

**“ The City of Heritage ”**



# **ULUNDI LOCAL MUNICIPALITY**

## **ATTENDANCE OF SEMINARS, EXTERNAL MEETINGS, WORKSHOPS AND CONFERENCES POLICY**

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AND CONFERENCES POLICY**

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## 1 Policy Purpose

The purposes of the policy are:

- To ensure that staff and officials have the opportunity to attend related meetings, workshops and seminars and conferences.
- To provide an operational policy framework to ensure responsible, consistent, cost effective and efficient management pertaining to attending local, national and international conferences, external meetings or workshops, speaking at conferences, and representation on professional and other bodies, associations, institutions or groups.
- To support good governance.
- To provide criteria for the attendance of meetings, workshops or conferences at national and international level.
- To provide a procedure for nominating officials to attend meetings, workshops or conferences at national and international level.

## 2 Policy Scope

The policy is applicable to all employees and also applies in cases where employees accompany Councillors on their attendance of seminars, workshops or meetings.

## 3 Policy Definitions

**“conference”** An organised meeting of persons with common interests, especially professional interests, for the purpose of sharing information, opinions and networking.

**“Profession-specific conference”** A meeting or series of meetings devoted to discussion and demonstration of practical applications in a specialised field or subject.

**“seminar”** A discussion group or meeting to exchange ideas in a business, a happening of significance, a distinct happening or regular occurrence to promote specific objectives of the Municipality.

**“External meeting/workshop”** A meeting/workshop organised and/or arranged - by a party other

than the Municipality; which takes place outside the Municipal premises; is not directly linked to functions/tasks of the official.

**“work-related meeting/workshop”** A meeting that is related to the inherent requirements of the official’s job function and that is taking place within the boundaries of the municipal area.

**CPD** Continuous Professional Development.

**EDT** Education, Development and Training Policy.

**ETD** Education, Training and Development.

**HDI** Historically Disadvantaged Individual.

**IDP** Integrated Development Plan.

**MIR** Municipal International Relations Policy.

#### **4 Legislative Framework**

The following legislation and other policies are applicable:

- Municipal International Relations Guideline and Draft International Relations Policy.
- Subsistence and Travel Policy.
- The Municipality’s Policies on leave, in particular the Special Leave Policy and the relevant provisions in the Education Training and Development Policy (ETD).
- Local Government: Municipal Finance Management Act, 2003 (Act 56 of 2003).
- Local Government: Municipal Systems Act, 2000 (Act 32 of 2000).
- Systems of Delegations.
- Integrated Development Plan.
- Education Training and Development Plan. In case of conflict between this policy and the EDT Policy, the EDT policy takes precedence.
- Collective Agreements. In case of conflict between this policy and a collective agreement, the collective agreement takes precedence.
- The Time and Attendance Policy.

## **5 General Policy Provisions**

Permission to attend seminars, conferences, workshops and meetings may be granted to employees on the basis that the event is of direct benefit to the Municipality, work outputs of the employee concerned or continuous professional development of the employee. The provisions, principles and restrictions as outlined in the ETD Policy will apply in respect of attendance of seminars, conferences, workshops and meetings for the purposes of development as aligned to the individual's PDP, the Municipality's Workplace Skills Plan and the Continued Professional Development process.

Where approval as referred to in Clause 4.2 is granted, the employee must be deemed to be on official duty and full salary and benefits apply.

The ambit of integrity, sound management principles, budgetary constraints and serving the best interest of the organisation and broader public have a bearing on the attendance of seminars, conferences, workshops and meetings.

### **5.1 General Attendance Criteria**

The following criteria apply when approving applications to attend conferences, external meetings, workshops and seminars:

#### **Business imperative**

- Relevance of the event to the applicant's work functions.
- PDPs of the employee in relation to the employee's CPO and WSP (the provisions of the ETD Policy will apply).
- Whether the event ties in with the Directorate's business plan or core functions, the Municipality's strategic objectives and future challenges.
- Whether the attendance is in response to a pre-determined need or ad hoc.
- Whether the event is aligned with other approved policies.
- Whether the event is aligned with the employee's job description.
- Whether the event forms part of the municipal learning and developing strategy and plan.

## **5.2 Criteria relating to Who Should Attend**

The following criteria apply to determine who should attend any of these events.

- If the official has attended a conference before, whether it is necessary for the same person to go again. The reasons may include work-related special skills, knowledge of the employee and/or need for continuity and consistency.
- Whether there is a need to expose more than one person to the vent for it to be effective.
- The employee is an elected representative in the management structure of an institute (including subcommittees, working groups, etc.).
- Recognized institution or relevance of institution for Local Government.
- Specialist knowledge or experience.
- Incentive or reward for the employee (as envisaged in the Recognition and Reward Policy).

## **5.3 Attending Local and National Events**

When applying the criteria listed in paragraph above, the following must be taken into account as well:

- Consistency considerations. Certain local and national events are ‘meetings’ that take place on a fairly regular basis, e.g. the SA Cities Network. For the sake of consistency, it is required that the same staff member attends. It will add value if at least one of the representatives nominated to attend has PDI status and/or a gender equity category, should funding allow.
- Intergovernmental events should receive higher priority than ad hoc events offered by private enterprise.
- The number of employees to attend must be limited. The number to attend must be determined by the delegated authority based on operational requirements, budget and motivation, except in case of a local event. For local events, the number of officials allowed to attend is determined by the Executive Director concerned, subject to operational requirements.

- Initiatives by employees to deliver papers and/or have costs reduced or waived must be recognized, provided that the conference is held under the auspices of an institute recognized by the Municipality.
- The extent to which the event will contribute to the official's CPO requirements in terms of membership, the provisions of the ETD Policy in respect of CPO will apply.
- When elected to the management or governance structures of a recognised institute, professional association, recognised pension fund or medical aid fund, the number of days for this purpose is limited to not more than 12 working days per annum (excluding travel time).

#### **5.4 Procedure for Submission of Requests**

Requests for local events (within the Municipal area) must be submitted to the relevant Director for approval at least two weeks prior to the event.

Note: Where the attendance of a meeting is work-related, i.e. an inherent requirement of the official's job function and where such meeting is held within the Municipal area, such attendance will be managed in terms of the Time and Attendance Policy.

Requests for national events (outside of the Municipal area) must be submitted via the office of the Director for approval by the Executive Director (ED) two weeks prior to the event. Requests must be submitted together with a programme of the event. Where travel and accommodation costs are involved, the request must be accompanied by a quotation from the Municipality's approved travel agent.

Requests must be fully motivated and for national events all the information relevant to paragraph 4 must be submitted as well. In cases where a request is declined or not recommended, it is the responsibility of the Executive Director or Director to inform the employee of the decision and the reasons for the decision.

## **5.5 Failing to Attend**

If any employee or councillor is delegated to attend a seminar/meeting/workshop and has received the necessary allowances and is prevented from attending, due to whatever circumstances, after the matter has been assessed, all monies shall be paid back immediately. Failing this, the monies shall be deducted from the monthly salary of the employee or councillor concerned. If this is not done, discipline will proceed, after the matter has been assessed. This expenditure will be classified as fruitless expenditure.

Delegates / representatives to any conference, workshop or meeting must ensure that they arrive on time and attend until the conclusion of such event, failing which the Council will take the necessary steps to recover all expenses incurred by an association, or by the Council, to enable such delegate / representative to attend, provided that such delegate / representative be afforded the opportunity to submit reasons for not being able to be present from commencement to conclusion of such an event

## **5.6 Reporting – Knowledge Sharing**

A feedback report on conferences, seminars and workshops must be submitted to the Director in respect of local events and to the ED via the Director's office, in respect of national events within 30 working days of the attendance of the event.

## **5.7 International [Overseas] Conferences**

International travel must be planned well in advance and form part of the strategic plan of the Directorate. Therefore, budgetary provision should be made. Envisaged international travel should culminate in an annual travel program or calendar for the Directorate. Each Directorate must compile and oversee such a program or itinerary.

Only in highly exceptional cases will ad hoc requests for travel outside of the annual programme or itinerary be approved. Such requests must be supported by a well-motivated written submission

addressing inter alia the urgency, necessity, and benefits for the Municipality, as well as the budgetary impact or provisions.

No official may initiate or undertake the planning of any official overseas travel without the prior approval of the delegated authority (through the normal communication channels or chain of command).

The application must be considered and recommended by the relevant ED as well as the relevant Mayoral Committee member. The same applies in respect of invitations to attend conferences, participate in study tours, and participate in national conventions at international level, to present a paper or address a conference, seminar, convention or any related event or initiative.

Under no circumstances will the delegated authority be pressured to approve overseas travel because an official initiated such invitation for any purpose (including personal gain or development).

All submissions to undertake overseas travel must be well motivated and in writing. A comprehensive (detailed) budget or costing programme and travel or accommodation itinerary must be prepared and presented as part of the planning stage.

No lobbying or influencing of politicians or senior officials outside the normal chain of command or lines of communication will be tolerated. Only after final written approval for overseas travel has been obtained, officials may proceed with accommodation reservations, flight bookings or any other formal arrangements. Should officials proceed with any arrangement without prescribed written approval, such officials will be held liable for fruitless expenditure.

Any overseas travel will be conducted strictly within the approved budget for the trip. Advances for the trip may only be acquired or paid out within 10 [TEN] working days in advance of a trip. Claims must be submitted within 5 [FIVE] working days upon return from any trip. Claims will be managed strictly within the approved policy or guidelines. EDs must ensure a fair and transparent approach in nominations for overseas travel. The employer must also ensure that

expertise in this regard is not only limited to a few. Upon return from overseas travel the EDs must further ensure the proper transfer of knowledge and that networking contacts are shared.

## **5.8 Application to Attend Procedure**

A fully motivated report for signature and comments by the relevant Director, ED and Municipal Manager must be submitted to the Executive Mayor on the corporate template [Executive Mayoral report template]. The report must be submitted to the ED's office four weeks prior to the event. There may be exceptions to this timeline, if it can be proved that notification of an event was received late. Where relevant, a completed SAP nomination form signed by all relevant parties, must accompany the abovementioned report, as well as documentation such as invitations and programmes. The latter must be attached as annexures and indicated as such on the report template. Financial implications must be clearly outlined in the report as well as on the SAP nomination form, and a quotation provided by the Municipality's approved travel agent must be attached. Motivations for attendance must also be guided by the Municipality's MIR Policy.

In cases where a request is declined and/or not recommended, it is the responsibility of the ED or Director to inform the employee of the decision and the reasons for the decision.

## **5.9 Reporting – Knowledge Sharing**

A comprehensive report on each trip must be presented to the Municipal Manager's Office (via the Director: International Relations) within 20 [TWENTY] working days after returning from international travel. Such report should include a clear overview of the outcome and the results achieved. Copies of the trip authorisation, final itinerary or programme, budget or costing and the claim must be attached to the report as an annexure. This report will also serve as a valuable base document for future reference, corporate knowledge and audit purposes.

## **5.10 Representation External Bodies**

Representation on Statutory Bodies, Professional Organisations and Other Bodies is acknowledged by the Municipality. Employees appointed or nominated as representatives on statutory bodies, recognized pension funds or medical aid funds, and other local government related bodies where the Council must be represented or has a substantial financial or other stake or interest will be granted special leave as required to execute the functions associated with the appointment and/or nomination. Employees elected as representatives on professional institutes or organisations recognized by Local Government, as well as recognized pension funds or medical aid funds, will be granted special leave of not more than 12 [TWELVE] working days (excluding travel time) to attend meetings, etc. of such institutions or organisations.

Where an employee serves as an office bearer, e.g. President, Vice President, Treasurer or equivalent position on the Board of an institute, he/she may be granted an additional 12 [TWELVE] working days' special leave if considered to be necessary. In respect of an elected member of a professional institute or organisation, the application is to indicate the term of office for which approval is requested. Attendance is subject to exigencies of the service and the provisions of this policy.

Costs in respect of travelling and accommodation to attend such conferences, seminars, meetings, etc. will be borne by Council for not more than 4 [FOUR] events per annum provided that provision has been made in the budget.

## **5.11 Delegation Procedure**

A fully motivated report, for signature and comments by the relevant Director, ED and Municipal Manager, must be submitted to the delegated authority on the prescribed template. The report must be submitted to the ED's office 4 [FOUR] weeks prior to the event. There may be exceptions to this timeline if it can be proved that notification of an event was received late. Where the application will entail repeated events, such as attending meetings of a professional body's executive or national/provincial working groups, a once-off approval may be granted for such

attendance, and it will not be necessary to re-apply for authority for each repeated event. A completed SAP nomination form signed by all relevant parties must accompany the abovementioned report, as well as documentation such as invitations and programmes. The latter must be attached as annexures and indicated as such on the report template. Financial implications must be clearly outlined in the report as well as on the SAP nomination form and a quotation provided by the Municipality's approved travel agent must be attached. The report must further contain all information relevant to paragraph 5.1. Motivations for attendance must also be guided by the Municipality's MIR Policy.

### **5.12 Speaking at events**

Where employees have volunteered or been invited in his/her personal capacity as a speaker or to present a paper, full motivation must accompany the request to attend the event as a speaker, clearly indicating the benefits that this will have for the Municipality and the staff members' job. Any payment made to the employee as a speaker or to present a paper must be declared and approval sought by the relevant authority to retain such payment.

The abovementioned provisions exclude employees conducting public speaking for their own benefit and who obtained permission under the Private Work Policy. Employees are required to take their own leave in this case.

### **5.13 Leave of Absence**

Except for the instances covered under paragraph 5.4 above, leave of absence to attend approved meetings, workshops, seminars and conferences is granted in terms of the applicable policy indicated in paragraph 3.3 above, subject to prior approval by the delegated authority.

### **5.14 Roles and Responsibilities**

The ED: Corporate Services is responsible for communicating this policy to all employees. The Line Manager and the Director: Personnel Services should monitor and ensure adherence to the

provisions of this policy and report on specific cases of non-compliance as and when required to do so.

### **5.15 Recognition of institutes and professional and statutory bodies process**

A formal report with supporting documentation regarding the employee's election to the respective institute or body needs to be submitted through his/her Line Manager in the normal manner.

### **5.16 Criteria for Recognition**

The institute or body has been established in terms of a law or statute, e.g. the Engineering Profession Act, 2000 (Act 46 of 2000).

The institute or body carries significant status and importance in Local Government and the employee's membership will contribute to improved service delivery.

## 6 ANNEXURE A

### Statutory bodies

Name	Acronym [if Applicable]
Engineering Council of South Africa	ECSA
Health Professions Council of South Africa	HPCSA
Institute of Electricians	SAIEE
Institute of Internal Auditors	
Institute of Risk Managers of South Africa	IRMSA
South African Council for Professional and Technical Surveyors	PLATO
South African Council for the Quantity Surveying Profession	
South African Council of Planners	SACPLAN
South African Council for Project Management Professionals	
South African Council for Social Service Professions [Registration Body for Social Workers]	
South African Council for the Project and Construction Management Professions	SACPCMP
South African Institute of Chartered Accountants	SAICA
South African Pharmacy Council	

### National Bodies

Name	Acronym [if Applicable]
Association of Municipal Electricity Undertakings	
Council for South African Architects	-
Disaster Management Institute of Southern Africa	DMISA
Employee Assistance Professionals Association – South Africa	
Geo-Information Society of South Africa	GISSA
Institute for Municipal Personnel Practitioners	
Institute of Administration and Commerce	
Institute of Electrical and Electronic Engineers	IEEE
Institute of Environmental Recreational Management	IERM
Institute of Licensing Officers	
Institute of Municipal Administrators of South Africa	IMASA
Institute of Municipal Finance Officers	IMFO
Institute of Municipal Public Safety [Law Enforcement]	IMPSA
Institute of People Management	
Institute of Risk Management of South Africa	IRMSA
Institute of Road Transport Engineers	IRTE
Institute of Traffic Officers and Metropolitan Police Officers	ITMPO
Institute of Waste Management of Southern Africa	IWMSA
Institution of Certificated Mechanical and Electrical Engineers of South Africa	ICMEESA
Institution of Municipal Engineers of Southern Africa	IMESA
International Association for Impact Assessment	IAIA

Name	Acronym [if Applicable]
Library and Information Association of South African	LIASA
Pharmaceutical Society of South Africa	PSSA
Project Management Institute	
Road Traffic Management Corporation	RTMC
Public Relations Institute of South Africa	PRISA
South African Council for Natural Scientific Professions	SACNASP
South African Institute of Civil Engineering	SAICE
South African Institute of Ecologists and Environmental Scientists	SAIEES
South African Planning Institute	SAPI
South African Council for Property Valuations Profession	SACPVP
South African Emergency Services Institute	SAESI
South African Geomatics Institute	SAGI
South African Institute of Electrical Engineers	SAIEE
South African Institute of Environmental Health	
South African Institute of Mechanical Engineering	SAIMECHE
South African Institute of Project Managers	SAIPM
South African Institute of Valuers	SAIV
South African Maintenance Association	SAMA
South African Medical Association	SAMA
Water Institute of South Africa	WISA

### Forums/working groups

CAEWC

Chief Financial Officers' Forum

Skills Development Forum [SDF] or LGSETA

Municipal Managers' Forum

SALGA Working Groups, Workshops and other SALGA related meetings Speakers' Forum

PAFTECH

Premier, Mayor, Advisory Forum [PMAF]

Electricity

NRS

Electricity Suppliers Liaison Committee

Standards South Africa

African Utilities

[TRMCC]

Traffic

Road Traffic Management Coordinating Committee National, Provincial and Metropolitan

Law Enforcement Technical Committee [LETCOM] National, Provincial and

Metropolitan

Provincial Legislative Working Group

Institute of Traffic Officers and Metropolitan Police Officers [ITMPO]

The Traffic Chiefs' Forum

Western Cape Provincial Transport Technical Committee [PROVTECH]  
 Law enforcement Institute of Municipal Public Safety [IMPSA]  
 Liquor Task Team – National and Provincial Government  
 South African Revenue Protection Association – Metals Theft Unit  
 Metropolitan police Metropolitan Police and Traffic Services – nationally.

**Special interest groups**

Name	Acronym [if Applicable]
Association of Certified Fraud Examiner South Africa	ACFE
Association of Professional Heritage Assessment Practitioners	APHP
Association of South African Professional Archaeologists	ASAPA
BPESA Western Cape [Calling the Cape] [Communication/Call-Centre Industry]	
Cape Institute of Architectures	CIA
Collections and Transport Interest Group of IWMSA	CTIG of IWMSA
Environmental Education Association of Southern Africa	EEASA
Environmental Law Association	
Foundation for Professional Development [Health Professionals]	FPD
Heritage Committee of the Cape Institute of Architecture	HCCIA
Human resource Network Initiative [for environment, conservation and natural resource management]	HRNI
Illumination Engineering Society of South Africa	
Landfill Interest Group [In IWMSA]	LIG in IWMSA
Local Governments for Sustainability	ICLEI
Marine and Coastal Educators Network	MCEN
South African Monitoring and Evaluation Association [Interest group]	SAMEA
Society of Radiographers of South Africa	SORSA
South African Board for People Practices	
Southern African Institute for Occupational Hygiene	
The National Association for Clean Air	NACA
Waste Minimisation and Recycling Interest Group	WMRIG of IWMSA