

**Invoice Number** INV-1473

**Amount Due** **s14, c14(c)(d)**

**Due Date** 25 Aug 2023

**Amount Enclosed**

Enter the amount you are paying above

# TAX INVOICE

Professor Andrew Parfitt  
Vice-Chancellor & President  
University of Technology Sydney  
Building 1  
15 Broadway  
ULTIMO NSW 2000

**Invoice Date**  
3 Aug 2022

**Invoice Number**  
INV-1408

**ABN**  
18 790 253 181

Beyond Excellence Pty Ltd  
Attention: Julie Birtles  
Level 3  
50 Market Street  
MELBOURNE VIC 3000  
AUSTRALIA

Description	Quantity	Unit Price	GST	Amount AUD
Six-month Executive Coaching with s14, c13(a)(b) s14, c13(a)(b)	1.00	s14, c14(c)(d)	10%	s14, c14(c)(d)
			Subtotal	
			TOTAL GST 10%	
			<b>TOTAL AUD</b>	

**Due Date: 31 Aug 2022**

Banking Details:

Beyond Excellence

BSB: s14, c14(c)(d) Account No: s14, c14(c)(d)

If payment is made outside Australia

Swift Code: WPACAU2S

PLEASE QUOTE INVOICE NUMBER IN DESCRIPTION WHEN MAKING PAYMENTS

## PAYMENT ADVICE

To: Beyond Excellence Pty Ltd  
Attention: Julie Birtles  
Level 3  
50 Market Street  
MELBOURNE VIC 3000  
AUSTRALIA

**Customer** Professor Andrew Parfitt  
**Invoice Number** INV-1408  
**Amount Due** s14, c14(c)(d)  
**Due Date** 31 Aug 2022

**Amount Enclosed**

Enter the amount you are paying above



## PROCUREMENT EXEMPTION APPROVAL \$10K TO \$250K

The purpose of this documents is to seek approval to: undertake a reduced number of quotations, enter into Direct Negotiations, or a Single Source procurement process; and to engage a supplier in order to procure goods/services/capital equipment. This form must be completed and approved prior the supplier being notified of the award and before committing to an agreement. All forms once completed and approved must be sent to [procurement@uts.edu.au](mailto:procurement@uts.edu.au)  
\*It is the responsibility of the requestor to ensure the availability of funds (budget) exists, and prior-approval to commit those funds is secured via delegated authority.

<b>Supplier Name/Service Description</b>	Julie Birtles – Beyond Excellence	
<b>Projected spend / Volume(s):</b>	s14, c14(e)	
<b>Period to be covered:</b>	2022	
<b>Faculty/Business/Department affected:</b>	People Unit	
<b>Responsible Manager</b>	Jennifer Lagoon	
<b>Trim Reference</b>	TBC	
<b>Commercial Justification and recommendation for purchase:</b>	Julie Birtles, Founder of Beyond Excellence is an Executive Leadership Coach with an impressive reputation working with very senior leaders in a variety of settings, including the university sector. Julie has previously worked with the s14, c13(a)(b) s14, c13(a)(b). This engagement represents the second extension of this support, thus it is appropriate to continue with Julie. Julie will be engaged for a further 6 month program (this is not limited by a number of hours) of Executive Coaching. Considering other leadership coaches for this engagement is not recommended as the most important component of the coaching relationship is trust between the coach and the coachee, which takes time to establish	
<b>A Single Source, or Direct Negotiation ('flow-on' work) is required because:</b>		
Yes	No	There are no alternative suppliers for this purchase; and there are no comparable or alternate products which could provide a similar outcome;
Yes	No	Replacement or continuing supply of goods/services is required from this supplier for compatibility to an original supply, or to meet a manufacturer specification/warranty;
Yes	No	Insufficient time has been made available to complete this process in accordance with the UTS Procurement Policy; and a DVC has authorized this exemption to Procurement Policy [as detailed in the attached memo/email]
Yes	No	This purchase is in accordance with the Terms & Conditions of the Grant Funding Agreement, and the proposed supplier is named in the PRO / Project Number [insert]
<b>I am unable to obtain the mandatory number of quotations in accordance with UTS Policy and Procedures because:</b>		
Yes	No	There are insufficient suppliers in the market in order to obtain the mandatory number of quotations monopoly / oligopoly
Yes	No	Insufficient time has been made available to complete this process in accordance with the UTS Procurement Policy; and a DVC has authorized this exemption to Procurement Policy [as detailed in the attached memo/email]
<b>Supplier Quotes/Pricing Summary:</b>		
Julie Birtles, Beyond Excellence s14, c14(e)(ii)	[.Insert supplier name.]	[.Insert supplier name.]



[.Insert supplier name.]	[.Insert supplier name.]	[.Insert supplier name.]
[.Insert supplier name.]	[.Insert supplier name.]	[.Insert supplier name.]

**DECLARATION OF APPROVER(S):**

- I **Fiona Thomas** understand my obligations under the [UTS Code of Conduct](#) in relation to any [Conflict of Interest](#), and hereby declare I do not have any professional, personal or family allegiance, bias, inclination, obligation or loyalty which may affect my objectivity, independence or impartiality in approving this procurement. I do not have any personal financial interest in the goods/services being provided, nor to the best of my knowledge do any of my relatives or friends. Further, I warrant that I have not and will not discuss or share any information about this project with persons outside of the official Project Team, other than where such information is already publicly available; and

- I **Fiona Thomas** confirm I am confident this exemption will yield the best value outcome for UTS. I have verified that:

Yes	No	There are no alternative suppliers for this purchase, and there are no comparable or alternate products which could provide a similar outcome;
Yes	No	There are insufficient suppliers in the market in order to obtain the mandatory number of quotations monopoly / oligopoly
Yes	No	Replacement or continuing supply of goods/services is required from this supplier for compatibility to an original supply, or to meet a manufacturer specification/warranty;
Yes	No	Insufficient time has been made available to complete this process in accordance with the UTS Procurement Policy; and a DVC has authorized this exemption to Procurement Policy <a href="#">[as detailed in the attached memo/email]</a>
Yes	No	This purchase is in accordance with the Terms & Conditions of the Grant Funding Agreement, and the proposed supplier is named in the PRO / Project Number <a href="#">[insert]</a>

Approver Name: **Fiona Thomas**

Approver Name: .....

Approver Name: .....

Date: **22/08/2022**

Date: .....

Date: .....

Title/Department: **Acting Director, People**

Title/Department: .....

Title/Department: .....

Signature:

**s14, c13(a)(b)**

Signature: .....

Signature: .....

Document endorsed by CFO FSU: .....

Date: .....

**\*ALL FORMS MUST BE COMPLETED AND SENT TO [procurement@uts.edu.au](mailto:procurement@uts.edu.au) PRIOR TO UNDERTAKING YOUR PURCHASE**

Approval

**A Procurement Process exemption below \$250k is:**

- Where the prerequisite number of quotes cannot/or will not be obtained and exemption is required.

**The following steps are still required:**

- Declaration of Conflict of Interest/Confidentiality
- Commercial justification and recommendation for purchase
- Approval for award
- Notification to any unsuccessful suppliers
- Record all documents and meetings
- Contracts over \$150k Inc. GST are subject to [GIPA](#)

**A Exemption to Process is approved by:**

**Specialist Research Capital Equipment:**

- \$10k to \$50k DOA
- \$50k - \$100k Deans/Directors (Band 3+),
- \$100k - \$250k The Provost

**CAPEX / IT CAPEX:**

- \$10k to \$50k DOA
- \$50k to \$100k Deans/Directors (Band 3+),
- \$100k to \$250k CIO (IT), or Director PMO/FMO

**Goods & Services:**

- \$10k to \$50k DOA
- \$50k - \$100k Deans/Directors (Band 3+), or Strategic Procurement
- \$100k - \$250k Strategic Procurement

## Schedule A to the Master Contractor Agreement

### Details

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**Item 1: Date of Master Contractor Agreement**

18-Mar-15

**Item 2: Contractor Details**

Contractor Name and Title: Julie Birtles

Company Name: Beyond Excellence Pty Ltd

ABN: 18 790 253 181

Address: Level 40, 140 William Street, Melbourne Vic 3000

Email: [juliebirtles@beyondexcellence.com.au](mailto:juliebirtles@beyondexcellence.com.au)

Contact number: T: +61 3 9607 8445

M: +61 417 562 322

**Item 3: UTS Details**

Contact Name and Title: Fiona Thomas

Faculty/Unit/Institution: Acting Director, People Unit

Address: University of Technology Sydney

PO BOX 123 ULTIMO NSW 2053

Contact Email: [Fiona.Thomas@uts.edu.au](mailto:Fiona.Thomas@uts.edu.au)

Alt Contact: Belinda Robinson  
Email: [Belinda.Robinson@uts.edu.au](mailto:Belinda.Robinson@uts.edu.au)  
Phone: 9514 4395

**Item 4: Services**

The Contractor will provide the following services and/or deliverables:

	<b>Service/deliverables</b>	<b>Date</b>	<b>Duration</b>
(a)	Negotiation of goals and outcomes for executive coaching <sup>s14, cl3(a)(b)</sup>	<b>From</b> August 2022	<b>To</b> August 2023
(b)	Six (6) six-month coaching engagement. Coaching is not limited to a set number of hours. In essence, the coach will match their energy with the coachee.  The impact of the coaching will be reviewed upon it's conclusion and an option to extend to 12mths will be considered depending on priorities at the time.	<b>From</b> August 2022	<b>To</b> August 2023
(d)	Reporting mid and end cycle	<b>As agreed</b>	
(e)	Project management and administration	<b>As agreed</b>	

**Item 5: Commencement and Completion Dates**

**Estimated Commencement Date:** August 2022

**Estimated Completion Date:** August 2023

**Item 6: Services Fees and Reimbursable Expenses**

**(a) Services Fees**

The services fees for this six (6) month engagement is total <sup>s14, cl4(c)(d)</sup> (excluding GST)

<sup>s14, cl4(c)(d)</sup> of the invoice to be paid on **s14, cl4(c)(d)**.

Each invoice must set out the amount of Services Fees plus any applicable GST. This is invoiced in full upon acceptance of this proposal.

**(b) Reimbursable Expenses**

UTS will not reimburse the Contractor's reasonable out of pocket expenses.

**Item 7 Insurance**

- (a) **Public liability insurance:** with a limit of indemnity of not less than \$[5] million dollars. Such insurance must be maintained from the Commencement Date until the Contractor ceases to provide the Services.
- (b) **Professional indemnity insurance:** with a limit of indemnity of not less than \$[1] million dollars and a deductible of not more than \$[20] thousand dollars. Such insurance must be maintained from the Commencement Date until 7 years after the date the Contractor ceases to provide the Services
- (c) workers compensation insurance in accordance with the *Workers Compensation Act 1987* (NSW) and the *Workplace Injury Management and Workers Compensation Act 1998* (NSW).

**Item 8 Termination notice**

Notice required by UTS: [30] days.

Item 9 UTS Website – location of policies and other instruments

**Policies and other instruments:** <http://www.gsu.uts.edu.au/policies>.

**Health and safety responsibilities:** <http://www.safetyandwellbeing.uts.edu.au/responsibilities/index.html>.

**Schedule B to the Master Contractor Agreement - Subcontractor's Statement  
Regarding Worker's Compensation, Payroll Tax and Remuneration – to be  
completed on submission of invoice if applicable.**

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For the purposes of this Statement a "subcontractor" is a person (or other legal entity) that has entered into a contract with a "principal contractor" to carry out work. **(Note1 – See End of Form)**

This Statement must be signed by a "subcontractor" (or by a person who is authorised, or held out as being authorised, to sign the statement by the subcontractor) referred to in any of s175B *Workers Compensation Act* 1987, Schedule 2 Part 5 *Payroll Tax Act* 2007, and s127 *Industrial Relations Act* 1996 where the "subcontractor" has employed or engaged workers or subcontractors during the period of the contract to which the form applies under the relevant Act(s). The signed Statement is to be submitted to the relevant principal contractor.

**SUBCONTRACTOR'S STATEMENT (Refer to the back of this form for Notes, period of Statement retention, and Offences under various Acts.**

Subcontractor: ..... ABN: .....  
(Business name)

of .....  
(Address of subcontractor)

has entered into a contract with the University of Technology, Sydney ABN: 77 257 686 961  
(Business name of principal contractor) **(Note 2)**

Contract number/identifier: N/A **(Note 3)**

This Statement applies for work between: ...../...../..... and ...../...../..... inclusive, **(Note 4)**

subject of the payment claim dated: ..... /...../..... **(Note 5)**

I, ..... a Director or a person authorised by the Subcontractor on whose behalf this declaration is made, hereby declare that I am in a position to know the truth of the matters which are contained in this Subcontractor's Statement and declare the following to the best of my knowledge and belief:

**(a)** The abovementioned Subcontractor has either employed or engaged workers or subcontractors during the above period of this contract. Tick [  ] if true and comply with **(b)** to **(g)** below, as applicable. If it is not the case that workers or subcontractors are involved or you are an exempt employer for workers compensation purposes tick [  ] and only complete **(f)** and **(g)** below. You must tick one box. **(Note 6)**

**(b)** All workers compensation insurance premiums payable by the Subcontractor in respect of the work done under the contract have been paid. The Certificate of Currency for that insurance is attached and is dated ...../...../..... **(Note 7)**

- (c) All remuneration payable to relevant employees for work under the contract for the above period has been paid. **(Note 8)**
- (d) Where the Subcontractor is required to be registered as an employer under the Payroll Tax Act 2007, the Subcontractor has paid all payroll tax due in respect of employees who performed work under the contract, as required at the date of this Subcontractor's Statement. **(Note 9)**
- (e) Where the Subcontractor is also a principal contractor in connection with the work, the Subcontractor has in its capacity of principal contractor been given a written Subcontractor's Statement by its subcontractor(s) in connection with that work for the period stated above. **(Note 10)**
- (f) Signature ..... Full name.....
- (g) Position/Title ..... Date ..... /...../.....

**NOTE:** Where required above, this Statement must be accompanied by the relevant Certificate of Currency to comply with section 175B of the Workers Compensation Act 1987.

**Notes**

1. This form is prepared for the purpose of section 175B of the Workers Compensation Act 1987, Schedule 2 Part 5 Payroll Tax Act 2007 and section 127 of the Industrial Relation Act 1996. If this form is completed in accordance with these provisions, a principal contractor is relieved of liability for workers compensation premiums, payroll tax and remuneration payable by the subcontractor.

A principal contractor can be generally defined to include any person who has entered into a contract for the carrying out of work by another person (or other legal entity called **the subcontractor**) and where employees of the subcontractor are engaged in carrying out the work which is in connection with the principal contractor's business.

2. For the purpose of this Subcontractor's Statement, a principal contractor is a person (or other legal entity), who has entered into a contract with another person (or other legal entity) referred to as the subcontractor, and employees/workers of that subcontractor will perform the work under contract. The work must be connected to the business undertaking of the principal contractor.
3. Provide the unique contract number, title, or other information that identifies the contract.
4. In order to meet the requirements of s127 Industrial Relations Act 1996, a statement in relation to remuneration must state the period to which the statement relates. For sequential Statements ensure that the dates provide continuous coverage.

Section 127(6) of the Industrial Relations Act 1996 defines remuneration 'as remuneration or other amounts payable to relevant employees by legislation, or under an industrial instrument, in connection with work done by the employees.'

Section 127(11) of the Industrial Relations Act 1996 states 'to avoid doubt, this section extends to a principal contractor who is the owner or occupier of a building for the carrying out of work in connection with the building so long as the building is owned or occupied by the principal contractor in connection with a business undertaking of the principal contractor.'

5. Provide the date of the most recent payment claim.
6. For Workers Compensation purposes an exempt employer is an employer who pays less than \$7500 annually, who does not employ an apprentice or trainee and is not a member of a group.
7. In completing the Subcontractor's Statement, a subcontractor declares that workers compensation insurance premiums payable up to and including the date(s) on the Statement have been paid, and all premiums owing during the term of the contract will be paid.
8. In completing the Subcontractor's Statement, a subcontractor declares that all remuneration payable to relevant employees for work under the contract has been paid.
9. In completing the Subcontractor's Statement, a subcontractor declares that all payroll tax payable relating to the work undertaken has been paid.
10. It is important to note that a business could be both a subcontractor and a principal contractor, if a business 'in turn' engages subcontractors to carry out the work. If your business engages a subcontractor you are to also obtain Subcontractor's Statements from your subcontractors.

### **Statement Retention**

The principal contractor receiving a Subcontractor's Statement must keep a copy of the Statement for the periods stated in the respective legislation. This is currently up to seven years.

### **Offences in respect of a false Statement**

In terms of s127(8) of the Industrial Relations Act 1996, a person who gives the principal contractor a written statement knowing it to be false is guilty of an offence if:

- (a) the person is the subcontractor;
- (b) the person is authorised by the subcontractor to give the statement on behalf of the subcontractor; or
- (c) the person holds out or represents that the person is authorised by the subcontractor to give the statement on behalf of the subcontractor.

In terms of s175B of the Workers Compensation Act and clause 18 of Schedule 2 of the Payroll Tax Act 2007 a person who gives the principal contractor a written statement knowing it to be false is guilty of an offence.

### **Further Information**

For more information, visit the WorkCover website [www.workcover.nsw.gov.au](http://www.workcover.nsw.gov.au), Office of State Revenue website [www.osr.nsw.gov.au](http://www.osr.nsw.gov.au), or Office of Industrial Relations website, Department of Commerce website [www.commerce.nsw.gov.au](http://www.commerce.nsw.gov.au). Copies of the Workers Compensation Act 1987, the Payroll Tax Act 2007 and the Industrial Relations Act 1996 can be found at [www.legislation.nsw.gov.au](http://www.legislation.nsw.gov.au)

## Execution page

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Executed as an agreement

**SIGNED** by **UNIVERSITY OF TECHNOLOGY SYDNEY (ABN 77 257 686 961)** by its authorised representative in the presence of:

**s14, cl3(a)(b)**

---

Signature of Authorised Representative

**FIONA THOMAS**

---

Full Name of Authorised Representative

**22/08/2022**

---

Date

**s14, cl3(a)(b)**

---

Signature of Witness

**FATIMA VILLAVERT**

---

Full Name of Witness

**SIGNED** by Beyond Excellence Pty Ltd (18 790 253 181) by two Directors or a Director and a Secretary in accordance with section 127 of the Corporations Act 2001 (Cth):

---

Signature of Director

---

Full Name of Director

---

Date

---

Signature of Director/Secretary

---

Full Name of Director/Secretary

# TAX INVOICE

Professor Andrew Parfitt  
Vice-Chancellor & President  
University of Technology Sydney  
Building 1  
15 Broadway  
ULTIMO NSW 2000

**Invoice Date**  
9 Nov 2022

**Invoice Number**  
INV-1439

**ABN**  
18 790 253 181

Beyond Excellence Pty Ltd  
Attention: Julie Birtles  
Level 3  
50 Market Street  
MELBOURNE VIC 3000  
AUSTRALIA

Description	Quantity	Unit Price	GST	Amount AUD
Facilitation of the UTS University Leadership Team Retreat on Tuesday 8th of November 2022.	1.00	§14, c14(c)(d)	10%	§14, c14(c)(d)
			Subtotal	
			TOTAL GST 10%	
			<b>TOTAL AUD</b>	

## Due Date: 7 Dec 2022

Banking Details:

Beyond Excellence

BSB: §14, c14(c)(d) Account No: §14, c14(c)(d)

If payment is made outside Australia

Swift Code: WPACAU2S

PLEASE QUOTE INVOICE NUMBER IN DESCRIPTION WHEN MAKING PAYMENTS

# PAYMENT ADVICE

To: Beyond Excellence Pty Ltd  
Attention: Julie Birtles  
Level 3  
50 Market Street  
MELBOURNE VIC 3000  
AUSTRALIA

**Customer** Professor Andrew Parfitt

**Invoice Number** INV-1439

**Amount Due** §14, c14(c)(d)

**Due Date** 7 Dec 2022

**Amount Enclosed**

Enter the amount you are paying above

**Schedule B Contract to the Master Contractor Agreement**

**Contract**

**Item 1 Date of Master Contractor Agreement**

18-Mar-15

**Item 2 Services**

The Contractor will provide the following services and/or deliverables:

	Service/deliverables	Date	Duration
(a)	Negotiation of goals and outcomes for executive coaching in the Faculty of Engineering and Information Technology	From December 2022	To August 2023
(b)	Six-month engagement. Coaching is not limited to a set number of hours and is flexible to change in frequency, cadence and duration over the course of the engagement.	From December 2022	To August 2023
(c)	This includes supervisor involvement	From December 2022	To August 2023
(d)	Reporting mid and end cycle	As agreed	
(e)	Project management and administration	As agreed	

**Item 3 Commencement and Completion Dates**

Estimated Commencement Date: December 2022

Estimated Completion Date: August 2023

**Item 4 Services Fees and Reimbursable Expenses**

(a) Services Fees

The services fees are s14, c14(c)(d) (excluding GST)

Each invoice must set out the amount of Services Fees plus any applicable GST. Invoice to be paid s14, c14(c)(d).

(b) Reimbursable Expenses

Not applicable.

**Item 5 Date of this Contract**

Date that this Contract has been signed by both parties.

**Item 6 Contractor Details**

Contact Name and Title Ian Banister (Beyond Excellence PTY LTD)  
Address: Level 40, 140 William Street, Melbourne Vic 3000  
Email: ianbanister@beyondexcellence.com.au  
Contact number: s14, c13(a)(b).

**Item 1 UTS Details**

Contact Name and Title Lesley Hitchens (Provost & Senior Vice-President)  
Faculty/Unit/Institution: Provost  
Address: PO Box 123 Broadway NSW 2007 Australia  
Email: Lesley.Hitchens@uts.edu.au  
Contact number: 9514 1350  
Alt Contact: Melissa Oey (Executive Assistant to Provost and Senior Vice-President) Melissa.Oey@uts.edu.au

The Parties agree to the terms and conditions of this Contract as of date of this Contract, and further agree that this Contract will become part of the Master Contractor Agreement upon execution by the Parties.

Signed for and on behalf of **[Beyond Excellence  
PTY LTD]** by its authorised representative:  
**s14, c13(a)(b)**

[Redacted signature area]

\_\_\_\_\_  
Signature of authorised officer

\_\_\_\_\_  
Full name of authorised officer

\_\_\_\_\_  
Date

Signed for an on behalf of **University of  
Technology Sydney** by its authorised  
representative:

**Professor Lesley Hitchens**

\_\_\_\_\_  
Signature of authorised officer

**s14, c13(a)(b)**  
[Redacted signature area]

\_\_\_\_\_  
Full name of authorised officer

12 . 06 . 2022  
\_\_\_\_\_  
Date

# TAX INVOICE

Lesley Hitchens  
Acting Provost and Senior Vice President  
University of Technology Sydney  
PO Box 123 Broadway  
SYDNEY NSW 2007

**Invoice Date**  
22 Dec 2022

**Invoice Number**  
INV-1445

**ABN**  
18 790 253 181

Beyond Excellence Pty Ltd  
Attention: Julie Birtles  
Level 3  
50 Market Street  
MELBOURNE VIC 3000  
AUSTRALIA

Description	Quantity	Unit Price	GST	Amount AUD
6 month coaching engagement for s14, c13(a)(b) with Ian Banister.	1.00	s14, c14(c)(d)	10%	s14, c14(c)(d)
			Subtotal	
			TOTAL GST 10%	
			<b>TOTAL AUD</b>	

## Due Date: 19 Jan 2023

Banking Details:

Beyond Excellence

BSB: s14, c14(c)(d) Account No: s14, c14(c)(d)

If payment is made outside Australia

Swift Code: WPACAU2S

PLEASE QUOTE INVOICE NUMBER IN DESCRIPTION WHEN MAKING PAYMENTS

# PAYMENT ADVICE

To: Beyond Excellence Pty Ltd  
Attention: Julie Birtles  
Level 3  
50 Market Street  
MELBOURNE VIC 3000  
AUSTRALIA

**Customer** Lesley Hitchens  
**Invoice Number** INV-1445  
**Amount Due** s14, c14(c)(d)  
**Due Date** 19 Jan 2023

**Amount Enclosed**

Enter the amount you are paying above

# TAX INVOICE

Lesley Hitchens  
Acting Provost and Senior Vice President  
University of Technology Sydney  
PO Box 123 Broadway  
SYDNEY NSW 2007

**Invoice Date**  
22 Dec 2022

**Invoice Number**  
INV-1444

**ABN**  
18 790 253 181

Beyond Excellence Pty Ltd  
Attention: Julie Birtles  
Level 3  
50 Market Street  
MELBOURNE VIC 3000  
AUSTRALIA

Description	Quantity	Unit Price	GST	Amount AUD
6 month coaching engagement for s14, c13(a)(b) with Ian Banister.	1.00	s14, c14(c)(d)	10%	s14, c14(c)(d)
			Subtotal	
			TOTAL GST 10%	
			<b>TOTAL AUD</b>	

## Due Date: 19 Jan 2023

Banking Details:

Beyond Excellence

BSB: s14, c14(c)(d) Account No: s14, c14(c)(d)

If payment is made outside Australia

Swift Code: WPACAU2S

PLEASE QUOTE INVOICE NUMBER IN DESCRIPTION WHEN MAKING PAYMENTS

# PAYMENT ADVICE

To: Beyond Excellence Pty Ltd  
Attention: Julie Birtles  
Level 3  
50 Market Street  
MELBOURNE VIC 3000  
AUSTRALIA

**Customer** Lesley Hitchens  
**Invoice Number** INV-1444  
**Amount Due** s14, c14(c)(d)  
**Due Date** 19 Jan 2023

**Amount Enclosed**

Enter the amount you are paying above

**Schedule B Contract to the Master Contractor Agreement****Contract****Item 1 Date of Master Contractor Agreement**

18-Mar-15

**Item 2 Services**

The Contractor will provide the following services and/or deliverables:

	<b>Service/deliverables</b>	<b>Date</b>	<b>Duration</b>
(a)	Negotiation of goals and outcomes for executive coaching in the Faculty of Science	<b>From</b> December 2022	<b>To</b> August 2023
(b)	Six-month engagement. Coaching is not limited to a set number of hours and is flexible to change in frequency, cadence and duration over the course of the engagement.	<b>From</b> December 2022	<b>To</b> August 2023
(c)	This includes supervisor involvement	<b>From</b> December 2022	<b>To</b> August 2023
(d)	Reporting mid and end cycle	<b>As agreed</b>	
(e)	Project management and administration	<b>As agreed</b>	

**Item 3 Commencement and Completion Dates**

Estimated Commencement Date: December 2022

Estimated Completion Date: August 2023

**Item 4 Services Fees and Reimbursable Expenses****(a) Services Fees**

The services fees are s14, c14(c)(d) (excluding GST)

Each invoice must set out the amount of Services Fees plus any applicable GST.

Invoice to be paid s14, c14(c)(d) s14, c14(c)(d).

**(b) Reimbursable Expenses**

Not applicable.

**Item 5 Date of this Contract**

Date that this Contract has been signed by both parties.

**Item 6 Contractor Details**

Contact Name and Title Ian Banister (Beyond Excellence PTY LTD)  
Address: Level 40, 140 William Street, Melbourne Vic 3000  
Email: ianbanister@beyondexcellence.com.au  
Contact number: s14, c13(a)(b)

**Item 1 UTS Details**

Contact Name and Title Lesley Hitchens (Provost & Senior Vice-President)  
and Vicki Chen (Provost (Designate))  
Faculty/Unit/Institution: Provost  
Address: PO Box 123 Broadway NSW 2007 Australia  
Email: [Lesley.Hitchens@uts.edu.au](mailto:Lesley.Hitchens@uts.edu.au) /  
[Vicki.Chen@uts.edu.au](mailto:Vicki.Chen@uts.edu.au)  
Contact number: 9514 1350 (Lesley)  
Alt Contact: Melissa Oey (Executive Assistant to Provost and  
Senior Vice-President) [Melissa.Oey@uts.edu.au](mailto:Melissa.Oey@uts.edu.au)

The Parties agree to the terms and conditions of this Contract as of date of this Contract, and further agree that this Contract will become part of the Master Contractor Agreement upon execution by the Parties.

Signed for and on behalf of **[Beyond Excellence  
PTY LTD]** by its authorised representative:

s14, cl3(a)(b)



Signature of authorised officer

Full name of authorised officer

Date

Signed for an on behalf of **University of  
Technology Sydney** by its authorised  
representative:

s14, cl3(a)(b)



Signature of authorised officer

**Professor Lesley Hitchens**

Full name of authorised officer

22. xii. 2022

Date

# UTS HIGH IMPACT LEADERSHIP



# Strategic Context

BEyondExcellence

- The **Australian higher education sector** has been buffeted over recent years by a range of diverse influences. While UTS has adapted, shaping a sustainable future requires balancing BAU with innovation and transformation to remain agile, relevant and sustainable. This requires equipping leaders with the contemporary skills needed in today's dynamic environment.
- **Leadership development** has grown into a significant global industry yet traditional approaches have struggled to keep up with the dramatic pace of change leaving leaders ill-equipped. Harvard's research identified global organisations spend \$60b a year on leadership development, with around 10% reporting concrete results.\*
- **Contemporary leaders** require a combination of leadership skills and expansive capacities to enable them to make sense of complex systems. Only around 5% of leaders can catalyse and lead large-scale change and growing the ranks of these leaders is essential to tackle big issues.
- Supporting UTS' leaders to build **contemporary leadership capabilities** will enable the 2027 strategy and strengthen their impact. UTS is exploring options to support and develop various cohorts of leaders. The following outlines key considerations in designing contemporary leadership development initiatives that are high-impact and transformational.

\*Reference: Yemiscigil, Ayse, Dana Born, Horace Ling. "What Makes Leadership Development Programs Succeed?." Harvard Business Review, 2023

# The Opportunity:

Investing in UTS'  
leaders will:

Build the contemporary leadership confidence, capability and impact required to ***navigate increasing disruption, speed and change.***

Foster distributed leadership ***reinforcing everyone has a role to play in shaping UTS' success.***

Create ***shared awareness, language and experience,*** strengthening trust, resilience and impact.

***Targeted development*** for different leadership cohorts, reinforcing UTS' commitment to its leaders and their role in shaping its collective future.

Work together ***to inspire innovation, a high-performance culture and excellence*** to deliver the 2027 strategy and beyond.

# The Challenge

1

**Context:** the forces shaping higher education and society more broadly calls for *a new form of leader*. This talks to a new skill.

2

**Flexibility:** UTS' diverse leadership cohorts (ULT, ELT, mid-career and Heads of Schools), *require different skills and targeted development*.

3

**Meaning-making:** fostering an *expansive worldview and capabilities* enables adaptive, inclusive and resilient leadership.

4

**Design:** *integrating* new leadership development initiatives into existing UTS frameworks and developmental approaches.

5

**Adaptive:** creating *high-impact learning experiences* that get cut through with leaders who are managing demanding workloads.

6

**Impact:** *quantifying the value* of investing in leadership development will inspire transparency, accountability and continuous improvement.

# Progressive Design

1

**Holistic:** modern leadership initiatives take a *whole-person and systems approach* to development.

2

**Unique:** bespoke design, generate *personal and organisational transformations*.

3

**Amplify:** creating a *program of change* will elevate leadership within UTS and inspire innovation, change and competitive advantage.

4

**Curation:** the design of leadership initiatives *requires balancing learning with stretch* to strengthen individual and collective impact.

5

**Targeted:** tailoring support to *different leadership cohorts* will optimise learning, connections and collaboration and maximise UTS' investment.

6

**Transformational:** there is nowhere for UTS leaders to hide from their responsibilities in shaping a high-performance culture.

# Developmental Framework

*BEyondExcellence*

A progressive leadership design centres on three pillars and variable building blocks.

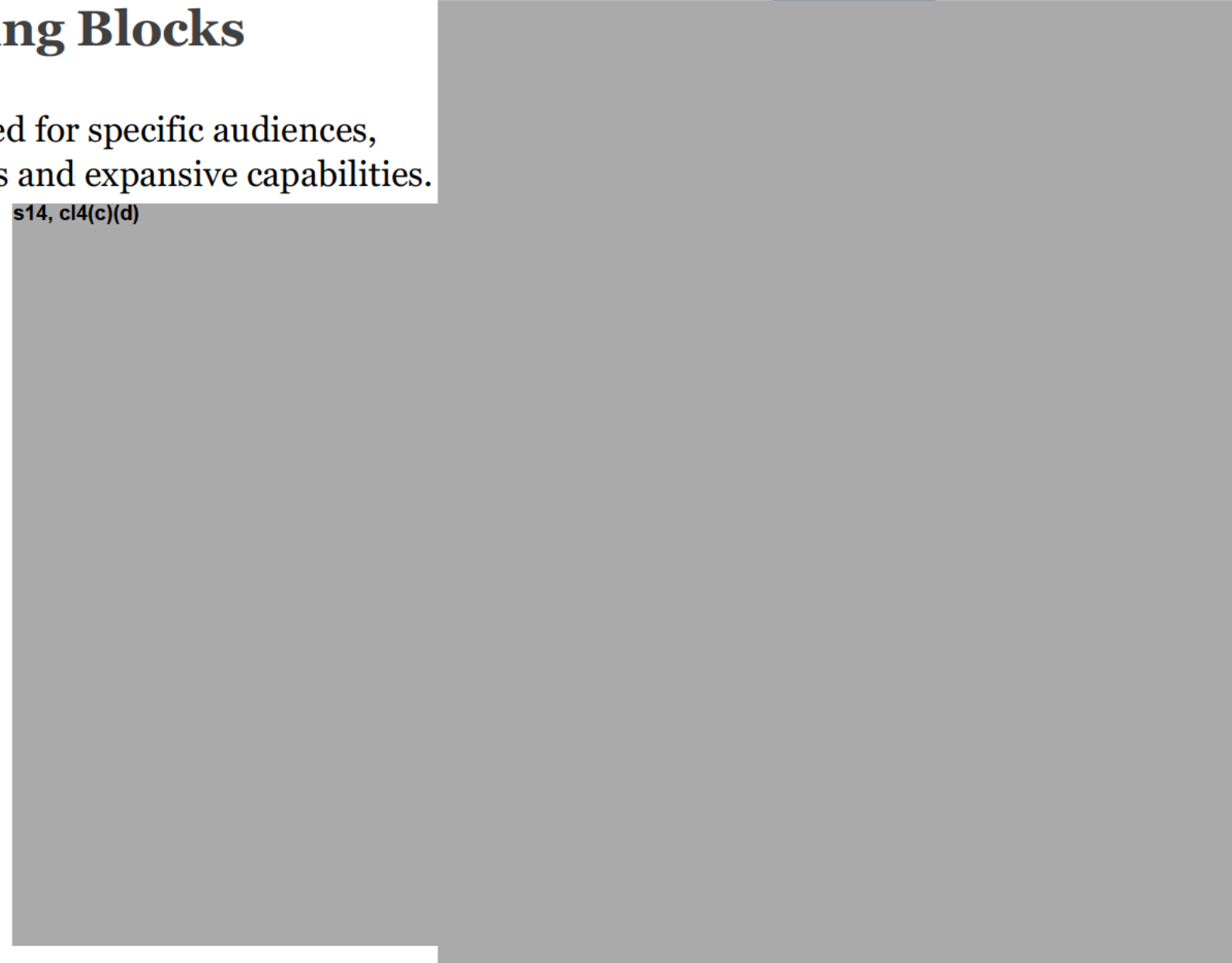
## Three Pillars

<b>Reimagine:</b> Systemic Context	<b>Rethink:</b> Strengthening Leadership	<b>Reframe:</b> Working Together
Foster the expansive mindset, critical thinking, capability and confidence required to deliver the 2027 strategy while shaping a sustainable future.	Progressive curriculum exploring contemporary leadership capabilities and the confidence required in disrupted environments and more complex roles.	Addressing issues that matter and inspiring change through innovation, collaboration, peer coaching and learning from experts, industry leaders and partners.

## Variable Building Blocks

Program design is curated for specific audiences, building leadership skills and expansive capabilities.

s14, cl4(c)(d)



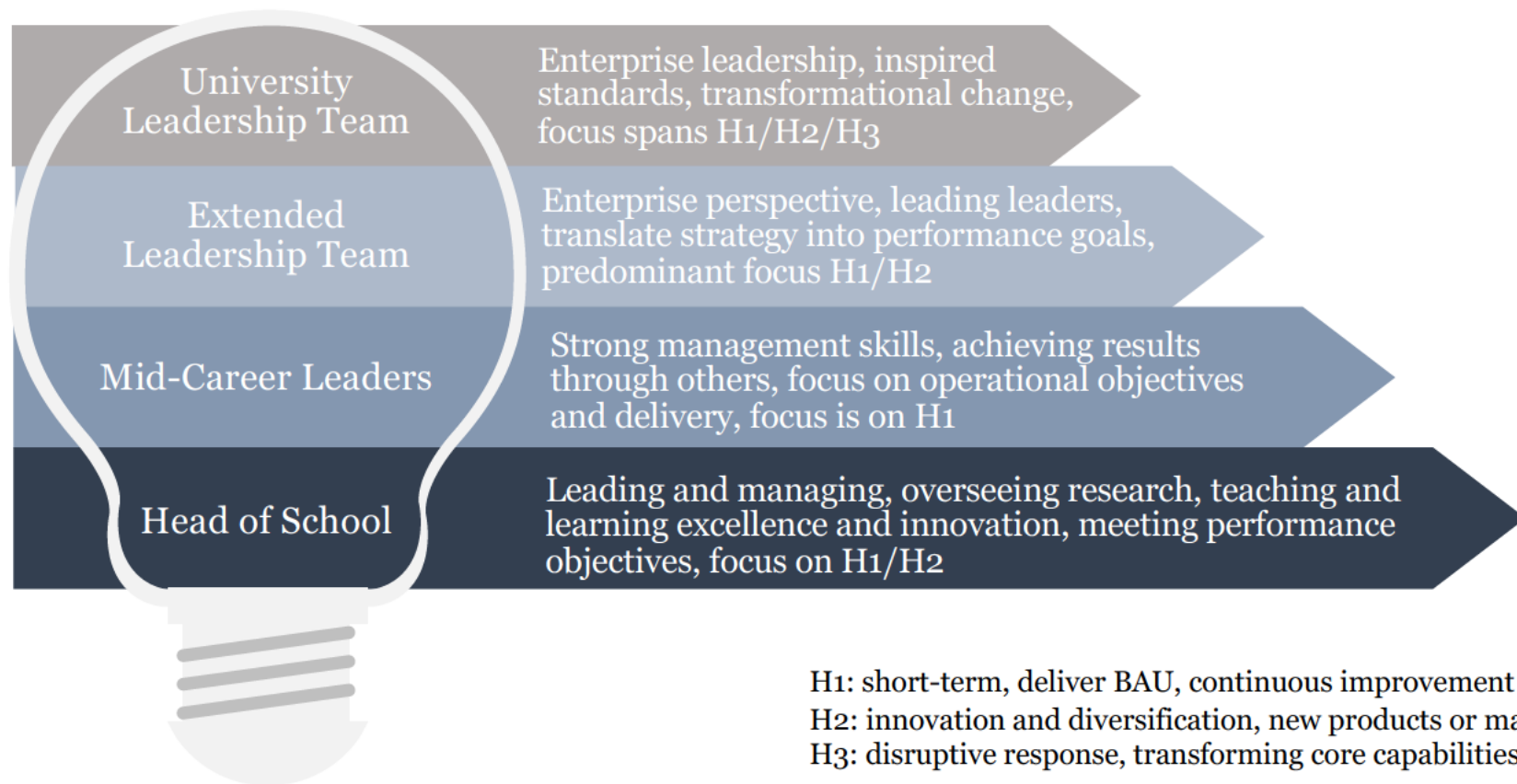
This is achieved  
through ...



# Targeted Approach

BEyondExcellence

Different cohorts have diverse learning needs. Program design and duration are shaped by this.



# Next steps

*BE*yond*Excellence*

1

Engage with stakeholders to map existing developmental frameworks and how they can be leveraged in the design of new leadership initiatives.

2

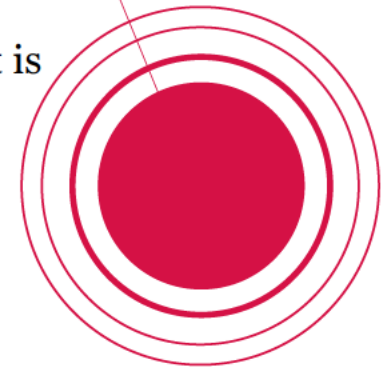
Identify the UTS leadership cohorts and their development needs.

3

Design high-impact leadership initiatives tailored to each cohort and what is possible such as learning needs, availability, duration and budget.

4

Develop a comprehensive communication plan to build awareness and engagement followed by rollout of specific leadership initiatives.



# TAX INVOICE

Professor Andrew Parfitt  
Vice-Chancellor & President  
University of Technology Sydney  
Building 1  
15 Broadway  
ULTIMO NSW 2000

**Invoice Date**  
28 Jul 2023

**Invoice Number**  
INV-1474

**ABN**  
18 790 253 181

Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

Description	Quantity	Unit Price	GST	Amount AUD
Undertaking interviews with 17 UTS leaders including the design and facilitation of the process, interviewing leaders, synthesising and debriefing key insights.	1.00	s14, c14(c)(d)	10%	s14, c14(c)(d)
			Subtotal	
			TOTAL GST 10%	
			<b>TOTAL AUD</b>	

## Due Date: 25 Aug 2023

Banking Details:

Beyond Excellence

BSB: s14, c14(c)(d) Account No: s14, c14(c)(d)

If payment is made outside Australia

Swift Code: WPACAU2S

PLEASE QUOTE INVOICE NUMBER IN DESCRIPTION WHEN MAKING PAYMENTS

# PAYMENT ADVICE

To: Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

**Customer** Professor Andrew Parfitt

**Invoice Number** INV-1474

**Amount Due** s14, c14(c)(d)

**Due Date** 25 Aug 2023

**Amount Enclosed**

Enter the amount you are paying above

# TAX INVOICE

Professor Andrew Parfitt  
Vice-Chancellor & President  
University of Technology Sydney  
Building 1  
15 Broadway  
ULTIMO NSW 2000

**Invoice Date**  
28 Jul 2023

**Invoice Number**  
INV-1472

**ABN**  
18 790 253 181

Thriving Trust  
Attention: Julie Birtles  
Level 3  
50 Market Street  
MELBOURNE VIC 3000  
AUSTRALIA

Description	Quantity	Unit Price	GST	Amount AUD
Facilitating and debriefing Leadership Circle feedback process and debrief.	1.00	s14, c14(c)(d)	10%	s14, c14(c)(d)
			Subtotal	
			TOTAL GST 10%	
			<b>TOTAL AUD</b>	

## Due Date: 25 Aug 2023

Banking Details:

Beyond Excellence

BSB: s14, c14(c)(d) Account No: s14, c14(c)(d)

If payment is made outside Australia

Swift Code: WPACAU2S

PLEASE QUOTE INVOICE NUMBER IN DESCRIPTION WHEN MAKING PAYMENTS

# PAYMENT ADVICE

To: Thriving Trust  
Attention: Julie Birtles  
Level 3  
50 Market Street  
MELBOURNE VIC 3000  
AUSTRALIA

**Customer** Professor Andrew Parfitt

**Invoice Number** INV-1472

**Amount Due** s14, c14(c)(d)

**Due Date** 25 Aug 2023

**Amount Enclosed**

Enter the amount you are paying above

**Schedule B Contract to the Master Contractor Agreement****Contract****Item 1 Date of Master Contractor Agreement**

18-Mar-15

**Item 2 Services**

The Contractor will provide the following services and/or deliverables:

	<b>Service/deliverables</b>	<b>Date</b>	<b>Duration</b>
(a)	Negotiation of goals and outcomes for executive coaching in the Faculty of Science	<b>From</b> Sept 23	<b>To</b> Oct 23
(b)	Extension of current engagement for another, six-months. Coaching is not limited to a set number of hours and is flexible to change in frequency, cadence and duration over the course of the engagement.	<b>From</b> Sept 23	<b>To</b> Sept 24
(d)	Reporting mid and end cycle	<b>As agreed</b>	
(e)	Project management and administration	<b>As agreed</b>	

**Item 3 Commencement and Completion Dates**

Estimated Commencement Date: Sept 23

Estimated Completion Date: Sept 24

**Item 4 Services Fees and Reimbursable Expenses**

## (a) Services Fees

The services fees are **s14, cl4(c)(d)** (excluding GST)

Each invoice must set out the amount of Services Fees plus any applicable GST.

## (b) Reimbursable Expenses

Not applicable.

**Item 5 Date of this Contract**

Date that this Contract has been signed by both parties.

**Item 6 Contractor Details**

Contact Name and Title Ian Banister (Beyond Excellence PTY LTD)  
Address: Level 40, 140 William Street, Melbourne Vic 3000  
Email: ianbanister@beyondexcellence.com.au  
Contact number: **s14, cl3(a)(b)**

**Item 7 UTS Details**

Contact Name and Title Mark Cox Executive Director, People and Culture  
Faculty/Unit/Institution: People Unit  
Address: University of Technology Sydney  
PO Box 123  
Ultimo NSW 2007 Australia  
Email: Mark.Cox@uts.edu.au  
Contact number: +61 2 9514 4679  
Alt Contact: Belinda Robinson (Leadership and Coaching Specialist [Belinda.Robinson@uts.edu.au](mailto:Belinda.Robinson@uts.edu.au), +61 2 9514 4395)

The Parties agree to the terms and conditions of this Contract as of date of this Contract, and further agree that this Contract will become part of the Master Contractor Agreement upon execution by the Parties.

Signed for and on behalf of **[Beyond Excellence  
PTY LTD]** by its authorised representative:  
s14, cl3(a)(b)

\_\_\_\_\_  
Signature of authorised officer

\_\_\_\_\_  
Full name of authorised officer

\_\_\_\_\_  
Date

Signed for an on behalf of **University of  
Technology Sydney** by its authorised  
representative: s14, cl3(a)(b)

\_\_\_\_\_  
Signature of authorised officer

**MARK COX**

\_\_\_\_\_  
Full name of authorised officer

**20/09/2023**

\_\_\_\_\_  
Date

**be** /bi:/ *v. & v.aux.* (*sing. present* **am** /æm, əm/; **are** /a:, ə/; **is** /ɪz/; *pl. present* **are**; *1st and 3rd sing. past* **was** /wɒz, weɪz/; *2nd sing. past and pl. past* **were** /wɜ:, we/; *present subj.* **be**; *past subj.* **were**; *pres. part.* **being**; *past part.* **been** /bi:n/) • *v.intr.* **1** (often prec. by *there*)

**BE**yondExcellence

PO Box 194, Hamilton VIC 3300

9 October 2023

Professor Andrew Parfitt  
Vice Chancellor and President  
University of Technology Sydney  
Building 1, 15 Broadway  
Ultimo NSW 2007

Dear Andrew,

Further to our discussion last week, thank you for the opportunity to provide a proposal to work with UTS' senior leaders over the coming months.

The following outlines the scope of the engagement and estimated fees.

### Strategic Context

Recent feedback identified a shift in the organisational tone and a need for sophisticated leadership to foster trust, and engagement and to steer the organisation through continuing change and transformation.

Investing in leadership development at this time highlights the critical importance of individual and collective contribution and impact. Carefully designed and executed, focused development will reinforce that each leader has a role to play in shaping engagement, culture and performance. The suggested approach and compressed timeframe will ensure there is nowhere for individuals to hide from their responsibilities as senior leaders.

### Scope of Work

This engagement spans working with UTS' senior leaders, including:

- Focused **individual leadership development** with **s14, cl3(a)(b)** to strengthen their enterprise leadership and impact.
- **Collective leadership development** with **s14, cl3(a)(b)** to establish unity on key priorities and how you work together to signal and drive change.

- Leadership development with a **broader leadership group** including members of the ULT, **s14, cl3(a)(b)** to foster:
  - o **Engagement:** explore how individuals feel and ways to overcome real and perceived barriers in shaping the current reality and future state.
  - o **Capacity Building:** develop individual and collective leadership confidence, capability, and sophistication required to steer the organisation through the budget process and continuing change.
  - o **Alignment:** strengthen the alignment, trust and impact of the ULT and the mindset, behaviours and ways of working required as a high-performing team.
  - o **Inspiration:** encourage opportunity, stretch and challenge to inspire innovation, collaboration and revenue generation.
  - o **Impact:** strengthen the impact of UTS' leaders through distributed leadership, a culture of accountability and resilience to drive behaviour change, reform and large-scale change.

This is not a comprehensive list, and consulting days will be used to optimise the time, capacity and impact of UTS' senior leaders. I will liaise with you on how we measure the impact of this work.

### Timeline and Business Terms

This proposal centres on 20 consulting days spanning 10 weeks between the 9<sup>th</sup> of October to the 15<sup>th</sup> December 2023.

Professional fees for 20 consulting days are **s14, cl4(c)(d)**. This fee is at the established daily rate of **s14, cl4(c)(d)** for UTS, which is a reduction from the standard rate of **s14, cl4(c)(d)**. This offers a **s14, cl4(c)(d)** reduction in fees to UTS in the spirit of partnership and recognition of the importance of cost management.

Quoted fees are exclusive of GST. Expenses will be agreed upon and passed on at cost.

This proposal does not include facilitating and debriefing **s14, cl3(a)(b)** 360° assessment, which will be undertaken as a separate engagement.

### Impact

An engagement of this nature will generate obvious and subtle benefits to individuals and UTS. It is only in hindsight that the true value reveals itself. At the commencement phase, an outline of expected benefits includes:


- Supporting you to lead through a period of continuing change and disruption.
- Shining a light on individual accountability, the need to balance domain responsibilities with enterprise leadership and the sophistication to focus on the right things.
- Equipping leaders with the skills to influence others, overcome obstacles and lead through difference and conflict.
- Encouraging an expansive mindset and collaborative way of working to unlock capacity, leverage UTS' distinctiveness and generate new sources of revenue.

- Focusing on the work that only the ULT can do and the attitude, trust and behaviours required to realise it.

I look forward to discussing this proposal with you.

Warm regards,

s14, c13(a)(b)

A large grey rectangular redaction box covers the signature area. The text 's14, c13(a)(b)' is visible at the top left of the redaction. A small portion of a signature is visible on the left edge of the redaction.

Julie Birtles

# TAX INVOICE

Professor Andrew Parfitt  
Vice-Chancellor & President  
University of Technology Sydney  
Building 1  
15 Broadway  
ULTIMO NSW 2000

**Invoice Date**  
12 Oct 2023

**Invoice Number**  
INV-1479

**ABN**  
18 790 253 181

Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

Description	Quantity	Unit Price	GST	Amount AUD
Leadership Development	1.00	s14, c14(c)(d)	10%	s14, c14(c)(d)
			Subtotal	
			TOTAL GST 10%	
			<b>TOTAL AUD</b>	

## Due Date: 10 Nov 2023

Banking Details:

Beyond Excellence

BSB: s14, c14(c)(d) Account No: s14, c14(c)(d)

If payment is made outside Australia

Swift Code: WPACAU2S

PLEASE QUOTE INVOICE NUMBER IN DESCRIPTION WHEN MAKING PAYMENTS

# PAYMENT ADVICE

To: Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

**Customer** Professor Andrew Parfitt

**Invoice Number** INV-1479

**Amount Due** s14, c14(c)(d)

**Due Date** 10 Nov 2023

**Amount Enclosed**

Enter the amount you are paying above

# TAX INVOICE

Professor Andrew Parfitt  
Vice-Chancellor & President  
University of Technology Sydney  
Building 1  
15 Broadway  
ULTIMO NSW 2000

**Invoice Date**  
13 Oct 2023

**Invoice Number**  
INV-1480

**ABN**  
18 790 253 181

Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

Description	Quantity	Unit Price	GST	Amount AUD
Facilitating and debriefing <span>s14, cl3(a)(b)</span> Leadership Circle feedback process and debrief.	1.00	<span>s14, cl4(c)(d)</span>	10%	<span>s14, cl4(c)(d)</span>
			Subtotal	
			TOTAL GST 10%	
			<b>TOTAL AUD</b>	

**Due Date: 10 Nov 2023**

Banking Details:

Beyond Excellence

BSB: s14, cl4(c)(d) Account No: s14, cl4(c)(d)

If payment is made outside Australia

Swift Code: WPACAU2S

PLEASE QUOTE INVOICE NUMBER IN DESCRIPTION WHEN MAKING PAYMENTS

# PAYMENT ADVICE

To: Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

**Customer** Professor Andrew Parfitt

**Invoice Number** INV-1480

**Amount Due** s14, cl4(c)(d)

**Due Date** 10 Nov 2023

**Amount Enclosed**

Enter the amount you are paying above

**Schedule B Contract to the Master Contractor Agreement**

**Contract**

**Item 1 Date of Master Contractor Agreement**

18 March 2015

**Item 2 Services**

The Contractor will provide the following services and/or deliverables:

	Service/deliverables	Date	Duration
(a)	Negotiation of goals and outcomes for leadership workshop for senior leaders	<b>From</b> Sept 23	<b>To</b> Oct 23
(b)	<p><b>November 2023</b></p> <ul style="list-style-type: none"> <li>• 1 x 2.5 hour High-Impact Leadership masterclass including;                             <ul style="list-style-type: none"> <li>○ Design</li> <li>○ Facilitation</li> <li>○ Debriefing</li> </ul> </li> </ul> <p><b>2024</b></p> <ul style="list-style-type: none"> <li>• Delivery of 1 x 2.5 hour High Impact Leadership Masterclass</li> </ul>	<b>From</b> Sept 23	<b>To</b> Dec 24
	<p>If required:</p> <ul style="list-style-type: none"> <li>• Additional workshops as required/agreed</li> </ul>		
(d)	Reporting mid and end cycle	<b>As agreed</b>	
(e)	Project management and administration	<b>As agreed</b>	

**Item 3 Commencement and Completion Dates**

Estimated Commencement Date: Sept 23

Estimated Completion Date: Dec 24

**Item 4 Services Fees and Reimbursable Expenses**

(a) Services Fees

<p><b>November 2023</b></p> <ul style="list-style-type: none"> <li>• 1 x 2.5 hour High-Impact Leadership masterclass including;                             <ul style="list-style-type: none"> <li>○ Design</li> <li>○ Facilitation</li> <li>○ Debriefing</li> </ul> </li> </ul>	s14, cl4(c)(d) including travel costs (excluding GST)
<p><b>2024</b></p> <ul style="list-style-type: none"> <li>• Delivery of 1 x Masterclass</li> </ul>	s14, cl4(c)(d) including travel costs (excluding GST)
<b>TOTAL</b>	s14, cl4(c)(d) including travel costs (excluding GST)

Each invoice must set out the amount of Services Fees plus any applicable GST.  
Invoice s14, cl4(c)(d)

(b) Reimbursable Expenses

Not applicable.

**Item 5 Date of this Contract**

Date that this Contract has been signed by both parties.

**Item 6 Contractor Details**

Item 7

Contact Name and Title Beyond Excellence Pty Ltd  
Address: Level 40, 140 William Street, Melbourne Vic 3000  
Email: juliebirtles@beyondexcellence.com.au  
Contact number: T: +61 3 9607 8445 M: s14, cl3(a)(b)

UTS Details

Contact Name and Title Mark Cox Executive Director, People and Culture  
Faculty/Unit/Institution: People Unit  
Address: University of Technology Sydney  
PO Box 123  
Ultimo NSW 2007 Australia  
Email: Mark.Cox@uts.edu.au  
Contact number: +61 2 9514 4679  
Alt Contact: Belinda Robinson (Manager Leadership Development and Capability [Belinda.Robinson@uts.edu.au](mailto:Belinda.Robinson@uts.edu.au), +61 2 9514 4395)

The Parties agree to the terms and conditions of this Contract as of date of this Contract, and further agree that this Contract will become part of the Master Contractor Agreement upon execution by the Parties.

Signed for and on behalf of [Beyond Excellence Pty Ltd] by its authorised representative:

s14, cl3(a)(b)

Signature of authorised officer

JULIE BIRTLES

Full name of authorised officer

13.10.2023

Date

Signed for an on behalf of University of Technology Sydney by its authorised representative:

s14, cl3(a)(b)

Signature of authorised officer

MARK COX

Full name of authorised officer

10/10/2023

Date

**From:** [Lisa McNeilly](#) on behalf of [Procurement](#)  
**To:** [Amanda Ander](#)  
**Subject:** RE: Procurement Exemption - Executive Coaching  
**Date:** Monday, 6 November 2023 4:58:35 PM  
**Attachments:** [20231102 Procurement Exemption Julie Birtles - Beyond Excellence.pdf](#)  
[image001.png](#)

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Hi Amanda,

Your exemption has been reviewed and approved.

Kind regards,  
Lisa

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**From:** Amanda Ander <[Amanda.Ander@uts.edu.au](mailto:Amanda.Ander@uts.edu.au)>  
**Sent:** Thursday, November 2, 2023 9:07 AM  
**To:** Procurement <[procurement@uts.edu.au](mailto:procurement@uts.edu.au)>  
**Subject:** Procurement Exemption - Executive Coaching

Hi Procurement

Find attached for processing.

Please reach out if you have any questions.

Regards

**Amanda Ander**  
Executive Support Officer (Internal)

**Office of the Vice-Chancellor**  
University of Technology Sydney  
[Amanda.Ander@uts.edu.au](mailto:Amanda.Ander@uts.edu.au) | +61 2 9514 1302

*I acknowledge the traditional owners of the land on which I live and work and pay my respects to Elders past, present and emerging.*



## PROCUREMENT EXEMPTION APPROVAL \$10K TO \$250K

The purpose of this documents is to seek approval to: undertake a reduced number of quotations, enter into Direct Negotiations, or a Single Source procurement process; and to engage a supplier in order to procure goods/services/capital equipment. This form must be completed and approved prior the supplier being notified of the award and before committing to an agreement. All forms once completed and approved must be sent to [procurement@uts.edu.au](mailto:procurement@uts.edu.au)  
\*It is the responsibility of the requestor to ensure the availability of funds (budget) exists, and prior-approval to commit those funds is secured via delegated authority.

<b>Supplier Name/Service Description</b>	Julie Birtles – Beyond Excellence
<b>Projected spend / Volume(s):</b>	s14, c14(c)(d)
<b>Period to be covered:</b>	2023
<b>Faculty/Business/Department affected:</b>	Vice-Chancellor's Office
<b>Responsible Manager</b>	Andrew Parfitt
<b>Trim Reference</b>	TBC

<p><b>Commercial Justification and recommendation for purchase:</b></p>	<p>Julie Birtles brings a unique set of skills and experience to the Vice-Chancellor's current strategic needs and goals, justifying the use of a standard procurement process.</p> <p>We firmly believe that Julie Birtles is in a unique position to achieve pivotal results through this proposed ~2-month (20 day) period. Through this engagement we expect Julie to enhance the capacity, align mindsets, and foster resilience within the University Leadership Team. This will equip the University's most senior leaders with the sophistication and abilities needed to lead the organisation effectively through ongoing change.</p> <ol style="list-style-type: none"> <li><b>Specialised Expertise:</b> Julie Birtles is a renowned Executive Leadership Coach with a proven track record of success, particularly in working with senior leaders across various sectors, including the university sector. Her expertise is highly specialised, and her previous engagements have demonstrated a deep understanding of the challenges and dynamics unique to UTS.</li> <li><b>Previous Successful Collaboration:</b> Julie has a long history of working with past and the current UTS leadership team., Julie has established a commendable rapport and demonstrated success in understanding of our organisational culture and position, alongside the trust of ULT. This prior success sets the stage for this more targeted scope of works focused on individual leadership development with the Provost and COO, in addition to some further collective leadership development with the Vice-Chancellor and members of the University Leadership Team.</li> <li><b>Alignment with Organisational Goals:</b> This scope of works with Julie represents an expansion of her previous work with the ULT and aligns seamlessly with our ongoing commitment to leadership development and organisational excellence. The expected outcomes and impact measures from this work have been discussed confidentially between Julie and the Vice-Chancellor.</li> <li><b>Trust and Relationship Building:</b> The significance of trust in the coach and coachee is paramount. Julie has a proven ability to build trust over time with the Vice-Chancellor and ULT, which ensures a strong foundation for this impactful coaching engagement.</li> </ol> <p>In light of the above, we believe that Julie Birtles is uniquely positioned to deliver exceptional results that align with our organisational objectives. Granting a procurement exemption in this case will allow us to expedite the engagement process and leverage Julie's expertise for maximum benefit.</p>
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**A Single Source, or Direct Negotiation ('flow-on' work) is required because:**

Yes	No	There are no alternative suppliers for this purchase; and there are no comparable or alternate products which could provide a similar outcome;
Yes	No	Replacement or continuing supply of goods/services is required from this supplier for compatibility to an original supply, or to meet a manufacturer specification/warranty;
Yes	No	Insufficient time has been made available to complete this process in accordance with the UTS Procurement Policy; and a DVC has authorized this exemption to Procurement Policy [as detailed in the attached memo/email]
Yes	No	This purchase is in accordance with the Terms & Conditions of the Grant Funding Agreement, and the proposed supplier is named in the PRO / Project Number [insert]

**I am unable to obtain the mandatory number of quotations in accordance with UTS Policy and Procedures because:**

Yes	No	There are insufficient suppliers in the market in order to obtain the mandatory number of quotations monopoly / oligopoly
Yes	No	Insufficient time has been made available to complete this process in accordance with the UTS Procurement Policy; and a DVC has authorized this exemption to Procurement Policy [as detailed in the attached memo/email]

**Supplier Quotes/Pricing Summary:**

Julie Birtles, Beyond Excellence	s14, c14(c)(d)		
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**DECLARATION OF APPROVER(S):**

• I **Andrew Parfitt** understand my obligations under the **UTS Code of Conduct** in relation to any **Conflict of Interest**, and hereby declare I do not have any professional, personal or family allegiance, bias, inclination, obligation or loyalty which may affect my objectivity, independence or impartiality in approving this procurement. I do not have any personal financial interest in the goods/services being provided, nor to the best of my knowledge do any of my relatives or friends. Further, I warrant that I have not and will not discuss or share any information about this project with persons outside of the official Project Team, other than where such information is already publicly available; and

• I **Andrew Parfitt** confirm I am confident this exemption will yield the best value outcome for UTS. I have verified that:

Yes	No	There are no alternative suppliers for this purchase; and there are no comparable or alternate products which could provide a similar outcome;
Yes	No	There are insufficient suppliers in the market in order to obtain the mandatory number of quotations monopoly / oligopoly
Yes	No	Replacement or continuing supply of goods/services is required from this supplier for compatibility to an original supply, or to meet a manufacturer specification/warranty;
Yes	No	Insufficient time has been made available to complete this process in accordance with the UTS Procurement Policy; and a DVC has authorized this exemption to Procurement Policy <b>[as detailed in the attached memo/email]</b>
Yes	No	This purchase is in accordance with the Terms & Conditions of the Grant Funding Agreement, and the proposed supplier is named in the PRO / Project Number <b>[insert]</b>

Approver Name: **Andrew Parfitt**

Approver Name: .....

Approver Name: .....

Date: **02/11/2023**


Date: .....

Date: .....

Title/Department: **Vice-Chancellor and President**

Title/Department: .....

Title/Department: .....

Signature: **s14, c13(a)(b)**  


Signature: .....

Signature: .....

Document endorsed by CFO FSU: .....

Date: .....

**\*ALL FORMS MUST BE COMPLETED AND SENT TO [procurement@uts.edu.au](mailto:procurement@uts.edu.au) PRIOR TO UNDERTAKING YOUR PURCHASE**

Approval

**A Procurement Process exemption below \$250k is:**

- Where the prerequisite number of quotes cannot/or will not be obtained and exemption is required.

**The following steps are still required:**

- Declaration of Conflict of Interest/Confidentiality
- Commercial justification and recommendation for purchase
- Approval for award
- Notification to any unsuccessful suppliers
- Record all documents and meetings
- Contracts over \$150k Inc. GST are subject to [GIPA](#)

**A Exemption to Process is approved by:**

**Specialist Research Capital Equipment:**

- \$10k to \$50k DOA
- \$50k - \$100k Deans/Directors (Band 3+),
- \$100k - \$250k The Provost

**CAPEX / IT CAPEX:**

- \$10k to \$50k DOA
- \$50k to \$100k Deans/Directors (Band 3+),
- \$100k to \$250k CIO (IT), or Director PMO/FMO

**Goods & Services:**

- \$10k to \$50k DOA
- \$50k - \$100k Deans/Directors (Band 3+), or Strategic Procurement
- \$100k - \$250k Strategic Procurement

**Schedule B Contract to the Master Contractor Agreement****Contract****Item 1 Date of Master Contractor Agreement**

18-Mar-15

**Item 2 Services**

The Contractor will provide the following services and/or deliverables:

	<b>Service/deliverables</b>	<b>Date</b>	<b>Duration</b>
(a)	Negotiation of goals and outcomes for executive coaching in the Faculty of Engineering and Information Technology	<b>From</b> Jan 2024	<b>To</b> Jan 2024
(b)	Six-month engagement.  Coaching is not limited to a set number of hours and is flexible to change in frequency, cadence and duration over the course of the engagement.	<b>From</b> Jan 2024	<b>To</b> August 2024
(c)	This includes initial conversation with Julie Birtles to align TLC development goals and supervisor involvement in coaching.	<b>From</b> Jan 2024	<b>To</b> August 2024
(d)	Reporting mid and end cycle	<b>As agreed</b>	
(e)	Project management and administration	<b>As agreed</b>	

**Item 3 Commencement and Completion Dates**

Estimated Commencement Date: Jan 2024

Estimated Completion Date: August 2024

**Item 4 Services Fees and Reimbursable Expenses**

## (a) Services Fees

The services fees are s14, c14(c)(d) (excluding GST)

Each invoice must set out the amount of Services Fees plus any applicable GST.  
Invoice to be paid s14, c14(c)(d) .

## (b) Reimbursable Expenses

Not applicable.

**Item 5 Date of this Contract**

Date that this Contract has been signed by both parties.

**Item 6 Contractor Details**

Contact Name and Title Ian Banister (Beyond Excellence PTY LTD)  
Address: Level 40, 140 William Street, Melbourne Vic 3000  
Email: ianbanister@beyondexcellence.com.au  
Contact number: s14, c13(a)(b)

**Item 7 UTS Details**

Contact Name and Title Mike Doran, Interim Executive Director, People and Culture  
Faculty/Unit/Institution: People Unit  
Address: PO Box 123 Broadway NSW 2007 Australia  
Email: Mike.Doran@uts.edu.au  
Contact number: +61 2 9514 4679  
Alt Contact: Belinda Robinson (Manager Leadership Development and Capability [Belinda.Robinson@uts.edu.au](mailto:Belinda.Robinson@uts.edu.au), +61 2 9514 4395)

The Parties agree to the terms and conditions of this Contract as of date of this Contract, and further agree that this Contract will become part of the Master Contractor Agreement upon execution by the Parties.

Signed for and on behalf of **[Beyond Excellence  
PTY LTD]** by its authorised representative:

**s14, cl3(a)(b)**



\_\_\_\_\_  
Signature of authorised officer

\_\_\_\_\_  
Full name of authorised officer

\_\_\_\_\_  
Date

Signed for an on behalf of **University of  
Technology Sydney** by its authorised  
representative:

**s14, cl3(a)(b)**



\_\_\_\_\_  
Signature of authorised officer

**MIKE DORAN**

\_\_\_\_\_  
Full name of authorised officer

**18/01/2024**

\_\_\_\_\_  
Date

# TAX INVOICE

Professor Andrew Parfitt  
Vice-Chancellor & President  
University of Technology Sydney  
Building 1  
15 Broadway  
ULTIMO NSW 2000

**Invoice Date**  
25 Jan 2024

**Invoice Number**  
INV-1505

**ABN**  
18 790 253 181

Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

Description	Quantity	Unit Price	GST	Amount AUD
UTS Accelerated Leadership Development 2024	1.00	s14, c14(c)(d)	10%	s14, c14(c)(d)
			Subtotal	
			TOTAL GST 10%	
			<b>TOTAL AUD</b>	

**Due Date: 25 Mar 2024**

Banking Details:

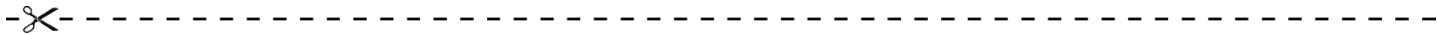
Beyond Excellence

BSB: s14, c14(c)(d) Account No: s14, c14(c)(d)

If payment is made outside Australia

Swift Code: WPACAU2S

PLEASE QUOTE INVOICE NUMBER IN DESCRIPTION WHEN MAKING PAYMENTS



# PAYMENT ADVICE

To: Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

**Customer** Professor Andrew Parfitt  
**Invoice Number** INV-1505  
**Amount Due** s14, c14(c)(d)  
**Due Date** 25 Mar 2024

**Amount Enclosed**

Enter the amount you are paying above

**be** /bi:/ *v. & v.aux.* (*sing. present* **am** /æm, əm/; **are** /a:, ə/; **is** /ɪz/; *pl. present* **are**; *1st and 3rd sing. past* **was** /wɒz, wez/; *2nd sing. past and pl. past* **were** /wɜ:, we/; *present subj.* **be**; *past subj.* **were**; *pres. part.* **being**; *past part.* **been** /bi:n/) • *v.intr.* **1** (often prec. by *there*)

**BE***yondExcellence*

PO Box 194, Hamilton VIC 3300

25<sup>th</sup> January 2024

Professor Andrew Parfitt  
Vice Chancellor and President  
University of Technology Sydney  
Building 1, 15 Broadway  
Ultimo NSW 2007

Dear Andrew,

Thank you for the opportunity to provide a proposal to work with UTS' University Leadership Team (ULT) and senior leaders. The following outlines the scope of work, learning objectives and business terms.

### Strategic Context

The higher education sector continues to be buffeted by systemic forces, and UTS is not immune to this. In an environment shaped by continuing disruption, there is a need for sophisticated leadership to ensure organisational sustainability while protecting research, teaching and learning excellence.

The 2027 strategy was structured in three phases, enabling UTS to adapt and respond to unexpected circumstances. As UTS transitions into the final three years of the 2027 strategy, there is a need for agility, focus, and discipline to advance the right priorities, optimise the operating model, manage risk and grow revenue.

As enterprise leaders, the ULT is pivotal in delivering short-term priorities while enabling the distinctiveness, resilience and performance needed for long-term success. Achieving this requires a unified, aligned, focused ULT equipped to steer UTS through continuous disruption and change.

Building the leadership capability of the ULT and senior leaders centres on focused individual and collective development. The approach outlined is high-impact, creating the enabling conditions to work together to lead organisational-wide change and to shape UTS' evolution and transformation.

## Scope of Work

This engagement spans working with the ULT and senior leaders from across UTS, and includes:

- **Individual leadership development:** with members of the ULT and, where appropriate, their direct reports and other key leaders from across UTS. This will support individuals in strengthening:
  - o the executive confidence and leadership capabilities needed to reimagine, rethink and reframe mindsets, ways of working and outcomes.
  - o the sophisticated communication and influencing skills needed to engage diverse audiences and enable change in a matrix structure.
  - o the multiple intelligences and judgement to embed distributed leadership, a culture of accountability and resilience.
  - o their internal and external networks.
- **Collective leadership development:**

Includes working with:

- o The ULT to strengthen its alignment, trust and impact and the behaviours required to lead UTS through a significant change agenda.
  - o **s14, cl3(a)(b)** to ensure alignment on key priorities, their communication and how they are led to signal and drive change.
  - o The **s14, cl3(a)(b)**, with a particular focus on supporting **s14, cl3(a)(b)** to progress strategic priorities and the change agenda.
  - o Diverse teams from across UTS to enable leadership sophistication, commercial awareness and engagement to advance initiatives, and inspire change, innovation and revenue growth.
- **Revenue Growth:** strengthening senior leaders' entrepreneurial mindset to support innovation, diversification and revenue generation. This extends to connecting members of the ULT and others to my network to facilitate connections, collaborations, and commercial opportunities.

## Learning Objectives and Impact

High-level learning objectives of this engagement include:

- **Enterprise Perspective:** demonstrated ability to take a university-wide view and lead in a networked organisation through an integrative mindset, influence, collaboration and accountability.
- **Executive Leadership:** effectively enable change, manage business operations and facilitate alignment to shape engagement, culture, performance and results.
- **Team Management:** the ability to effectively lead teams, liberate their potential and deliver strategic priorities in response to the dynamic forces shaping UTS' workforce.

- **Commercial Impact:** think critically about commercial objectives, how to frame opportunities and engage diverse stakeholders to foster collaborations, partnerships and revenue growth.
- **Sensemaking and Leading Change:** understand a prototype for catalysing systems change and transformation to lead a significant change agenda.
- **Accelerated development:** creation of development plans to support individual growth and team performance and to identify and advance strategic priorities.

The outlined engagement and learning outcomes will be refined through consultation with s14, cl3(a)(b).

### Engagement Review

A formal review of the engagement and its impact will be conducted in July 2024 and upon its conclusion in December 2024 with s14, cl3(a)(b).

This will be supported by frequent conversations throughout the engagement to track its progress and to respond to emerging themes.

### Business Terms and Timeline

This 11-month engagement comprises 90 consulting days, averaging two days a week. This time will be drawn on as required to align with the leaders and business needs.

Professional fees for 90 consulting days are s14, cl4(c)(d) at the established daily rate of s14, cl4(c)(d). This is a reduction on the standard rate of s14, cl4(c)(d) representing a saving to UTS of s14, cl4(c)(d) which is offered in the spirit of partnership and recognition of the importance of cost management.

Quoted fees are exclusive of GST. Expenses, like flights and accommodation, will be agreed upon and passed on at cost. Other expenses, such as parking, taxis and meals, will be absorbed at no cost to UTS.

I look forward to discussing this proposal with you.

Warm regards,

s14, cl3(a)(b)

Julie Birtles

## Beyond Excellence Philosophy & Credentials

Julie Birtles founded Beyond Excellence Pty Ltd in 2005 to pioneer innovative leadership development and performance approaches. The depth and breadth of the Beyond Excellence team's experience enable us to create unique solutions to our client's needs specifically designed for their circumstances and goals. Clients span the private, public and non-profit sectors, including the top 20 ASX-listed companies, global subsidiaries, professional service firms, universities, entrepreneurs, government departments, and agencies.

At the core of our work is a fascination with the:

- Underlying, and often unrecognised, internal and external systemic influences that shape individual and collective performance
- Critical nature of leadership in creating, shaping and optimising human, cultural and commercial value
- Structural adjustment shaping the fortunes of companies, industries and nations.

The collective impact of these influences is rarely considered in the design of change initiatives. In our experience, success demands more than adjusting business models, cost-cutting and consolidation. It requires new ways of thinking and the ability to navigate increasing complexity, systems change, and risks to create agile, adaptable companies. Our work shapes a new generation of leaders with the skill and confidence to lead in highly complex and uncertain environments.

We have held positions of responsibility within commercial businesses as well as consulting to and advising organisations in the private, public, non-profit, academic and professional service sectors. Our work is underpinned by theories in adult learning, psychology, organisational and social change, entrepreneurship and innovation, as well as current thinking in cognition, how to create conditions for learning agility, leadership maturity and various individual and organisational diagnostic tools and models. We have deep experience and skill in designing and implementing coaching, leadership development and cultural change programs ranging from local to global initiatives. This experience has refined our understanding of the dynamics of change and what is required to sustain success and realise return on investment.

This **MASTER SERVICES AGREEMENT** ("**Agreement**") is made on 01 February 2024 (the "**Commencement Date**") between:

**THE UNIVERSITY OF TECHNOLOGY, SYDNEY (ABN 77 257 686 961)** of 15 Broadway, Ultimo, NSW 2007, Australia ("**UTS**"); and

**BEYOND EXCELLENCE PTY LTD (ABN 18 790 253 181)** of Level 40, William Street, Melbourne Victoria 3000 ("**the Contractor**").

(who shall collectively be known as the "**Parties**")

### **1. Provision of Services**

- 1.1 At UTS' request, the Contractor agrees to provide the specified UTS faculty or business unit the services as set out in a Services Schedule to this Agreement ("**Services**") for the period described (a "**Services Term**") and for the specified fee (the "**Fee**").
- 1.2 The Contractor agrees that UTS is under no obligation to acquire any minimum volume of Services or meet any minimum spend level under this Agreement. The Contractor is not an exclusive provider of Services (nor activities which are the same as or similar to them) to UTS and UTS is not, by executing this Agreement, restricted in any way from engaging another person to provide the same, or similar, services.

### **2. Services Schedules**

- 2.1 One or a number of schedules (each a "**Services Schedule**") may be created under this Agreement for the purpose of specifying the Services to be provided.
- 2.2 This Agreement together with a Services Schedule forms an individual contract as between the Parties (an "**Individual Contract**"). Individual Contracts may operate separately and concurrently. Individual Contracts only become binding when a Services Schedule is signed by an Authorised Representative of both Parties.
- 2.3 The terms of this Agreement are intended to take precedence over any Services Schedule unless there is a clear intention by the Parties to vary the terms of the Agreement in the Services Schedule.

### **3. Contractor's Warranties and Responsibilities**

- 3.1 The Contractor warrants and agrees that he or she:
  - (a) has the necessary training, skills and experience to deliver the Services;
  - (b) will provide the Services in a proper, timely and professional manner and with all due care, skill and diligence to the reasonable satisfaction of UTS;
  - (c) has obtained all licences, permissions and authorisations necessary to provide the Services;
  - (d) is engaged as an independent contractor, and is not an employee, agent or partner of UTS;
  - (e) will pay all taxes, government duties and other such levies payable in respect of any Fee payable; and
  - (f) will act in accordance with the requirements of this Agreement and all relevant laws and regulations and all relevant by-laws, policies, procedures, instruments and directives which UTS may adopt or vary from time to time. As at the date of this Agreement these are published on UTS's website at <https://www.uts.edu.au/about/uts-governance/policies> and <http://www.safetyandwellbeing.uts.edu.au/responsibilities/index.html>. Notwithstanding the foregoing, UTS' policies, procedures, instruments and directives do not form part of this Agreement and are not intended to be contractual in nature and UTS may from time to time, in its absolute discretion, vary or rescind any policies, procedures, instruments and directives.
- 3.2 The Contractor acknowledges that he or she will be subject to:

(a) monitoring, recording and surveillance of all communications carried on or received through UTS's communications and technology systems and all other use of UTS's software, information technology and electronic resources (including but not limited to internet use and email); and

(b) continuous and ongoing camera surveillance whilst on UTS's premises.

#### 4. **Payment for the Services**

4.1 To receive payment for providing the Services, the Contractor must issue UTS with a tax invoice at the times, and in accordance with, the requirements set out in a Services Schedule.

4.2 Each invoice issued by the Contractor must comply with the requirements in the *New Tax System (Goods and Services Tax) Act 1999 (Cth)* and any other laws relating to GST, as amended from time to time.

4.3 UTS will not reimburse any out-of-pocket expenses incurred by the Contractor in the course of providing the Services, unless otherwise specified in a Services Schedule.

4.4 Where the Contractor fails to carry out or properly complete the Services, for whatever reason, UTS may withhold payment of the Fee proportionate to the level of Services not carried out or completed or may, where the Fee has already been paid, direct the Contractor to refund all or part of the Fee (as applicable), in which case the Contractor must refund that amount within 7 days of UTS' direction.

4.5 Subject to clause 4.4, UTS shall pay the Contractor the Fee and any out-of-pocket expenses specified in a Services Schedule within 30 days of receipt of the invoice detailed in clause 4.1.

4.6 The Contractor may not sub-contract or otherwise delegate any part of the Services to a third-party without the prior written consent of UTS. Where UTS grants such consent, the Contractor may only sub-contract the Services (or part thereof) as per the relevant Services Schedule.

#### 5. **Intellectual Property**

5.1 For the purposes of this agreement, "**Intellectual Property**" includes any copyright, designs (as embodied in but not limited to drawings, computer software, solid models and algorithms), patents, patentable ideas, trade mark, semiconductor, circuit layout or plant breeder rights (whether registered, unregistered or applied for), trade, business, company or domain names, know-how, inventions, processes, research materials including biological materials, and Confidential Information (whether in writing or recorded in any form), and any other proprietary, licence or personal rights arising from intellectual activity in the business, industrial, scientific or artistic fields, whether registrable or not, that presently exists or may arise in the future anywhere in Australia or anywhere else in the world.

5.2 All Intellectual Property which is created on or before the date of this Agreement ("**UTS Background Intellectual Property**") and provided to the Contractor to aid in the delivery of the Services remains the property of UTS.

5.3 All Intellectual Property which is discovered, developed or otherwise comes into existence in the course of, or in connection with, the provision of any Services shall vest in UTS on its creation ("**Services Intellectual Property**").

5.4 The Contractor warrants that any Services Intellectual Property supplied by the Contractor for the purpose of providing the Services and its use by UTS does not and will not infringe the Intellectual Property rights of any third-party.

5.5 The Contractor must not use any UTS Background Intellectual Property or any Services Intellectual Property for any purpose other than providing the Services to UTS.

5.6 For the purpose of this clause, "moral rights" means the right of integrity of authorship, right of attribution of authorship and right not to have authorship falsely attributed, as prescribed in the *Copyright Act 1968 (Cth)*. The Contractor hereby consents to and authorises:

- (i) UTS;
- (ii) UTS's licensees and successors in title; and

- (iii) any other person authorised by either (i) or (ii),

to exercise all acts in order to enjoy the full benefit of the Services Intellectual Property which might otherwise amount to an act or omission in breach of the Contractor's moral rights in respect of the Services Intellectual Property.

Further, the Contractor consents to those parties detailed in clause 5.5(i) to (iii), above, to:

- (iv) using UTS Intellectual Property in a manner which does not attribute ownership; and
- (v) doing to UTS Intellectual Property any of the following classes of acts:

update, change, alter, adapt, restructure, redesign, edit, reformat, use for a different purpose, change the colour or texture of, display in a different manner or manipulate digitally or otherwise.

- 5.7 The Contractor must execute all documents and do all things required to give effect to this clause 5.

## 6. Confidentiality

- 6.1 For the purpose of this Agreement, "Confidential Information" means all know-how, financial information and other commercial or research information of a valuable or sensitive nature or Personal Information or Sensitive Information and such other similar information in whatever form and of whatever description that UTS regards as confidential to itself or by its nature should be deemed confidential. It does not include information:

- (a) that is already in the public domain or becomes part of the public domain during the term of this Agreement through no fault of the recipient party; or
- (b) is or becomes available to the recipient party from a third party lawfully in possession of the Confidential Information and who has the lawful power to disclose such information to the recipient party.

- 6.2 The Contractor must take reasonable steps to maintain the confidentiality of the Confidential Information and must not directly or indirectly make use of, copy or disclose to any third-party any Confidential Information otherwise than in the performance of the Services, without UTS' prior written consent or as required by law.

## 7. Personal Information & Privacy

- 7.1 In relation to any 'Personal Information' or 'Sensitive Information' which the Contractor receives during the term of this Agreement, the Contractor agrees to comply with all obligations regarding the collection, use and disclosure of such information imposed on UTS by privacy and health laws including but not limited to the *Privacy Act 1988* (Cth), the *Privacy and Personal Information Protection Act 1998* (NSW), and all privacy policies, procedures instruments and directives which UTS may adopt or vary from time to time, in its absolute discretion. As at the date of this Agreement the relevant policies, procedures instruments and directives are available at <https://www.uts.edu.au/about/uts-governance/policies>. For the purpose of this clause and clause 6 (Confidentiality), "Personal Information" and "Sensitive Information" have the meanings provided in the *Privacy Act 1988* (Cth).

## 8. Indemnity and Liability

- 8.1 The Contractor releases and indemnifies and will keep indemnified UTS and its agents, officers and employees against:
  - (a) all damage, liability, claims, demands, proceedings, actions, and costs (including but not limited to GST and legal fees on a client and solicitor basis and costs of defence or settlement) ("**Loss**") which is related to, arises out of, or is in any way associated with any breach of this Agreement or any Individual Contract or any negligent, wilful or wrongful act or omission of the Contractor in providing Services under this Agreement (including any Individual Contract) or any allegation that the Services or any deliverables provided in connection with the Services defame, infringe the Intellectual Property rights of or breach any duty of confidence owing to any third party;
  - (b) any liability, costs or claims relating to the payment of any Employment Benefits made against UTS by the Contractor and any taxes, levies or costs in relation to those Employment Benefits;

and

- (c) any Loss which is related to, arises out of, or is in any way associated with any obligation on UTS to provide him or her with Employment Benefits.

8.2 For the purpose of this Agreement, "Employment Benefits" means any benefits which employees are ordinarily entitled to at law including, but not limited to, wages, salary, annual leave, personal/carer's leave, leave loading, severance pay, long service leave, superannuation and workers compensation benefits and any taxes related to those benefits including PAYG or payroll taxes.

## 9. Insurance

9.1 In respect of the Contractor's performance of Services, the Contractor agrees to effect and maintain the following insurances:

- (a) Professional indemnity insurance: Limit of indemnity \$1 million. To be maintained for a period of 6 years after the Contractor ceases to provide the Services.

- (b) Public liability insurance: Limit of indemnity \$5 million. To be maintained until the Contractor ceases to provide the Services.

## 10. Term & Termination

10.1 This Agreement commences on the Commencement Date and continues for a period of three (3) years or until the last Individual Contract expires or is otherwise terminated, whichever is later (the "Term").

10.2 Termination of an Individual Contract does not affect any other Individual Contract(s). However, termination of this Agreement will cause each remaining Individual Contract to terminate. This Agreement will also terminate where the last Individual Contract remaining is terminated.

10.3 UTS may terminate this Agreement or an Individual Contract by giving the Contractor not less than 14 days written notice.

10.4 UTS may terminate an Individual Contract or this Agreement immediately by notice in writing to the Contractor, if the Contractor:

- (a) Is in breach of this Agreement or the requirements of an Individual Contract and, if such a breach can be rectified, fails to remedy that breach within a reasonable time period;

- (b) is declared bankrupt, takes advantage of any statute for the relief of bankrupt debtors, enters into a scheme or arrangement with its creditors or commits a criminal offence; or

- (c) does something that in UTS's reasonable opinion would damage its reputation

10.5 The Contractor may terminate an Individual Contract if UTS fails to pay any undisputed invoice issued by the Contractor and does not remedy this within 21 days of receiving written notice to do so.

10.6 The following clauses are intended to survive termination of this Agreement or an Individual Contract: 1, 2, 3, 5, 6, 7, 8, 9, this clause 10 and 11.

## 11. General

11.1 This Agreement constitutes the entire Agreement between the parties for the provision of Services and supersedes all prior oral and/or written commitments between them.

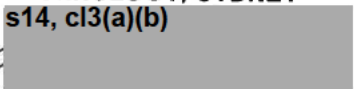
11.2 The Contractor may not assign, sub-contract or delegate his or her duties or obligations under this Agreement or an Individual Contract in whole or part to any third party without the prior written consent of UTS.

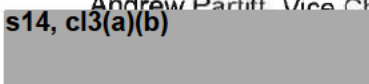
11.3 Should any provision of this Agreement or an Individual Contract be deemed unenforceable the provision will be severed and the remaining clauses shall have full force and effect.

- 11.4 If a party fails to enforce a provision of this Agreement or an Individual Contract this shall not release the parties from their full obligations or rights under this Agreement or an Individual Contract.
- 11.5 The relationship between the parties is that of principal and independent contractor and nothing in this Agreement or an Individual Contract creates an employment relationship, joint venture, partnership, relationship of agency or any other relationship between UTS and the Contractor.
- 11.6 This Agreement or an Individual Contract may only be amended or varied by the written consent of both Parties.
- 11.7 This Agreement and any Individual Contract is governed by the law of the State of New South Wales. The Parties submit to the jurisdiction of the courts of New South Wales and of the Commonwealth of Australia.
- 11.8 This Agreement may be executed in any number of counterparts. All counterparts together will be taken to constitute one instrument.

**EXECUTED** as an Agreement.

SIGNED for and on behalf of the  
**UNIVERSITY OF TECHNOLOGY, SYDNEY**


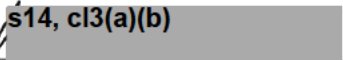
by:   
Andrew Parfitt, Vice Chancellor, and President

  
s14, cl3(a)(b)

(Signature of Witness)

SVAMANTHA SANDFOREN  
(Name of Witness)

SIGNED for and on behalf of the  
**CONTRACTOR**

  
Julie Birtles  
  
s14, cl3(a)(b)

(Signature of Witness)

MICHELLE CAVEN  
(Name of Witness)

## SERVICES SCHEDULE

**DATE:** 01 February 2024

### UTS FACULTY / BUSINESS UNIT

Vice-Chancellor's Office

### SERVICES

This 11-month engagement comprises 90 consulting days, averaging two days a week, delivered through a combination of face-to-face and remote working. This time will be drawn on as required to align with the leaders and business needs.

A formal review of the engagement and its impact will be conducted in July 2024 and upon its conclusion in December 2024 with s14, cl3(a)(b) [REDACTED] [REDACTED] [REDACTED]. This will be supported by frequent conversations throughout the engagement to track its progress and to respond to emerging themes.

This engagement spans working with the ULT and senior leaders from across UTS, and includes:

- Individual leadership development: with members of the ULT and, where appropriate, their direct reports and other key leaders from across UTS. This will support individuals in strengthening:
  - the executive confidence and leadership capabilities needed to reimagine, rethink and reframe mindsets, ways of working and outcomes.
  - the sophisticated communication and influencing skills needed to engage diverse audiences and enable change in a matrix structure.
  - the multiple intelligences and judgement to embed distributed leadership, a culture of accountability and resilience.
  - their internal and external networks.
- Collective leadership development:  
Includes working with:
  - The ULT to strengthen its alignment, trust and impact and the behaviours required to lead UTS through a significant change agenda.
  - s14, cl3(a)(b) [REDACTED] [REDACTED] [REDACTED] to ensure alignment on key priorities, their communication and how they are led to signal and drive change.
  - The s14, cl3(a)(b) [REDACTED] [REDACTED], with a particular focus on supporting s14, cl3(a)(b) [REDACTED] [REDACTED] to progress strategic priorities and the change agenda.
  - Diverse teams from across UTS to enable leadership sophistication, commercial awareness and engagement to advance initiatives, and inspire change, innovation and revenue growth.
- Revenue Growth: strengthening senior leaders' entrepreneurial mindset to support innovation, diversification, and revenue generation. This extends to connecting members of the ULT and others to my network to facilitate connections, collaborations, and commercial opportunities.

#### *Learning Objectives and Impact:*

The Contractor agrees to meet, at a minimum, the below high-level learning objectives when delivering the Services, including:

- Enterprise Perspective: demonstrated ability to take a university-wide view and lead in a networked organisation through an integrative mindset, influence, collaboration and accountability.
- Executive Leadership: effectively enable change, manage business operations and facilitate alignment to shape engagement, culture, performance and results.
- Team Management: the ability to effectively lead teams, liberate their potential and deliver strategic priorities in response to the dynamic forces shaping UTS' workforce.
- Commercial Impact: think critically about commercial objectives, how to frame opportunities and engage diverse stakeholders to foster collaborations, partnerships and revenue growth.
- Sensemaking and Leading Change: understand a prototype for catalysing systems change and transformation to lead a significant change agenda.
- Accelerated development: creation of development plans to support individual ULT growth and team performance and to identify and advance strategic priorities.

The outlined engagement and learning outcomes will be refined through consultation with [redacted] s14, cl3(a)(b)

**SERVICES TERM**

01 February 2024 – 23 December 2024

**CONTRACTOR PERSONNEL**

Julie Birtles will be delivering the Services to UTS.

**FEE**

[redacted] s14, cl4(c)(d) inclusive of GST, for 90 consulting days, at the established daily rate of [redacted] s14, cl4(c)(d)

Other expenses are only payable when pre-approved by UTS and on provision of a valid invoice evidencing the relevant expense.

The Fees are payable by UTS on dates to be agreed in both March and July, as follows:

- March 2024: [redacted] s14, cl4(c)(d) and
- July 2024: [redacted] s14, cl4(c)(d).

with such amounts being inclusive of GST.

**ADDITIONAL TERMS AND CONDITIONS**

Expenses, such as flights and accommodation, will be agreed upon in writing and passed on at cost. Other expenses, such as parking, taxis, and meals, will be covered at no cost to UTS.

**EXECUTED** as an Agreement.

SIGNED for and on behalf of the  
**UNIVERSITY OF TECHNOLOGY, SYDNEY**  
by: [redacted] s14, cl3(a)(b)

Andrew Parfitt, Vice Chancellor, and President

[redacted] s14, cl3(a)(b)

(Signature of Witness)

SANTHANIA SANDFORD  
(Name of Witness)

SIGNED for and on behalf of the  
**CONTRACTOR** by  
[redacted] s14, cl3(a)(b)

Julie Birtles

[redacted] s14, cl3(a)(b)  
(Signature of Witness)

MICHELLE CALLEN  
(Name of Witness)

# TAX INVOICE

James Wallman  
Dean  
Faculty of Science  
University of Technology Sydney  
Building 7  
Level 7  
638 Jones Street  
ULTIMO NSW 2007

**Invoice Date**  
14 Feb 2024

**Invoice Number**  
INV-1500

**ABN**  
18 790 253 181

Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

Description	Quantity	Unit Price	GST	Amount AUD
Design and facilitation of the Science Faculty Leadership Retreat - February 2024	1.00	s14, c14(c)(d)	10%	s14, c14(c)(d)
			Subtotal	
			TOTAL GST 10%	
			<b>TOTAL AUD</b>	

**Due Date: 13 Mar 2024**

Banking Details:

Beyond Excellence

BSB: s14, c14(c)(d) Account No: s14, c14(c)(d)

If payment is made outside Australia

Swift Code: WPACAU2S

PLEASE QUOTE INVOICE NUMBER IN DESCRIPTION WHEN MAKING PAYMENTS

# PAYMENT ADVICE

To: Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

**Customer** James Wallman  
**Invoice Number** INV-1500  
**Amount Due** s14, c14(c)(d)  
**Due Date** 13 Mar 2024

**Amount Enclosed**

Enter the amount you are paying above

# TAX INVOICE

Gina McCluskey  
Leadership Development Coordinator  
People Unit  
University of Technology Sydney  
PO Box 123 Broadway  
SYDNEY NSW 2007

PO 410761  
Rec 485186  
Approved by Belinda Robinson

Invoice Date  
20 Mar 2024

Invoice Number  
INV-1503

Reference  
PO Number: 410761

ABN  
18 790 253 181

Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

Description	Quantity	Unit Price	GST	Amount AUD
6 month coaching engagement for s14, c13(a)(b) from May-October inclusive 2024 delivered by Ian Banister.	1.00	s14, c14(c)(d)	10%	s14, c14(c)(d)
			Subtotal	
			TOTAL GST 10%	
			TOTAL AUD	

Due Date: 19 Apr 2024

Banking Details:

Beyond Excellence

BSB: s14, c14(c)(d) Account No: s14, c14(c)(d)

If payment is made outside Australia

Swift Code: WPACAU2S

PLEASE QUOTE INVOICE NUMBER IN DESCRIPTION WHEN MAKING PAYMENTS

# PAYMENT ADVICE

To: Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

Customer Gina McCluskey

Invoice Number INV-1503

Amount Due s14, c14(c)(d)

Due Date 19 Apr 2024

Amount Enclosed

Enter the amount you are paying above

## PROCUREMENT EXEMPTION RECOMMENDATION OVER \$250,000 SINGLE SOURCE/DIRECT NEGOTIATION

The purpose of this document is to seek approval to undertake a Direct Negotiation, or Single Source process; and to engage a supplier(s) in order to procure goods/services/capital equipment. This form must be completed and approved prior the supplier being notified of the award and before committing to an agreement. All forms once completed and approved must be sent to [procurement@uts.edu.au](mailto:procurement@uts.edu.au)

\*It is the responsibility of the requestor to ensure the availability of funds (budget) exists, and prior-approval to commit those funds is secured via delegated authority.

<b>Supplier Name:</b>	Beyond Excellence (The Trustee for The Thriving Trust) – Julie Birtles	
<b>Goods/Service Description:</b>	ULT executive coaching in areas of individual and collective leadership development, and revenue growth	
<b>Sourcing Spend (ex GST):</b>	<b>Per annum:</b> s14, cl4(c)(d)	<b>Year(s):</b> 2024
<b>Period to be covered (month &amp; year):</b>	<b>From:</b> March 2024	<b>To:</b> December 2024
<b>Faculty, Business, Department Affected:</b>	Vice-Chancellor's Office, Provost & Senior VP's Office, COO – Operations Division	
<b>Specific Service Level Requirements:</b>	Formal review of the engagement impact in July and in December 2024	
<b>Constraints:</b>	Scope details to be form in consultation with the supplier; Dependency on previous engagement continuity	
<b>Business case / Approved funding:</b>	Funded from the VC Office	
<b>Responsible Manager:</b>	Michelle Callen, Director, Strategy and Planning, Vice-Chancellor's Office	
<b>Trim Reference:</b>	UR2023/1735	

### Commercial Justification and recommendation for purchase:

Engagement of Julie Birtles from Beyond Excellence to provide continuing services to the ULT at UTS, derives from the following considerations.

- Established trust and built relationship with UTS ULT
- Specialised service offering combining individual, collective and revenue growth executive level coaching
- Continuity of existing services
- Learning & Development providers panel enabling direct engagement of panel supplier/s under review (TBC Q4 2024)
- Demonstrated Value for Money and Demonstrated Return on Investment (based on historic engagement comparison), outlined below

### A Single Source, or Direct Negotiation is required because:

<b>Yes</b>	<b>No</b>	Replacement or continuing supply of goods/services is required from this supplier for compatibility to an original supply, or to meet a manufacturer specification/warranty; The continuity also results in cost avoidance linked to alternative supplier onboarding/forming phase of engagement. Value for Money principle has also been achieved and demonstrated.
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**Recommendation and Benefit Summary:**

The Recommendation is to award to Beyond Excellence based on the reasons defined below.

- Offered [redacted] discount (daily rates s14, cl4(c)(d) x 90 days = s14, cl4(c)(d) i.e. [redacted] discount
- Cost saving of [redacted] on 90 days engagement against the UTS average paid daily rates in '21 - '23 – see table below
- Further cost avoidance achieved by continuation of services with an established and entrusted supplier – i.e. expedited delivery – time/cost consideration)
- This solution combined several types of coaching and development that is otherwise delivered by separate specialised suppliers.
- Based on historic engagement, the ROI deriving from this contract is calculated as:

Exec Coaching Provider	UTS Engagement Level	Approx Hourly Rate ('21 - '23)	Approx. Daily rates ('21 - '23)
s14, cl4(c)(d)	ULT	s14, cl4(c)(d)	[redacted]
	ULT		
	ULT		
Beyond Excellence	HoS		
Beyond Excellence	ULT		
s14, cl4(c)(d)	ULT	[redacted]	[redacted]
	ULT		
	ULT		
	Director		
	ULT		
	HoS		
	Director		
	HoS		
	HoS		
<b>Average</b>			

**Contract Details and Contract Management**

Provide full details:

- Confirm a UTS Legal Services contract template and advice was sought, if other provide details – UTS service contract will be used
- Length of proposed contract, including any formal extension options – one-off engagement for 2024. Future engagement under the upcoming L&D Providers Panel
- Any relevant departures or risks from UTS Terms and Conditions that are material and worth noting – N/A UTS T&C's
- UTS person who will manage supplier performance and contractual obligations during the term of the contract – Michelle Callen, Director, Strategy and Planning, Vice-Chancellor's Office

**I understand the below process must be completed if this Recommendation is approved:**

Completion of Register of Contracts – <a href="#">GIPA</a>	Mandatory
--	-----------

**DECLARATION OF THE RESPONSIBLE MANAGER(S):**

- I understand my obligations under the UTS Code of Conduct in relation to any Conflict of Interest, and hereby declare I do not have any professional, personal or family allegiance, bias, inclination, obligation or loyalty which may affect my objectivity, independence or impartiality in approving this procurement. I do not have any personal financial interest in the goods/services being provided, nor to the best of my knowledge do any of my relatives or friends. Further, I warrant that I have not and will not discuss or share any information about this project with persons outside of the official Project Team, other than where such information is already publicly available; and
- I am confident this exemption will yield the best value outcome for UTS. I have verified that

Yes	No	There are no alternative suppliers for this purchase; and there are no comparable or alternate products which could provide a similar outcome;
Yes	No	Replacement or continuing supply of goods/services is required from this supplier for compatibility to an original supply, or to meet a manufacturer specification/warranty;
Yes	No	Insufficient time has been made available to complete this process in accordance with the UTS Procurement Policy; and a DVC has authorized this exemption to Procurement Policy <u>[as detailed in the attached memo/email]</u>
Yes	No	This purchase is in accordance with the Terms & Conditions of the Grant Funding Agreement, and the proposed supplier is named in the PRO / Project Number <u>[insert]</u>

**Submitted by:**  
Michelle Callen

**Endorsed by:**  
Steve Livett

**Approver Name:**  
Belinda Johnson

**Approver Name:**  
Glen Babington

**Date:**  
21/03/2024

**Date:**  
**Title/Department:**  
Sr Procurement Consultant/Procurement

**Date:**  
21 March 2024  
**Title/Department:**  
CFO/Finance

**Date:**  
23 Mar 24  
**Title/Department:**  
COO/Operations

**Signature:**  
s14, c13(a)(b)

**Signature:**  
s14, c13(a)(b)

**Signature:**  
s14, c13(a)(b)

**\*ALL FORMS MUST BE COMPLETED AND SENT TO [procurement@uts.edu.au](mailto:procurement@uts.edu.au) PRIOR TO UNDERTAKING YOUR PURCHASE**

**Approval**

**A Procurement Process exemption over \$250k is:**

- Where a full public tender is not completed,

**The following completed documents are still required:**

- Declaration of Conflict of Interest/Confidentiality
- Approval for award
- Record all documents and meetings
- Approval of this form
- Financial delegation - [here](#)

**A Exemption to Process is approved by:**

**Specialist Research Capital Equipment:**

- \$250k - \$1m Provost, and DVC Research
- \$1m+ Research Procurement Committee, and VC

**CAPEX / IT CAPEX:**

- \$50k to \$2m COO
- \$2m+ VC

**Goods & Services:**

- \$250k to \$1m CFO FSU, and COO
- \$1m+ VC

# TAX INVOICE

Professor Andrew Parfitt  
Vice-Chancellor & President  
University of Technology Sydney  
Building 1  
15 Broadway  
ULTIMO NSW 2000

**Invoice Date**  
1 May 2024  
**Invoice Number**  
INV-1508  
**ABN**  
18 790 253 181

Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

Description	Quantity	Unit Price	GST	Amount AUD
UTS Accelerated Leadership Development 2024	1.00	s14, c14(c)(d)	10%	s14, c14(c)(d)
			Subtotal	
			TOTAL GST 10%	
			<b>TOTAL AUD</b>	

## Due Date: 2 May 2024

### Banking Details:

Beyond Excellence

BSB: s14, c14(c)(d) Account No: s14, c14(c)(d)

If payment is made outside Australia

Swift Code: WPACAU2S

PLEASE QUOTE INVOICE NUMBER IN DESCRIPTION WHEN MAKING PAYMENTS

# PAYMENT ADVICE

To: Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

**Customer** Professor Andrew Parfitt  
**Invoice Number** INV-1508  
**Amount Due** s14, c14(c)(d)  
**Due Date** 2 May 2024  
**Amount Enclosed**

Enter the amount you are paying above

# TAX INVOICE

Professor Andrew Parfitt  
Vice-Chancellor & President  
University of Technology Sydney  
Building 1  
15 Broadway  
ULTIMO NSW 2000

**Invoice Date**  
3 Jun 2024

**Invoice Number**  
INV-1510

**ABN**  
18 790 253 181

Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

Description	Quantity	Unit Price	GST	Amount AUD
UTS Accelerated Leadership Development 2024	1.00	s14, c14(c)(d)	10%	s14, c14(c)(d)
			Subtotal	
			TOTAL GST 10%	
			<b>TOTAL AUD</b>	

## Due Date: 3 Jul 2024

Banking Details:

Beyond Excellence

BSB: s14, c14(c)(d) Account No: s14, c14(c)(d)

If payment is made outside Australia

Swift Code: WPACAU2S

PLEASE QUOTE INVOICE NUMBER IN DESCRIPTION WHEN MAKING PAYMENTS

# PAYMENT ADVICE

To: Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

**Customer** Professor Andrew Parfitt  
**Invoice Number** INV-1510  
**Amount Due** s14, c14(c)(d)  
**Due Date** 3 Jul 2024

**Amount Enclosed**

Enter the amount you are paying above

# TAX INVOICE

Professor Andrew Parfitt  
Vice-Chancellor & President  
University of Technology Sydney  
Building 1  
15 Broadway  
ULTIMO NSW 2000

**Invoice Date**  
11 Oct 2024

**Invoice Number**  
INV-1524

**ABN**  
18 790 253 181

Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

Description	Quantity	Unit Price	GST	Amount AUD
Consulting Services - Accelerated Leadership Development	1.00	s14, c14(c)(d)	10%	s14, c14(c)(d)
			Subtotal	
			TOTAL GST 10%	
			<b>TOTAL AUD</b>	

**Due Date: 11 Oct 2024**

Banking Details:

Beyond Excellence

BSB: s14, c14(c)(d) Account No: s14, c14(c)(d)

If payment is made outside Australia

Swift Code: WPACAU2S

PLEASE QUOTE INVOICE NUMBER IN DESCRIPTION WHEN MAKING PAYMENTS

# PAYMENT ADVICE

To: Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

**Customer** Professor Andrew Parfitt  
**Invoice Number** INV-1524  
**Amount Due** s14, c14(c)(d)  
**Due Date** 11 Oct 2024

**Amount Enclosed**

Enter the amount you are paying above

# TAX INVOICE

Professor Andrew Parfitt  
Vice-Chancellor & President  
University of Technology Sydney  
Building 1  
15 Broadway  
ULTIMO NSW 2000

**Invoice Date**  
24 Oct 2024

**Invoice Number**  
INV-1525

**ABN**  
18 790 253 181

Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

Description	Quantity	Unit Price	GST	Amount AUD
Consulting Services - Accelerated Leadership Development (November-December 2024)	1.00	s14, c14(c)(d)	10%	s14, c14(c)(d)
			Subtotal	
			TOTAL GST 10%	
			<b>TOTAL AUD</b>	

## Due Date: 24 Oct 2024

Banking Details:

Beyond Excellence

BSB: s14, c14(c)(d) Account No: s14, c14(c)(d)

If payment is made outside Australia

Swift Code: WPACAU2S

PLEASE QUOTE INVOICE NUMBER IN DESCRIPTION WHEN MAKING PAYMENTS

# PAYMENT ADVICE

To: Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

**Customer** Professor Andrew Parfitt  
**Invoice Number** INV-1525  
**Amount Due** s14, c14(c)(d)  
**Due Date** 24 Oct 2024

**Amount Enclosed**

Enter the amount you are paying above

# TAX INVOICE

Professor Andrew Parfitt  
Vice-Chancellor & President  
University of Technology Sydney  
Building 1  
15 Broadway  
ULTIMO NSW 2000

**Invoice Date**  
1 Jan 2025

**Invoice Number**  
INV-1540

**ABN**  
18 790 253 181

Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

Description	Quantity	Unit Price	GST	Amount AUD
Executive Coaching (February-July 2025)	1.00	s14, c14(c)(d)	10%	s14, c14(c)(d)
			Subtotal	
			TOTAL GST 10%	
			<b>TOTAL AUD</b>	

## Due Date: 31 Jan 2025

Banking Details:

Beyond Excellence

BSB: s14, c14(c)(d) Account No: s14, c14(c)(d)

If payment is made outside Australia

Swift Code: WPACAU2S

PLEASE QUOTE INVOICE NUMBER IN DESCRIPTION WHEN MAKING PAYMENTS

# PAYMENT ADVICE

To: Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

**Customer** Professor Andrew Parfitt  
**Invoice Number** INV-1540  
**Amount Due** s14, c14(c)(d)  
**Due Date** 31 Jan 2025

**Amount Enclosed**

Enter the amount you are paying above

PO#428415  
Rec#514515  
Approved by Belinda Robinson  
10/02/2025



# TAX INVOICE

Belinda Robinson  
Manager Leadership Development and Capability  
University of Technology Sydney  
Level 23  
Building 1  
15 Broadway  
ULTIMO NSW 2007

Invoice Date  
31 Jan 2025

Invoice Number  
INV-1530

Reference  
PO428415

ABN  
18 790 253 181

Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

Description	Quantity	Unit Price	GST	Amount AUD
6-month coaching engagement with (February-July 2025)	1.00		10%	
			Subtotal	
			TOTAL GST 10%	
			TOTAL AUD	

Due Date: 28 Feb 2025

Banking Details:

Beyond Excellence

BSB: Account No:

If payment is made outside Australia

Swift Code: WPACAU2S

PLEASE QUOTE INVOICE NUMBER IN DESCRIPTION WHEN MAKING PAYMENTS



# PAYMENT ADVICE

Customer Belinda Robinson

Invoice Number INV-1530

Amount Due

Due Date 28 Feb 2025

Amount Enclosed

Enter the amount you are paying above

To: Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

# TAX INVOICE

Professor Andrew Parfitt  
Vice-Chancellor & President  
University of Technology Sydney  
Building 1  
15 Broadway  
ULTIMO NSW 2000

**Invoice Date**  
3 Feb 2025

**Invoice Number**  
INV-1539

**ABN**  
18 790 253 181

Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

Description	Quantity	Unit Price	GST	Amount AUD
UTS Accelerated Leadership Development 2025	1.00	s14, c14(c)(d)	10%	s14, c14(c)(d)
			Subtotal	
			TOTAL GST 10%	
			<b>TOTAL AUD</b>	

## Due Date: 5 Mar 2025

Banking Details:

Beyond Excellence

BSB: s14, c14(c)(d) Account No: s14, c14(c)(d)

If payment is made outside Australia

Swift Code: WPACAU2S

PLEASE QUOTE INVOICE NUMBER IN DESCRIPTION WHEN MAKING PAYMENTS

# PAYMENT ADVICE

To: Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

**Customer** Professor Andrew Parfitt  
**Invoice Number** INV-1539  
**Amount Due** s14, c14(c)(d)  
**Due Date** 5 Mar 2025

**Amount Enclosed**

Enter the amount you are paying above

# TAX INVOICE

James Wallman  
Dean  
Faculty of Science  
University of Technology Sydney  
Building 7  
Level 7  
638 Jones Street  
ULTIMO NSW 2007

**Invoice Date**  
4 Mar 2025

**Invoice Number**  
INV-1543

**ABN**  
18 790 253 181

Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

Description	Quantity	Unit Price	GST	Amount AUD
Design and facilitation of the Science Faculty Leadership Retreat - February 2025	1.00	s14, c14(c)(d)	10%	s14, c14(c)(d)
			Subtotal	
			TOTAL GST 10%	
			<b>TOTAL AUD</b>	

## Due Date: 3 Apr 2025

Banking Details:

Beyond Excellence

BSB: s14, c14(c)(d) Account No: s14, c14(c)(d)

If payment is made outside Australia

Swift Code: WPACAU2S

PLEASE QUOTE INVOICE NUMBER IN DESCRIPTION WHEN MAKING PAYMENTS

# PAYMENT ADVICE

To: Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

**Customer** James Wallman  
**Invoice Number** INV-1543  
**Amount Due** s14, c14(c)(d)  
**Due Date** 3 Apr 2025

**Amount Enclosed**

Enter the amount you are paying above

# TAX INVOICE

Professor Andrew Parfitt  
Vice-Chancellor & President  
University of Technology Sydney  
Building 1  
15 Broadway  
ULTIMO NSW 2000

**Invoice Date**  
15 May 2025

**Invoice Number**  
INV-1560

**ABN**  
18 790 253 181

Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

Description	Quantity	Unit Price	GST	Amount AUD
UTS Accelerated Leadership Development 2025	1.00	s14, c14(c)(d)	10%	s14, c14(c)(d)
			Subtotal	
			TOTAL GST 10%	
			<b>TOTAL AUD</b>	

## Due Date: 12 Jun 2025

Banking Details:

Beyond Excellence

BSB: s14, c14(c)(d) Account No: s14, c14(c)(d)

If payment is made outside Australia

Swift Code: WPACAU2S

PLEASE QUOTE INVOICE NUMBER IN DESCRIPTION WHEN MAKING PAYMENTS

# PAYMENT ADVICE

To: Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

**Customer** Professor Andrew Parfitt  
**Invoice Number** INV-1560  
**Amount Due** s14, c14(c)(d)  
**Due Date** 12 Jun 2025

**Amount Enclosed**

Enter the amount you are paying above

## PROCUREMENT EXEMPTION RECOMMENDATION OVER \$250,000 SINGLE SOURCE/DIRECT NEGOTIATION [Delete the type or request that is not applicable]

The purpose of this document is to seek approval to undertake a Direct Negotiation, or Single Source process; and to engage a supplier(s) in order to procure goods/services/capital equipment. This form must be completed and approved prior the supplier being notified of the award and before committing to an agreement. All forms once completed and approved must be sent to [procurement@uts.edu.au](mailto:procurement@uts.edu.au)  
\*It is the responsibility of the requestor to ensure the availability of funds (budget) exists, and prior-approval to commit those funds is secured via delegated authority.

<b>Supplier Name:</b>	Beyond Excellence (The Trustee for the Thriving Trust) – Julie Birtles	
<b>Goods/Service Description:</b>	ULT executive coaching in areas of individual and collective leadership development.	
<b>Sourcing Spend (ex GST):</b>	<b>Per annum:</b> s14, cl4(c)(d)	<b>Year(s):</b> 2025
<b>Period to be covered (month &amp; year):</b>	<b>From:</b> 1.1.2025	<b>To:</b> 31.12.2025
<b>Faculty, Business, Department Affected:</b>	Vice-Chancellor's Office	
<b>Specific Service Level Requirements:</b>	UTS Accelerated Leadership Development 2025	
<b>Constraints:</b>	Scope details to be form in consultation with the supplier; Dependency on previous engagement continuity	
<b>Business case / Approved funding:</b>	Funded from the VC Office	
<b>Responsible Manager:</b>	Michelle Callen, Chief of Staff	
<b>Trim Reference:</b>	UR25/124	
<p><b>Commercial Justification and recommendation for purchase:</b> Engagement of Julie Birtles from Beyond Excellence to provide continuing services to the ULT at UTS, derives from the following considerations.</p> <ul style="list-style-type: none"> <li>- Established trust and built relationship with UTS ULT</li> <li>- Specialised service offering combining individual, collective and revenue growth executive level coaching</li> <li>- Continuity of existing services</li> <li>- Learning &amp; Development providers panel enabling direct engagement of panel supplier/s under review (TBC Q4 2024)</li> </ul> <p>Demonstrated Value for Money and Demonstrated Return on Investment (based on historic engagement comparison), outlined below.</p>		
<p><b>A Single Source, or Direct Negotiation is required because:</b> <small>[Delete the type or request that is not applicable]</small></p>		
Yes	No	There are no alternative suppliers for this purchase; and there are no comparable or alternate products which could provide a similar outcome;
Yes	No	Replacement or continuing supply of goods/services is required from this supplier for compatibility to an original supply, or to meet a manufacturer specification/warranty;

Yes	No	Insufficient time has been made available to complete this process in accordance with the UTS Procurement Policy [as detailed in the attached memo/email] . [redacted] has authorized this exemption to Procurement Policy [as detailed in the attached memo/email]
Yes	No	This purchase is in accordance with the Terms & Conditions of the Grant Funding Agreement, and the proposed supplier is named in the agreement [attach copy of agreement]

**Recommendation and Benefit Summary:**

[The Procurement Recommendation must describe the rationale for a Procurement Exemption; and the process undertaken to negotiate with the supplier, and demonstrate value from a non-standard approach]

The Recommendation is to award to [insert supplier name] based on the reasons defined below.

[replace examples as appropriate]

- Further cost avoidance achieved by continuation of services with an established and entrusted supplier – i.e. expedited delivery – time/cost consideration)
- This solution combined several types of coaching and development that is otherwise delivered by separate specialised suppliers.
- Based on historic engagement, the ROI deriving from this contract is calculated as:

Exec Coaching Provider	UTS Engagement Level	Approx Hourly Rate ('21 - '23)	Approx. Daily rates ('21 - '23)
s14, c14(c)(d)	ULT	s14, c14(c)(d)	
	ULT		
	ULT		
Beyond Excellence	HoS		
Beyond Excellence	ULT		
s14, c14(c)(d)	ULT		
	ULT		
	ULT		
	Director		
	ULT		
	HoS		
	Director		
	HoS		
	HoS		
<b>Average</b>			

**Contract Details and Contract Management**

Provide full details:

- Confirm a UTS Legal Services contract template and advice was sought, if other provide details – UTS Service Contract will be used.
- Length of proposed contract, including any formal extension options – one off engagement for 2025.
- Any relevant departures or risks from UTS Terms and Conditions that are material and worth noting – N/A UTS T&C's
- UTS person who will manage supplier performance and contractual obligations during the term of the contract – Michelle Callen, Chief of Staff.

**I understand the below process must be completed if this Recommendation is approved:**

**DECLARATION OF THE RESPONSIBLE MANAGER(S):**

- I understand my obligations under the [UTS Code of Conduct](#) in relation to any [Conflict of Interest](#), and hereby declare I do not have any professional, personal or family allegiance, bias, inclination, obligation or loyalty which may affect my objectivity, independence or impartiality in approving this procurement. I do not have any personal financial interest in the goods/services being provided, nor to the best of my knowledge do any of my relatives or friends. Further, I warrant that I have not and will not discuss or share any information about this project with persons outside of the official Project Team, other than where such information is already publicly available; and
- I am confident this exemption will yield the best value outcome for UTS. I have verified that

Yes	No	There are no alternative suppliers for this purchase; and there are no comparable or alternate products which could provide a similar outcome;
Yes	No	Replacement or continuing supply of goods/services is required from this supplier for compatibility to an original supply, or to meet a manufacturer specification/warranty;
Yes	No	Insufficient time has been made available to complete this process in accordance with the UTS Procurement Policy; and a DVC has authorized this exemption to Procurement Policy <a href="#">[as detailed in the attached memo/email]</a>
Yes	No	This purchase is in accordance with the Terms & Conditions of the Grant Funding Agreement, and the proposed supplier is named in the PRO / Project Number <a href="#">[insert]</a>

Approver Name: Michelle Callen, Chief of Staff

Approver Name: Belinda Johnson, CFO

Approver Name: Glen Babington COO

Date: 23/06/25

Date: 24/6/2025

Date: 26 June 2025

Title/Department: Chief of Staff

Title/Department: CFO, Finance Unit

Title/Department: COO/Ops Div

Signature: *shh*  
s14, c13(a)(b)

Signature: s14, c13(a)(b)

Signature: s14, c13(a)(b)

**\*ALL FORMS MUST BE COMPLETED AND SENT TO [procurement@uts.edu.au](mailto:procurement@uts.edu.au) PRIOR TO UNDERTAKING YOUR PURCHASE**

**Approval**

A Procurement Process exemption over \$250k is:

- Where a full public tender is not completed,

The following completed documents are still required:

- Declaration of Conflict of Interest/Confidentiality
- Approval for award
- Record all documents and meetings
- Approval of this form
- Financial delegation - [here](#)

A Exemption to Process is approved by:

**Specialist Research Capital Equipment:**

- 1 250k - \$1m CFO and Provost
- 2 \$1m+ VC

**CAPEX / IT CAPEX:**

- 3 \$250 to \$2m CFO and COO
- > \$2m+ VC

**Goods & Services:**

- 4 \$250k to \$1m CFO and COO
- > \$1m+ VC

Completion of Register of Contracts – [GIPA](#)

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# TAX INVOICE

Professor Andrew Parfitt  
Vice-Chancellor & President  
University of Technology Sydney  
Building 1  
15 Broadway  
ULTIMO NSW 2000

**Invoice Date**  
16 Dec 2025

**Invoice Number**  
INV-1585

**ABN**  
18 790 253 181

Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

Description	Quantity	Unit Price	GST	Amount AUD
Coaching with s14, c13(a)(b)	1.00	s14, c14(c)(d)	10%	s14, c14(c)(d)
			Subtotal	
			TOTAL GST 10%	
			<b>TOTAL AUD</b>	

## Due Date: 13 Jan 2026

Banking Details:

Beyond Excellence

BSB: s14, c14(c)(d) Account No: s14, c14(c)(d)

If payment is made outside Australia

Swift Code: WPACAU2S

PLEASE QUOTE INVOICE NUMBER IN DESCRIPTION WHEN MAKING PAYMENTS

# PAYMENT ADVICE

To: Thriving Trust  
Attention: Julie Birtles  
PO Box 194  
HAMILTON VIC 3300  
AUSTRALIA

**Customer** Professor Andrew Parfitt  
**Invoice Number** INV-1585  
**Amount Due** s14, c14(c)(d)  
**Due Date** 13 Jan 2026

**Amount Enclosed**

Enter the amount you are paying above

## Consolidated travel and expenses - Beyond Excellence - 1/1/2022 to 11/2/2026

Booking Type	Request Name	Request ID	Purchased Date	City	Start Date	End Date	Approved Amount (AUD)
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	6NXR	15/07/2022	Melbourne->Sydney Sydney->Melbourne	3/08/2022	5/08/2022	972.78
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	6NXR	15/07/2022	->	3/08/2022	5/08/2022	580
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	6PLF	11/08/2022	Melbourne->Sydney Sydney->Melbourne	18/08/2022	18/08/2022	972.78
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	6QGX	13/09/2022	Melbourne->Sydney Sydney->Melbourne	26/09/2022	26/09/2022	1,064.16
Air Ticket	Trip from Melbourne Airport, Melbourne,	6RC4	7/10/2022	Melbourne->Sydney Sydney->Melbourne	7/11/2022	9/11/2022	1,028.2
Hotel Reservation	Trip from Melbourne Airport, Melbourne,	6RC4	6/10/2022	->	7/11/2022	9/11/2022	580
Hotel Reservation	Hotel Reservation at 15 BROADWAY, ULTIMO	9D9C	11/05/2023	->Sydney	30/05/2023	31/05/2023	259
Air Ticket	Julie Birtles (BEyond Excellence) Trip f	9HLJ	22/08/2023	Melbourne->Sydney Sydney->Melbourne	24/08/2023	25/08/2023	726.44
Hotel Reservation	Julie Birtles (BEyond Excellence) Trip f	9HLJ	13/08/2023	->	24/08/2023	25/08/2023	250
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9HLK	4/09/2023	Melbourne->Sydney Sydney->Melbourne	10/09/2023	11/09/2023	726.44
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	9HLK		->	10/09/2023	11/09/2023	250
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9JCX	4/09/2023	Melbourne->Sydney Sydney->Melbourne	24/09/2023	29/09/2023	719.93
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	9JCX	3/09/2023	->	24/09/2023	29/09/2023	1,250
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9KQW	6/10/2023	Melbourne->Sydney Sydney->Melbourne	12/10/2023	13/10/2023	719.93
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	9KQW	5/10/2023	->	12/10/2023	13/10/2023	259
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9LCD	23/10/2023	Melbourne->Sydney Sydney->Melbourne	24/10/2023	26/10/2023	1,086.78
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	9LCD	19/10/2023	->	24/10/2023	26/10/2023	500
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9LLR	27/10/2023	Melbourne->Sydney Sydney->Melbourne	30/10/2023	31/10/2023	1,117.64
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	9LLR	27/10/2023	->	30/10/2023	31/10/2023	250
Air Ticket	Trip from Melbourne Airport, Melbourne,	9LV4	3/11/2023	Melbourne->Sydney Sydney->Melbourne	7/11/2023	9/11/2023	1,117.64
Hotel Reservation	Trip from Melbourne Airport, Melbourne,	9LV4	2/11/2023	->	7/11/2023	9/11/2023	2,178
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9M4G	9/11/2023	Melbourne->Sydney Sydney->Melbourne	13/11/2023	15/11/2023	1,117.64
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	9M4G		->Ultimo	13/11/2023	15/11/2023	539
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9MFF	15/11/2023	Melbourne->Sydney Sydney->Melbourne	21/11/2023	23/11/2023	1,117.64
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	9MFF	14/11/2023	->	21/11/2023	23/11/2023	580
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9MLX	22/11/2023	Melbourne->Sydney Sydney->Melbourne	28/11/2023	1/12/2023	1,117.64
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	9MLX	21/11/2023	->	28/11/2023	1/12/2023	870
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9MLY	22/11/2023	Melbourne->Sydney Sydney->Melbourne	5/12/2023	8/12/2023	1,117.64
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	9MLY	21/11/2023	->	5/12/2023	8/12/2023	870
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9MXD	4/12/2023	Melbourne->Sydney Sydney->Melbourne	10/12/2023	15/12/2023	1,117.64
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	9MXD	3/12/2023	->	10/12/2023	15/12/2023	1,239
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9MXR	5/12/2023	Melbourne->Sydney Sydney->Melbourne	17/12/2023	19/12/2023	1,117.64
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	9MXR	4/12/2023	->	17/12/2023	19/12/2023	498
Hotel Reservation	Hotel Reservation at CHIPPENDALE NSW 200	9NRV	21/01/2024	->	24/01/2024	25/01/2024	239
Air Ticket	Trip from Sydney to Melbourne (For Ms Ju	9PGH	8/02/2024	Sydney->Melbourne	13/02/2024	16/02/2024	572.05
Hotel Reservation	Trip from Sydney to Melbourne (For Ms Ju	9PGH	8/02/2024	->	13/02/2024	16/02/2024	1,383
Air Ticket	Trip from Sydney to Canberra (For Miss M	9PH4	9/02/2024	Sydney->Canberra Canberra->Sydney	26/02/2024	28/02/2024	734.92
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9PVN	23/02/2024	Melbourne->Sydney Sydney->Melbourne	29/02/2024	1/03/2024	1,144.1
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	9PVN	22/02/2024	->	29/02/2024	1/03/2024	265
Air Ticket	Trip from Melbourne to Sydney (For Mrs J	9Q6Y	29/02/2024	Melbourne->Sydney Sydney->Melbourne	4/03/2024	6/03/2024	949.35
Hotel Reservation	Trip from Melbourne to Sydney (For Mrs J	9Q6Y	28/02/2024	->	4/03/2024	6/03/2024	788
Air Ticket	Trip from Sydney to Melbourne (For Ms Ju	9QFD	5/03/2024	Sydney->Melbourne	13/03/2024	14/03/2024	572.05
Hotel Reservation	Trip from Sydney to Melbourne (For Ms Ju	9QFD	4/03/2024	->	13/03/2024	14/03/2024	285

## Consolidated travel and expenses - Beyond Excellence - 1/1/2022 to 11/2/2026

Booking Type	Request Name	Request ID	Purchased Date	City	Start Date	End Date	Approved Amount (AUD)
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9QQR	14/03/2024	Melbourne->Sydney Sydney->Melbourne	18/03/2024	19/03/2024	1,176.7
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	9QQR	13/03/2024	->	18/03/2024	19/03/2024	265
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9QQM	14/03/2024	Melbourne->Sydney Sydney->Melbourne	20/03/2024	20/03/2024	1,201.34
Air Ticket	Julie Birtles	9QW3		Melbourne->Sydney Sydney->Melbourne	25/03/2024	27/03/2024	450
Air Ticket	Julie Birtles	9QW3		Melbourne->Sydney Sydney->Melbourne	25/03/2024	27/03/2024	450
Hotel Reservation	Hotel Reservation at SYDNEY NSW, AUSTRAL	9QVV	17/03/2024	->	25/03/2024	27/03/2024	530
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9QR6	14/03/2024	Melbourne->Sydney	7/04/2024	7/04/2024	588.35
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9QVW	18/03/2024	Melbourne->Sydney Sydney->Melbourne	22/04/2024	25/04/2024	1,176.7
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	9QVW	17/03/2024	->	22/04/2024	25/04/2024	795
Air Ticket	Trip from Melbourne to Sydney (For Mrs J	9T6R	23/04/2024	Melbourne->Sydney Sydney->Melbourne	1/05/2024	2/05/2024	672.68
Hotel Reservation	Trip from Melbourne to Sydney (For Mrs J	9T6R	22/04/2024	->	1/05/2024	2/05/2024	419
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9QVX	2/05/2024	Melbourne->Sydney Sydney->Melbourne	6/05/2024	9/05/2024	1,176.7
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	9QVX	17/03/2024	->	6/05/2024	9/05/2024	795
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9TL3	2/05/2024	Melbourne->Sydney Sydney->Melbourne	27/05/2024	31/05/2024	342.02
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	9TL3	1/05/2024	->	27/05/2024	31/05/2024	1,060
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9VF9	27/05/2024	Melbourne->Sydney Sydney->Melbourne	2/06/2024	6/06/2024	634.89
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	9VF9	26/05/2024	->	2/06/2024	6/06/2024	1,056
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9VFF	27/05/2024	Melbourne->Sydney Sydney->Melbourne	11/06/2024	13/06/2024	308.56
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	9VFF	26/05/2024	->	11/06/2024	13/06/2024	548
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9VFG	18/06/2024	Melbourne->Sydney Sydney->Melbourne	16/06/2024	20/06/2024	415.15
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	9VFG	26/05/2024	->	16/06/2024	20/06/2024	698
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9WNK	28/06/2024	Melbourne->Sydney Sydney->Melbourne	30/06/2024	4/07/2024	538.24
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	9WNK	23/06/2024	->	30/06/2024	4/07/2024	1,056
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9WQV	26/06/2024	Melbourne->Sydney Sydney->Melbourne	16/07/2024	18/07/2024	254.01
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	9WQV	25/06/2024	->	16/07/2024	18/07/2024	548
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9WNL	24/06/2024	Melbourne->Sydney Sydney->Melbourne	22/07/2024	26/07/2024	355.08
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	9WNL	23/06/2024	->	22/07/2024	26/07/2024	1,096
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9WQW	26/06/2024	Melbourne->Sydney Sydney->Melbourne	28/07/2024	1/08/2024	363.2
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	9WQW	25/06/2024	->	28/07/2024	1/08/2024	1,156
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9Y44	1/08/2024	Melbourne->Sydney Sydney->Melbourne	6/08/2024	8/08/2024	1,099.64
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	9Y44	1/08/2024	->Sydney	6/08/2024	8/08/2024	500
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	9Y4R	2/08/2024	Melbourne->Sydney Sydney->Melbourne	12/08/2024	15/08/2024	641.59
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	9Y4R	1/08/2024	->	12/08/2024	15/08/2024	1,062
Air Ticket	Trip from Melbourne Airport, Melbourne,	9Y4X	2/08/2024	Melbourne->Sydney Sydney->Melbourne	25/08/2024	29/08/2024	345.64
Hotel Reservation	Trip from Melbourne Airport, Melbourne,	9Y4X	1/08/2024	->	25/08/2024	29/08/2024	1,176
Air Ticket	Melb to Syd (Julie Birtles)	C693	30/08/2024	Melbourne->Sydney Sydney->Melbourne	9/09/2024	12/09/2024	378.12
Hotel Reservation	Melb to Syd (Julie Birtles)	C693	29/08/2024	->	9/09/2024	12/09/2024	1,167
Air Ticket	Melb - Syd (Ms Julie Birtles)	C6C6	11/09/2024	Melbourne->Sydney Sydney->Melbourne	16/09/2024	19/09/2024	414.8
Hotel Reservation	Melb - Syd (Ms Julie Birtles)	C6C6	1/09/2024	->	16/09/2024	19/09/2024	867
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	C6XT	16/09/2024	Melbourne->Sydney Sydney->Melbourne	22/09/2024	25/09/2024	605
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	C6XT	15/09/2024	->	22/09/2024	25/09/2024	942
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	C7JL		Melbourne->Sydney Sydney->Melbourne	7/10/2024	10/10/2024	513.61
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	C7JL	26/09/2024	->	7/10/2024	10/10/2024	1,002

## Consolidated travel and expenses - Beyond Excellence - 1/1/2022 to 11/2/2026

Booking Type	Request Name	Request ID	Purchased Date	City	Start Date	End Date	Approved Amount (AUD)
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	C7JY	27/09/2024	Melbourne->Sydney Sydney->Melbourne	13/10/2024	18/10/2024	1,224.92
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	C7JY	26/09/2024	->	13/10/2024	18/10/2024	2,820
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	C9GC	15/10/2024	Melbourne->Sydney Sydney->Melbourne	23/10/2024	24/10/2024	510.75
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	C9GC	14/10/2024	->Sydney	23/10/2024	24/10/2024	419
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	C7K4	27/09/2024	Melbourne->Sydney Sydney->Melbourne	29/10/2024	30/10/2024	460.81
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	C7K4	26/09/2024	->	29/10/2024	30/10/2024	434
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	C9TF	29/10/2024	Melbourne->Sydney Sydney->Melbourne	6/11/2024	7/11/2024	595.1
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	C9TF	22/10/2024	->	6/11/2024	7/11/2024	524
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	C9TH	23/10/2024	Melbourne->Sydney Sydney->Melbourne	10/11/2024	15/11/2024	635.06
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	C9TH	22/10/2024	->	10/11/2024	15/11/2024	2,920
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	C9TV	23/10/2024	Melbourne->Sydney Sydney->Melbourne	18/11/2024	20/11/2024	460.81
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	C9TV	22/10/2024	->	18/11/2024	20/11/2024	968
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	C9V4	23/10/2024	Melbourne->Sydney Sydney->Melbourne	24/11/2024	29/11/2024	635.06
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	C9V4	22/10/2024	->	24/11/2024	29/11/2024	2,670
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	CJJ9	2/12/2024	Melbourne->Sydney Sydney->Melbourne	9/12/2024	11/12/2024	491.2
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	CJJ9	1/12/2024	->	9/12/2024	11/12/2024	1,148
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	CMVT	7/02/2025	Melbourne->Sydney Sydney->Melbourne	10/02/2025	12/02/2025	664.82
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	CMVT	6/02/2025	->Sydney	10/02/2025	12/02/2025	704
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	CNHG	24/02/2025	Melbourne->Sydney Sydney->Melbourne	9/03/2025	12/03/2025	583.87
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	CNHG	23/02/2025	->	9/03/2025	12/03/2025	1,017
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	CNHJ	21/03/2025	Melbourne->Sydney Sydney->Melbourne	24/03/2025	26/03/2025	397.44
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	CNHJ	23/02/2025	->	24/03/2025	26/03/2025	768
Air Ticket	Julie Birtles	CRHL		Sydney->Melbourne Melbourne->Sydney	26/03/2025	26/03/2025	724.87
Air Ticket	Julie Birtles	CRHL		Sydney->Melbourne Melbourne->Sydney	26/03/2025	26/03/2025	724.87
Air Ticket	Trip from Melbourne to Sydney (For Ms J	CRCJ	18/03/2025	Melbourne->Sydney Sydney->Melbourne	30/03/2025	1/04/2025	810.01
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	CRCK	18/03/2025	Melbourne->Sydney Sydney->Melbourne	8/04/2025	10/04/2025	397.78
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	CRCK	17/03/2025	->	8/04/2025	10/04/2025	658
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	CWGV	23/04/2025	Melbourne->Sydney Sydney->Melbourne	29/04/2025	30/04/2025	535.66
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	CWGV	22/04/2025	->	29/04/2025	30/04/2025	264
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	CWGW		Melbourne->Sydney Sydney->Melbourne	6/05/2025	7/05/2025	355.54
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	CWGW	22/04/2025	->	6/05/2025	7/05/2025	424
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	CWGX	23/04/2025	Melbourne->Sydney Sydney->Melbourne	11/05/2025	14/05/2025	457.13
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	CWGX	22/04/2025	->	11/05/2025	14/05/2025	897
Hotel Reservation	Hotel Reservation at UTS SYDNEY (ULTIMO,	CWH4	22/04/2025	->	16/05/2025	18/05/2025	708
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	CWGY	23/04/2025	Melbourne->Sydney Sydney->Melbourne	27/05/2025	29/05/2025	457.13
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	CWGY	22/04/2025	->	27/05/2025	29/05/2025	598
Air Ticket	9-12 June (For Ms Julie Birtles)	CXH9	3/06/2025	Melbourne->Sydney Sydney->Melbourne	9/06/2025	12/06/2025	578.01
Hotel Reservation	9-12 June (For Ms Julie Birtles)	CXH9	19/05/2025	->	9/06/2025	12/06/2025	807
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	D3XM	11/06/2025	Melbourne->Sydney Sydney->Melbourne	16/06/2025	17/06/2025	860.9
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	D3XM	4/06/2025	->	16/06/2025	17/06/2025	239
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	D3XN	5/06/2025	Melbourne->Sydney Sydney->Melbourne	19/06/2025	20/06/2025	436.77
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	D3XN	4/06/2025	->	19/06/2025	20/06/2025	249
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	D3XP	5/06/2025	Melbourne->Sydney Sydney->Melbourne	25/06/2025	26/06/2025	459.51

## Consolidated travel and expenses - Beyond Excellence - 1/1/2022 to 11/2/2026

Booking Type	Request Name	Request ID	Purchased Date	City	Start Date	End Date	Approved Amount (AUD)
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	D3XP		->	25/06/2025	26/06/2025	249
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	D7KJ	23/06/2025	Melbourne->Sydney Sydney->Melbourne	30/06/2025	2/07/2025	388.74
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	D7KJ	23/06/2025	->	30/06/2025	2/07/2025	498
Air Ticket	Julie Birtles	D7M7		Melbourne->Sydney Sydney->Melbourne	6/07/2025	9/07/2025	212.72
Hotel Reservation	Julie Birtles	D7M7		->Ultimo	6/07/2025	9/07/2025	89
Air Ticket	Julie Birtles	D7M7		Melbourne->Sydney Sydney->Melbourne	6/07/2025	9/07/2025	212.72
Hotel Reservation	Julie Birtles	D7M7		->Ultimo	6/07/2025	9/07/2025	89
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	D3XQ	25/06/2025	Melbourne->Sydney Sydney->Melbourne	7/07/2025	9/07/2025	398.72
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	D3XQ	5/06/2025	->	7/07/2025	9/07/2025	678
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	D934	9/07/2025	Melbourne->Sydney Sydney->Melbourne	15/07/2025	16/07/2025	1,035.15
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	D934	8/07/2025	->	15/07/2025	16/07/2025	289
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	D936	21/07/2025	Melbourne->Sydney Sydney->Melbourne	23/07/2025	24/07/2025	1,003.88
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	D936	8/07/2025	->	23/07/2025	24/07/2025	459
Air Ticket	Julie Birtles	D9HN		Sydney->Melbourne	24/07/2025	24/07/2025	527.29
Air Ticket	Julie Birtles	D9HN		Sydney->Melbourne	24/07/2025	24/07/2025	527.29
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	D9Q4	29/07/2025	Melbourne->Sydney Sydney->Melbourne	10/08/2025	12/08/2025	578.91
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	D9Q4	28/07/2025	->	10/08/2025	12/08/2025	598
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	D9Q7	29/07/2025	Melbourne->Sydney Sydney->Melbourne	19/08/2025	21/08/2025	540.33
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	D9Q7	28/07/2025	->	19/08/2025	21/08/2025	758
Air Ticket	Julie Birtles	DFDV		Melbourne->Sydney Sydney->Melbourne	1/09/2025	4/09/2025	186
Hotel Reservation	Julie Birtles	DFDV		->Sydney	1/09/2025	4/09/2025	842
Air Ticket	Julie Birtles	DFDV		Melbourne->Sydney Sydney->Melbourne	1/09/2025	4/09/2025	186
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	DFLD	20/08/2025	Melbourne->Sydney Sydney->Melbourne	1/09/2025	4/09/2025	914.6
Hotel Reservation	Julie Birtles	DFDV		->Sydney	1/09/2025	4/09/2025	842
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	DFLD	20/08/2025	->	1/09/2025	4/09/2025	882
Air Ticket	Trip from Sydney to Melbourne (For Ms Ju	DGLK	11/09/2025	Sydney->Melbourne	17/09/2025	17/09/2025	449.84
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	DHLT	7/10/2025	Melbourne->Sydney Sydney->Melbourne	14/10/2025	16/10/2025	873.4
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	DHLT	6/10/2025	->	14/10/2025	16/10/2025	1,008
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	DHWN	14/10/2025	Melbourne->Sydney Sydney->Melbourne	20/10/2025	22/10/2025	764.19
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	DHWN	13/10/2025	->	20/10/2025	22/10/2025	1,108
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	DJD3	23/10/2025	Melbourne->Sydney Sydney->Melbourne	28/10/2025	29/10/2025	1,013.88
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	DJD3	22/10/2025	->	28/10/2025	29/10/2025	519
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	DK44	7/11/2025	Melbourne->Sydney Sydney->Melbourne	17/11/2025	20/11/2025	735.87
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	DK44	6/11/2025	->Sydney	17/11/2025	20/11/2025	1,482.3
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	DK7C	10/11/2025	Melbourne->Sydney Sydney->Melbourne	23/11/2025	24/11/2025	727.88
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	DK7C	9/11/2025	->	23/11/2025	24/11/2025	279
Hotel Reservation	Hotel Reservation at UTS SYDNEY (ULTIMO,	DL3H	26/11/2025	->	2/12/2025	4/12/2025	1,088
Air Ticket	Trip from Sydney to Melbourne (For Ms Ju	DL3K	27/11/2025	Sydney->Melbourne	4/12/2025	4/12/2025	668.97
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	DLYH	20/01/2026	Melbourne->Sydney Sydney->Melbourne	27/01/2026	29/01/2026	845.65
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	DLYH	19/01/2026	->	27/01/2026	29/01/2026	658
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	DM43	22/01/2026	Melbourne->Sydney Sydney->Melbourne	1/02/2026	3/02/2026	704.68
Air Ticket	Trip from Melbourne to Sydney (For Ms Ju	DM44	22/01/2026	Melbourne->Sydney Sydney->Melbourne	11/02/2026	13/02/2026	601.23
Hotel Reservation	Trip from Melbourne to Sydney (For Ms Ju	DM44	21/01/2026	->	11/02/2026	13/02/2026	1,228

## Access application – GIPA2026/04

Beyond Excellence

Total Annual Invoice cost for services

	<b>Cost excluding GST</b>
2022	146,500.00
2023	175,900.00
2024	783,800.00
2025	381,261.00
<b>Total</b>	<b>1,487,461.00</b>

As of 11 February 2026, no invoices have been received from Beyond Excellence