

SWELLEN DAM MUNICIPALITY



STUDY AID POLICY

APPROVED BY COUNCIL PER ITEM A98

Date: 17 June 2022

Implementation date: 1 July 2022

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1. PREAMBLE

The Study Aid Policy is intended to assist the Municipality in securing adequately qualified personnel for its service by providing financial assistance to employees to enable them to qualify themselves educationally for the Municipality's service and to enhance their level of competence to perform the duties assigned to them. This Study Aid Policy (to a cumulative amount of up to R80 000 per annum) will also apply to Councillors. For this purpose the stipulations pertaining to an employee will also be applicable to a Councillor.

2. OBJECTIVES OF THE POLICY

The Municipality's Study Aid Policy is aimed at:

- (a) Ensure that financial aid and resources are available to give fulfillment to the intend of the training and development policies in terms of the Municipal Staff Regulations.
- (b) Enabling full-time municipal employees including senior managers to undergo formal part-time study, modular, or training by means of financial assistance in the form of a study aid policy and leave concessions in order to enable its employees to better qualify themselves for positions on the municipality's staff establishment and to facilitate personnel development.
- (c) Identifying expertise that the Municipality has a need for and to develop this to the benefit of the Municipality to ensure higher quality employees for the municipality; and the municipality undertakes to annually budget, within its financial means, an amount to enable the training of its employees.
- (d) Encouraging self-development activities provided that they are along the lines regarded as beneficial to the municipality by management.

3. QUALIFYING REQUIREMENTS

In the normal course of events the municipality shall recognize only qualification standards that are recognized by the SAQA and that take place at statutory recognized educational or academic institutions. However, the Municipal Manager, in consultation with the Directors, may approve qualifications that are not recognized by the SAQA, but which are in the municipality's general interest.

Recognized *educational or academic* institution where it appears in this policy shall be taken to refer to one of the following:

- (i) South African University
- (ii) Technikon
- (iii) Technical College or a Technical institution
- (iv) Correspondence College
- (v) A government / SAQA approved institution, and / or
- (vi) Any other appropriate institution as approved by the Municipal Manager.

The courses or subjects selected shall be confined to those courses directly linked to operational activities of the municipality. The courses or subjects selected for study purposes shall be confined to the municipality's working environment as well as the

functional and career development activities of the specific employee. Should the request for a study allowance and / or leave concession not comply with the

abovementioned, an employee will be requested to provide a motivation for career change, provided that such a career change is in the interest of the organization. Study aid or leave applications must be properly motivated and be supported by the Director of the relevant Department for recommendation and **approval by the Municipal Manager**.

Directors must recommend the study aid and/or leave in terms of the qualifying requirements. Directors must take into account the implications of recommended study leave in terms of service delivery.

3.1 Criteria for Allocation of Study Aid

All applications must be assessed / prioritised according to the following criteria:

3.1.1 Subject to availability of funds;

3.1.2 All studies must be locally based at an approved institution (within South African Borders), unless otherwise decided by the Municipal Manager.

a) Priority Number One

Employees who must obtain a qualification in order to meet the requirements of the post which they currently occupy.

b) Priority Number Two

Employees who are current study aid holders, and must still complete their studies.

c) Priority Number Three

As determined in the Workplace Skills Plan and IDP.

d) Priority Number Four

Employees who want to study towards their first qualification up to and including Grade 12.

e) Priority Number Five

Employees who are studying for self-development within the context of local government and public service in general.

f) Priority Number Six

Councillors who are studying for self-development within the context of local government and public service in general.

4. PROCEDURE

4.1 Application procedure for a bursary

- 4.1.1 Application for study aid must be done on the prescribed form attached to the policy and / or available at the Human Resources Section, for this purpose and must be completed in full by the employee.
- 4.1.2 Application forms are available from Human Resources on request.
- 4.1.3 The application form must be submitted directly to the relevant Director at least one month before the closing date for submission.
- 4.1.4 No applications that are received after the due date will be considered.
- 4.1.5 Applications must be accompanied by a statement/certificate by the educational institution that the employee complies with the entrance requirements for the course concerned.
- 4.1.6 The career planning of the relevant employee applying for study aid should be attached to the application for study aid.
- 4.1.7 The study aid application of Directors should be approved by Municipal Manager and the study aid application of the Municipal Manager should be approved by the Executive Mayor.
- 4.1.8 The study aid application for Councillors should be approved by Council.

4.2 Procedure for application of study leave

- 4.2.1 Applications for study leave must be submitted on the municipality's official leave form at least one month before the commencement of the leave for study purposes.
- 4.2.2 Applications must be accompanied by the official examination timetable of the educational institution, and/or an official statement by the educational institution concerned that the attendance of classes is obligatory together with the times when such classes have to be attended.

5. STUDY FEES

- 5.1 The term "study fees" will be deemed to include **registration-, class- and examination fees**, but **will not include**:
 - any penalties that are imposed by the educational institution or membership of any student body;
 - any fees in respect of books, equipment, stationery, class notes, travel costs or tools.
- 5.2 The municipality will pay the study fees as agreed **directly** to the educational institution.
- 5.3 The employee must submit documentary proof by means of a statement, account or invoice on which the study fees payable are fully specified and defined.
- 5.4 If an employee has paid the fees, he/she may claim reimbursement on submission of documentary proof of the said amount.
- 5.5 Reimbursement claims may not be submitted after more than six calendar months after passing the final examination of the said course.

- 5.6 An employee who fails a subject/module will not qualify for financial assistance for that specific subject/module.
- 5.7 If an employee passes that module/subject he/ she becomes eligible for further funding.
- 5.8 Employees who enrolled for a recognised course at a university must pay exemption fees for subjects/modules that were passed at another university. Such exemption costs **will not** be paid by the Municipality.
- 5.9 The amount allocated to applicants in terms of this policy will be based on the actual costs reflected on the quotation which will include registration-, class- and examination fees.
- 5.10 With reference to the above; A maximum amount of R20 000 per annum will be granted to applicants after the prescribed application process was followed and approved.
- 5.11 Amounts in excess of the mention maximum amount above can only be approved by the Municipal Manager or his delegated representative.

6. LEAVE

6.1 Examination preparations

An employee, who is studying for an approved qualification, shall be granted study leave (examination and preparation) as follows:

- Examination leave for the date or dates on which he/she is required to present himself/herself as a candidate for examination.
- Study leave, one day per examination paper, solely for the purpose of preparing for an examination prescribed by the registered institution where the employee is registered;
- The study leave benefits shall not apply to an employee who wishes to repeat a qualifying course of study and/or certain modules which was previously written by him/her for which examination leave was taken and which he/she failed.
- Study leave for courses that are not in line with the type of work or type of post that the employee occupies.

6.2 Compulsory full-time class attendance, practical assignments and group projects

In the case of obligatory class attendance, attendance of virtual classes, practical assignments and group projects, employees may be granted a maximum of five working days' study leave per annum, subject to the submission of valid proof from the educational institution – in addition to the study leave granted to prepare for examinations.

If further study leave is requested, an employee will use his/her vacation leave and/or the principle of unpaid leave shall apply, unless the Municipal Manager decides otherwise. The educational institution must provide proof of the obligatory aspect.

6.3 Compulsory Modular / Block week

A maximum of six weeks study leave per annum shall be allocated for this purpose (i.e. in cases where an employee has to attend class for five or more consecutive

days), if it exceeds six weeks an employee will use his/her vacation leave and/or the principle of unpaid leave shall apply, unless the Municipal Manager decides otherwise.

6.4 Number of years for which assistance is granted

(Subject to compliance with terms as set out in "Employee obligations" below.)

Assistance to study for approved qualifications will be awarded to employees for a total period of not more than five years per qualification (two years per standard in respect of school studies; two years in respect of Honours degrees, Higher/Advanced Diplomas; three years in respect of Master's/Doctor's degrees). This period may be decreased or extended at the discretion of the relevant Director.

The number of years for which assistance will be granted will be determined at the commencement of the course, unless the Director waives this requirement. However, if an employee has been granted "leave of absence" by his/her academic institution, or if he/she decides to postpone his/her studies, the study aid period may be extended by a corresponding period, at the discretion of the Director. No financial assistance will be provided in the period of postponement or "leave of absence".

7. EXAMINATION RESULTS

Employees will be obliged to submit their examination results to the Human Resources Department within one month of receiving the said results, as proof that the examinations were taken on the days for which leave had been granted to them for study purposes.

8. EMPLOYEE OBLIGATIONS

8.1 Leaving the Municipality's service

An employee will be required to remain in the municipality's service for a period of one year for each year which financial assistance was received. This required period will come into effect annually on the date on which the last examination for that year is written. Where no examination was taken, but a thesis was submitted, the required period will come into effect 365 days after the registration date in respect of that year. If an employee leaves the municipality's service before completing his/her studies, the employee will have to repay the amount which at that stage had been paid by the municipality on behalf of the employee in terms of the study aid concerned.

The employee will be liable for all costs of legal action instituted against him/her to recover monies owed to the municipality for study purposes, including interest at the current prime rate, from the date on which such monies are due to the municipality as well as legal costs on a scale of attorney to attorney and/or attorney to client and collection commission.

If an employee leaves the municipality's service for any reason whatsoever after financial assistance has been given and before the period within which he/she is required to remain in the municipality's service has expired (including dismissal, but excluding death or legal inability to carry out duties), he/she will be liable for the

immediate total repayment of the **registration, class and examination fees** that the municipality has paid on his/her behalf in terms of the study aid scheme.

8.2 Withdrawal of assistance

If in the first two years of study an employee does not pass at least two subjects in respect of a course leading to a university degree or diploma, or four subjects in respect of any other diploma/certificate course, assistance in terms of the study aid scheme will be withdrawn and the employee will be required to repay the registration, class and examination fees that the municipality has paid on his /her behalf in respect of the study course concerned over a period as determined by the Municipal Manager (at the standard rate as applicable from time to time).

Apart from employees meeting the criteria for further assistance they will be required to repay all monies in respect of failed subjects /modules. If assistance to an employee has been withdrawn in respect of the above-mentioned, the amount owing will not be proportionally decreased.

If in the opinion of the relevant Director there are circumstances that justify the postponement of the particular period, the Municipal Manager may postpone such a period by one year.

If on expiry of the above-mentioned two-year period the employee did not make reasonable progress with his/her studies (as determined by the Director), the Municipal Manager on recommendation of the Director concerned may withdraw assistance with regard to the study aid scheme. In such a case the employee will be required to repay all monies paid by the municipality on his/her behalf in respect of the study course concerned, in terms of the provisions as set out in the previous paragraphs.

Councillors who do not remain in Council for whatever reason for the period indicated in item 11, will have to re-imburse the full course fees to Council.

8.3 Employee undertaking

An employee who has been awarded assistance in terms of the municipality's study aid scheme must undertake in writing to adhere to the provisions as set out in the Study Aid Policy. He/she must also in writing irrevocably authorise the Finance Department to deduct any amounts owing by him/her to the municipality in terms of the provisions of this policy from his/her salary and/or other monies due to him/her.

9. Termination of Service: Contract Period

The Municipal Manager reserves the right to at any time terminate an employee's employment period, irrespective of whether or not the employee has entered into a contract with the municipality, and the municipality will in no way whatsoever be obliged to employ the employee for his/her "contract period". The Municipal Manager has the right to waive an employee's contractual obligation in the case of dismissal. The Municipal Manager will waive an employee's contractual obligations in the case of personnel reduction.

All monies owed by the employee to the municipality in terms of his/her study aid contract on termination of service will, subject to the provisions of section 37 of the Basic Conditions of Employment Act, 1997 (Act 75 of 1997), be deducted from his/her salary or pension payments, provided that if the study fees are not repaid to the municipality on the last day of the employee's service due to one reason or another, interest will from the next day be levied on the outstanding amount at the current prime rate at that time.

10. Employer Initiated Training and development

In cases where the employer initiates training and learning interventions in terms of the training and development policies and in line with the Municipal Staff Regulations, without the employee requesting or applying, no "service period" will be required and no costs will be deducted from the employee if he/she leaves the municipality.

11. Employee Applying or Requesting Short Course or Skills Training

In cases where employees requested or applied for short courses without their immediate posts requiring the knowledge or skills, the following rules will govern their requests:

Period of Course	< 5 days	> 5 days to 1 month	>1 month to 6 months	6 months to 1 year
Service Period	None	3 months	6 months	1 year
Costs Deduction	No Deductions	Deduct Course Fees	Deducts Course Fees	Deduct course fees

12. Power of delegation to Municipal Manager

In terms of this policy, the Municipal Manager (or a person nominated by him/her) is mandated to consider and approve applications for "Study Aid". Such approval shall be based on the conditions set out above and the merit of each application in conjunction with the applicable Director, taking cognizance of the employees' career development path.