

“ The City of Heritage ”



ULUNDI LOCAL MUNICIPALITY

STUDY AID AND LEAVE POLICY

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1 Policy Purpose

The purpose of this policy is to provide officials with guidelines regarding studying, subsequent leave, examination and the obligations of officials and includes the following:

- Enabling full-time Council employees to undergo formal part-time study, modular , full time or training by means of financial assistance in the form of a study aid bursary and leave concessions in order to enable its employees to better qualify themselves for posts on Council's staff establishment, to in this way facilitate personnel development.
- Identifying expertise that Council has a need for and to develop this to the benefit of Council to in this way ensure higher quality employees for Council; and Council shall undertake to annually budget, within its financial means, an amount to enable the training of its employees

This policy applies to all municipal employees.

The following definition is applicable to this policy

“Assistance” means to provide somebody or something with help or with what is needed to achieve

This document is established within the framework of the following legislation and policies:

South African Qualifications Authority Act, 58 of 1995 (this lays the foundation for the Employment Equity Act, No. 55 of 1998

This policy must be read concomitant with the Municipality's

Performance Management System;

Rewards and Incentives Policy

2. Policy Scope 3

This Policy applies to whomsoever has qualified based on existing contract of employment or governance. Mechanisms to go beyond one's employability shall operate on instances of non-fulfilment of the aid condition.

3. Policy

2 Definition

A study aid for purposes of this Policy is defined as a non-obligatory availing of finance that becomes non-refundable upon completion of an approved study area.

4. Legislative Framework

National Qualifications Framework (NQF)

Employment Equity Plan and
Workplace Skills Plan.

5. General Policy Provisions

The following sections reflect the provisions of this policy:

5.1 Qualifying Requirements

In the normal course of events Council shall recognise only qualification standards that are recognised by the Human Sciences Research Council (see attached Annexure A) and that take place at statutory recognised educational or academic institutions. However, Departmental Heads may after joint sessions approve qualifications that are not recognised by the HSRC, but which are in Council's general interest.

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

- South African University,
- University of Technology,
- Technical College or a Technical institution,
- Correspondence College,
- A government/SAQA approved institution, and/or
- Any other appropriate institution as approved the Municipal Manager.

The courses or subjects selected shall be confined to those courses directly linked to operational activities of the Municipality, especially as espoused in the Integrated Development Plan.

The courses or subjects selected for study shall be confined to the municipality working environment as well as the functional and career development activities of specific employee.

Should the request for a study allowance and/or leave concession not comply with the above mentioned, an employee will be requested to provide a motivation for career change, provided that such career change is in the interest of the organisation.

Study aid or leave applications must be properly motivated and be supported by the head of the department for recommendation for the approval by the municipal manager.

Departmental head must recommend the study aid or leave in terms of the qualifying requirements.

Departmental head must take into account the implication of recommended study leave in terms of service delivery.

5.2 Criteria for Allocation of Study Aid

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

- Subject to availability of funds, all studies must be undertaken at an approved institution (within South African borders), unless otherwise decided by the Municipal Manager.
- Priority Number One - Employees who are current study aid holders, and must still complete their studies.
- Priority Number Two - Employees who want to study towards their first qualification up to and including Grade 12.
- Priority Number Three - Employees who must obtain a qualification in order to meet the requirements of the post which they currently occupy.
- Priority Number Four - As determined in the Workplace Skills Plan, IDP and Employment Equity Plans or as determined and approved for career development by the municipal manager.
- Priority Number Five - Employees who are studying for self-development within the context of local government and public service in general.

5.3 Application Procedure for Bursary

Application or study bursaries must be done on the form prescribed for this purpose and must be completed in full by the employee. Application forms and contracts are available from Human Resources on request.

The form must be submitted directly to the Departmental Head (after approval has been obtained from the Divisional Head) at least two weeks before the closing date for submission. No applications that are received after the due date will be considered.

Applications must be accompanied by a statement/certificate by the educational institution that the employee complies with the entrance requirements for the course concerned.

5.4 Procedure for Application of Study Leave

Applications for leave for study purposes must be submitted on Council's official leave form at least one month before the commencement of the leave for study purposes. 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.

5.5 Study Fees

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. Council will pay the study fees in full directly to the educational institution.

The employee must submit documentary proof by means of a statement, account or invoice on which the study fees that are payable are fully specified and defined.

If an employee has paid the fees, he/she may claim reimbursement on submission of documentary proof of the said amount. Reimbursement claims may not be submitted more than six calendar months after passing the final examination of the said course.

If an employee fails a subject/module, he/she must repay to Council the fees in respect of the subject/module that he/she had failed within a period as determined by the Municipal Manager or his nominee. Such an employee will qualify only once more for financial assistance in respect of the specific subject/module. If an employee fails the subject/module for a second time, financial assistance for the specific subject/module will be totally withdrawn and the employee must repay to Council the cost of the subject/module that he/she had failed.

Council will pay no amount in respect of book costs, equipment, stationery, class notes, travel costs or tools. In the case of new employees Council will repay the study fees for approved courses for the year in which they had joined Council, on condition that they had been employed by Council at registration for that year and that they are employed by Council on the successful completion of their studies.

Employees who enrolled for a recognised course at a university must sometimes pay exemption fees for subjects/modules that were passed at another university. Such exemption costs will not be paid by Council.

5.6 Special Study Leave

5.6.1 Special Leave: Personnel Leave Regulations

Special leave is calculated on the basis of one day being granted for each day that the employee writes an approved examination plus a corresponding period for the preparation thereof. Such leave may be taken only in the period after the date on which the employee had submitted the appropriate examination timetable until the last day on which he/she is writing such examinations.

5.6.2 Examination Preparations

In addition to the special leave referred to above, employees who follow approved study courses may be granted a maximum of five working days' study leave per annum to prepare for approved examinations, on condition that they take corresponding number of days accumulative leave for this purpose, and that employees have accumulated leave to their credit. Master's/doctor's degree students are also granted a maximum of five working days' study leave per annum, on condition that they take corresponding number of days accumulative leave for this purpose, and that they have accumulated leave to their credit. Such leave must be taken before taking the final examination for the relevant year.

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

In the case of obligatory full-time class attendance, 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 – on condition that they take corresponding number of days' accumulative leave for this purpose and have accumulated leave to their credit. The educational institution must provide proof of the obligatory aspect.

Approval of study leave will not be granted in respect of subjects/modules that are repeated for a third time, or for supplementary examinations. Special leave as referred to in (a) is applicable in this instance.

5.6.4 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.

5.6.5 Full-Time Studies

The following requirements will be strictly observed in tandem with the qualifying requirements, unless otherwise determined by the Municipal Manager:

An employee must satisfy the Municipal Manager that the said course cannot be offered anywhere either part-time, by correspondence or in any other arrangement short of full-time studies,

An employee must satisfy that such a course is essential on the basis of operational requirements, such a course will not exceed 12 months, unless otherwise determined by the Municipal Manager,

An employee will be entitled to his/her normal remuneration and conditions of service,

An employee will be obliged to report for duty at his or her workplace during vacations of educational institution.

5.7 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 Departmental Head, acting on recommendation of the Municipal Manager.

The number of years for which assistance will be granted will be determined at the commencement of the course, unless the Departmental Head 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 Departmental Head. No financial assistance will be provided in the period of postponement or "leave of absence".

5.8 Examination Results

Employees will be obliged to submit their examination results to the Human Resources Division 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.

5.8.1 Financial Recognition

A once-off cash bonus, equivalent to the difference between his/her current salary notch and two notches above his/her current notch on the key scale, will be awarded to an employee for the successful completion of an approved study course.

If an employee obtains an additional qualification at the same level as a completed study course for which he/she has already received a cash bonus, the employee will not qualify again for a further cash bonus.

Employees at the top of their salary scales, or who do not qualify to exceed the barrier notches within their salary scales, also qualify for the above-mentioned cash bonus. Cash bonuses will not be awarded for obtaining the minimum qualifications required for a specific post.

If an employee has successfully completed a degree or diploma, such an employee is not obviously eligible for promotion as a direct result of the completion of the qualification. Bonuses will only be paid on submission of documentary proof by the training institute that the course has been successfully completed.

5.9 Employee Obligations

5.9.1 Leaving Council's Service

An employee will be required to remain in Council's service for a period of one year for each year for which leave concession was granted or 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 Council's service before completing his/her studies, the employee will have to repay the amount which at that stage had been paid by Council on behalf of the employee in terms of the study bursary concerned or leave days taken.

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

If an employee leaves Council service for any reason whatsoever after financial assistance has been given and before the period within which he/she is required to remain in council'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 Council has paid on his/her behalf in terms of the study aid scheme.

The repayment is subject to a proportional reduction with regard to that portion of the contract period that he/she has completed (on condition that the Municipal Manager or his nominee may permit such repayment over a period as determined by him and at the standard interest rate as applicable from time to time).

5.10 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 Council has paid on his/her behalf in respect of the study course concerned over a period as determined by the Municipal Manager or his nominee (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 an employee is required to do military service during the said period, such a period will be postponed for the duration of his/her military service.

If in the opinion of the employee's Departmental Head 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 Departmental Head), the Municipal Manager on recommendation of the Departmental Head concerned may withdraw assistance with regard to the study aid scheme. In such a case the employee will be required to repay to Council all monies paid by Council on his/her behalf in respect of the study course concerned, in terms of the provisions as set out in the previous paragraph.

5.11 Employee Undertaking

Applications for study aid must be submitted on the form prescribed for this purpose. The form must be submitted directly to the Departmental Head (after approval has been obtained from the Divisional Head) at least three weeks before the closing date for registration.

Application forms and contracts are available on request from the Human Resources Division.

An employee who has been awarded assistance in terms of Council's study aid scheme must undertake in writing to adhere to the provisions as set out in paragraphs (a) and (b) of this section. He/she must also in writing irrevocably authorise the Treasurer to deduct any amounts owing by him/her to Council in terms of the provisions of the scheme from his/her salary and/or other monies due to him/her.

5.12 Termination of Service: Contract Period)

(To be included in contract.)

Council 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 Council, and Council will in no way whatsoever be obliged to employ the employee for his/her "contract period". Council has the right to waive an employee's contractual obligation in the case of dismissal. Council will waive an employee's contractual obligations in the case of personnel reduction.

All money owed by the employee to Council 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 Council 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.

5.13 Records and Reporting

Data relating to the processes of this should be captured and analysed to determine trends to facilitate improvements to the process. This information should be reported and evaluated by the municipality. The alignment of the data with the Municipality's Performance Management System, Rewards and Incentives Policy; Employment Equity Plan and Workplace Skills Plan.

ANNEXURE A

SCHOOL CERTIFICATES

National Junior Certificate Grade 10

National Senior Certificate Grade 12

CRAFT TRAINING

National Technical Certificate Part One (NTC 1) Std. 8 (Grade 10) National

Technical Certificate Part Two (NTC 2) Std. 9 (Grade 11)

National Technical Certificate Part Three (NTC 3)

National Technical Diploma

NATIONAL DIPLOMAS:

Civil Engineering

Commercial Practice

Environmental Health

Fire Service Technology

Internal Audit	Senior Certificate + 3
Information Technology	Senior Certificate + 3
Municipal Administration	Senior Certificate + 3
Personnel Management	Senior Certificate + 3
Property Valuation	Senior Certificate + 3
Public Administration	Senior Certificate + 3
Public Management and Administration	Senior Certificate + 3
Safety Management Senior Certificate + 3	Senior Certificate + 3 Town and Regional Planning
Real Estates	
And other relevant Diplomas	

NATIONAL HIGHER DIPLOMAS:

Civil Engineering	Senior Certificate + 4
Commercial Practice	Senior Certificate + 4
Community Nursing Science	Senior Certificate + 4
Developmental Studies	Senior Certificate + 4
Environmental Health	Senior Certificate + 4
Fire Service Technology	Senior Certificate + 4
Internal Audit	
Information Technology	
Municipal Administration	
Personnel Management	
Property Valuation	
Public Administration	
Public Management and Administration	
Safety Management	
Town and Regional Planning	
And other relevant National Higher Diplomas	

OTHER DIPLOMAS AND CERTIFICATES:

Certificate: Disaster Management	
Diploma: Community Nursing Science	Senior Certificate + 4
Diploma: Developmental Studies	Senior Certificate + 3
Diploma: Engineering	Senior Certificate + 3
Diploma: Nursing Administration	Senior Certificate + 4
Masters Diploma: Fire Service Technology	Senior Certificate + 5

All applicable National Diplomas, National Higher Diplomas and B Tech Degrees UNIVERSITY TRAINING

ADMINISTRATION/PUBLIC ADMINISTRATION:

Admin Degree + 3	
Public Administration Hons.	One year additional above Bachelor's degree

AUXILIARY MEDICAL SERVICES:

B.A. (Cur.)

COMMERCE:

B.Com

B.Com (Hons.)

M.Com

B.Compt

Hons.B.Compt

ENGINEERING: B.Eng.

B.Eng. (Hons.) Degree + 5

TOWN AND REGIONAL PLANNING:

M. Town and Regional Planning Degree + 5

M. Urban Management Degree + 5

ARTS:

B.A. Degree + 3

B.A. Degree + 4

LAW:

B.A. Law Degree + 3

Law Matric Degree

LL.B. Degree + 5

Degree + 6

SOCIAL SCIENCE:

B.Soc.Sc (S.W.) (Social Work)

Degree + 4

B.A. (S.W.) (Social Work)

Degree + 5

B.Soc. Sc.Hons. (S.W.) (Social Science)

All applicable B Degrees, B Honours

PROFESSIONAL BODIES:

Designations & Qualifications CA IAC (SA)

Chartered Accountant (SA) +6

CA- SA Institute of Chartered Secretaries and Administrators + 4

CIA - Certified Information System Auditor + 5

CIA - Certified Internal Auditor + 4

Note In 2005 the Institute ceased with the provision of education as it could no longer obtain registration with the Department of Education and the Council for Higher Education and operated as a Professional Accounting and Management Institute.

On 1 January 2011 the IACSA once again changed its persona and became a Professional Accounting Institute only and now specialises in the registration of Accounting Officers in terms of section 60 of the Close Corporations Act. <http://www.iacsa.co.za/index.php?page=pages&pid=97>

IAC (SA) - Diploma in Accountancy Senior Certificate + 3

IAC (SA) - Diploma in Business Management Senior Certificate + 3

IAC (SA) - Diploma in Cost and Management Accounting Senior Certificate + 3

IAC (SA) - Diploma in Industrial Relations	Senior Certificate + 3
IAC (SA) - Diploma in Local Government: Admin	Senior Certificate + 3
IAC (SA) - Diploma in Local Government: Finance	Senior Certificate + 3
IMTA - Institute of Municipal Treasurers and Accountants Diploma	Senior Certificate + 5
Town Clerks of S.A. Institute	Senior Certificate + 3

Note. Acknowledging that in order to harmonise the profession of Municipal Managers, the Municipal Accounting Officers, therefore, agreed to constitute themselves as the Institute of South Africa. (Note dated as at 2015 please check for changes) Municipal Accounting Officers referred to by acronym as ISAMAO.

STUDY BURSARY AGREEMENT

SECTION 1.

NAME OF APPLICANT: _____

DESIGNATION: _____

DEPARTMENT: _____

YEARS OF EXPERIENCE WITHIN ULM: _____

CURRENT QUALIFICATIONS:

NQF LEVEL AND QUALIFICATION REQUIRED FOR YOUR JOB:

NQF LEVEL AND QUALIFICATION FOR WHICH BURSARY IS REQUIRED:

(HR TO VERIFY NQF LEVEL AND QUALIFICATION THROUGH INSTITUTION COURSE ATTACHMENT)

SECTION2.

HAVE YOU EVER RECEIVED A MUNICIPAL BURSARY BEFORE?: (YES/NO)

DID YOU FINISH THE COURSE FOR WHICH BURSARY WAS PAID?: (YES/NO)

**IF NOT, DID YOU REFUND THE EMPLOYER FOR THE UNPASSED OR UNFULFILLED MODULES?
(YES/NO)**

**SHOULD YOU BE FUNDED, DO YOU COMMIT THAT YOU DO NOT HAVE PRECONCIEVED
INTENTIONS TO VOLUNTARILY RESIGN UPON COMPLETION OF YOUR STUDIES WITHIN A YEAR?
(YES/NO)**

**SHOULD YOU RESIGN WITHIN A YEAR OF COMPLETION FOR WHICH BURSARY WAS PAID, DO YOU
AUTHORISE THE EMPLOYER TO RECOVER ITS LOSS? (YES/NO)**

SECTION 4.

MODULES TO BE UNDERTAKEN TO COMPLETE THE COURSE (APPLICANT TO ATTACH THE APPLICABLE LIST ON INSTITUTION DOCUMENT)

MODULES TO BE PAID ON YEAR 1 PLUS COST

MODULE NAME:	COST:
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

MODULES TO BE PAID ON YEAR 2 PLUS COST ESTIMATE (IF RELEVANT)

MODULE NAME:	COST:
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

MODULES TO BE PAID ON YEAR 3 PLUS COST ESTIMATE (IF RELEVANT)

MODULE NAME:	COST:
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

MODULES TO BE PAID ON YEAR 4 PLUS COST ESTIMATE (IF RELEVANT)

MODULE NAME:	COST:
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Section 5.

Comments by SDF:

Is this application covered in the SDP? (YES/NO)

Comments by the HR Manager:

Motivation by SUPERVISOR

Motivation by HOD

Special Leave Requirements

Section 6.

1. I hereby apply for a study bursary in accordance with the information as set out above.
2. I acknowledge that I am aware of the policy of Council in this regard and undertake to abide thereby.
3. Repayment certification in case of unpassed or unfulfilled courses or modules paid for

Section 7.

1. I hereby permit the employer to recover any portion of unpassed or unfulfilled course(s) or module(s).

2. This serves to affirm that I hereby understand that this bursary is a loan which shall be settled upon my qualification per module passed against cost and per qualification attainment against total bursary.

3. By taking out this bursary I subject myself to a decision by the employer at the employer's discretion not to recover its cost, should I not sit for examination or complete the qualification due to reasons beyond my control.

4. Furthermore I acknowledge that the employer has got no obligation to finance a failed module, that the employer at sole discretion may recover its cost immediately or permit a self-funded re-write where this is possible within reasonable time.

APPLICANT SIGNATURE: _____

DATE: _____

APPLICATION SUPPORTED/NOT SUPPORTED

SUPERVISOR: SIGNATURE _____

DATE: _____

APPLICATION RECOMMENDED/NOT RECOMMENDED

HEAD OF DEPARTMENT: _____

DATE: _____

BUDGET VERIFICATION (FUNDS AVAILABLE/NOT AVAILABLE)

AVAILABLE BUDGET: _____

BUDGET MANAGER: _____

COMMENTS BY THE CHIEF FINANCIAL OFFICER:

**AGREEMENT APPROVED/NOT APPROVED
MUNICIPAL MANAGER**

COMMENT(S) IF ANY: _____

NB. ALL AGREEMENTS SHALL BE FILED ON PERSONAL FINE AND APPLICANTS TO KEEP COPIES THEREOF.

ALL TRAININGS TO APPEAR IN THE SDP FOR THAT FINANCIAL YEAR

SDF OR RELEVANT OFFICIAL TO EXPLAIN THE AGREEMENT THOROUGHLY TO ALL APPLICANTS.