

OVERBERG DISTRICT MUNICIPALITY

BURSARY AND STUDY AID POLICY





Council Resolution No	:..... A175
Date	:..... 05.12.2017
Municipal Manager	:..... 
Executive Mayor	:..... 
Reference No	:..... 9/1/B
Municipal Code No	:..... P-B-04

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1. POLICY OBJECTIVE

The **Bursary and Study Aid Policy** is aimed at enabling learners, by means of financial assistance in the form of a bursary or study aid, to better qualify themselves.

2. QUALIFICATION REQUIREMENTS

- 2.1 The Municipality shall recognise only qualification standards that are South African Qualifications Authority [SAQA] accredited or which are compulsory in terms of legislation and are presented by recognised educational or academic institutions.
- 2.2 Recognised educational or academic institutions referred to in clause 2.1 shall be government and/or SAQA approved institutions such as:
- a South African University;
 - a South African University of Technology;
 - other degree/diploma granting institutions within South Africa;
 - a South African College; or
 - correspondence College/Technikons/University; or
 - e-learning institutions.
- 2.3 The courses or subjects selected for study shall be confined to the Municipality's working environment as well as the functional and career development activities of a specific employee.
- 2.4 The selected field of study should form part of the Skills Development section of the employees Performance Agreement or Performance Development Plan. This should be incorporated as part of the Workplace Skills Plan of the municipality. Consideration for training will only be at the discretion of the Director: Corporate Services or his/her delegated authority, after taking into account each employee's skills development plan contained in the performance agreement.
- 2.5 Should the request for study aid by an employee not comply with clause 2.3 above, such an employee will be required to submit a motivation for career change, supported by his/her Manager and Director, via the Director: Corporate Services or delegated authority, to the Municipal Manager and the latter will only favourably consider the application if such career change is in the interest of the Municipality.

3. CRITERIA FOR ALLOCATION OF STUDY AID

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

➤ *Priority Number One*

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

➤ *Priority Number Two*

As determined in the Workplace Skills Plan, Integrated Development Plan and Employment Equity Plan.
Budget availability.

➤ *Priority Number Three*

Employees who must obtain a qualification in order to meet the requirements
✓ of the post which they currently occupy; or
✓ to address developmental gaps for purposes of career pathing.
Budget availability.

➤ *Priority Number Four*

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

➤ *Priority Number Five*

Employees who already have tertiary qualifications but who are studying for self-development within the context of local government.
Budget availability

4. STUDY AID

- 4.1 The term "study aid" shall be deemed to be study fees for purposes of registration, class and examination fees, matriculation exemption fees and thesis fees but will not include any penalties imposed by the educational institution or membership of any student body.
- 4.2 The study fees shall be paid by the Municipality in full directly to the educational institution.
- 4.3 The employee must submit documentary proof, by means of a statement, account or invoice on which the study fees are fully specified and defined.
- 4.4 If an employee has paid the fees directly to the educational institution, he/she may claim reimbursement on submission of documentary proof of the said amount. Reimbursement claims may not be submitted later than three (3) calendar months after passing the examinations of the said subject/course.
- 4.5 Should an employee fail a subject/module in total (exams and re-examination), he/she will not receive any further study aid for that specific subject/module.
- 4.6 The Municipality will make no contribution in respect of prescribed books, equipment, stationery, class notes, travel and subsistence costs or tools. The provisions of this clause are not applicable on compulsory training of employees in terms of legislation. Council will only reimburse where the employee has a legal obligation towards the employees, with regard to training.
- 4.7 Exemption cost will not be paid by Council where employees who enrolled for a recognised course at a university and who must pay exemption fees for subjects/modules that were passed at another university.
- 4.8 Assistance to study for approved qualifications will be awarded to employees for a total period of not more than five years per qualification.

5. APPLICATION PROCEDURE

- 5.1 Study aid applications must be submitted on the prescribed form (Annexure A) obtainable from the Department: Human Resources.
- 5.2 Applications must be accompanied by a statement/certificate by the educational institution that the employee complies with the entrance requirements for the course concerned.
- 5.3 Study aid applications must be recommended for approval by the relevant Manager, via his/her Director, to the Director Corporate Services or his/her delegate.
- 5.4 Approval must be obtained at least two weeks prior to the closing date for submission. No late applications will be accepted after the closing date.

6. BURSARIES

- 6.1 The Municipality recognises the need for officials and members of the community to qualify them appropriately.
- 6.2 The Municipality therefore wishes to encourage officials and members of the community to undertake further studies.
- 6.4 The annual training budget of the Municipality shall make provision for bursaries.

7. EXAMINATION RESULTS

Employees will be obliged to submit their examination results to the Department: Human Resources within one month of receiving the said results. By failing this it shall be deemed that the subjects/modules were failed and in which case clause 4.5 shall apply.

8. EMPLOYEE OBLIGATION

- 8.1 Employees must enter into study aid agreements with the Municipality in terms of which the contractual relationship in terms of this policy is set out.
- 8.2 An employee will be required to remain in the Municipality's service for a period equal to the normal duration of the qualification obtained. This required period will come into effect annually on the date on which the last examination for that year was written. Where no examination was taken but a Master's thesis was submitted, the employee will be required to remain in the Municipality's service for one year after his/her thesis has been finally accepted.
- 8.3 Should an employee leave the Municipality's service within the timeframes mentioned in clause 8.2 for whatever reason, the employee must in full repay the amount of study aid to the Municipality. If an employee leave Council service for any reason whatsoever after assistance has been given and before the period within which he/she is required to remain in Council service as expired (including dismissal, but excluding death or legal inability to carry out duties), he/she will be liable for the immediate total repayment of all money that Council has paid on his/her behalf in terms of the study aid policy.

8.4 Should it be necessary to institute legal action to recover money, the employee will be liable for all such costs on a scale of attorney and client including interest at the current prime rate from the date on which such monies are due to the Municipality.

9. NO EXPECTATION

The finalization of any course of study shall not give rise to any right or expectation of automatic promotion, increase in salary or any other benefit.

10. EFFECTIVE DATE

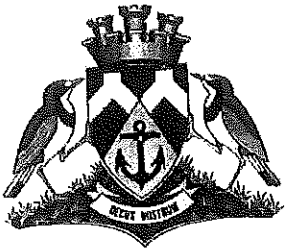
This policy shall come into effect on the date which it was adopted by Council and shall remain in full force and effect until it is reviewed, revoked or amended by Council.

11. ROLES

- The policy applies to all employees, with the following exceptions –
- This policy excludes all section 57 employees.

12. RELATED POLICIES/LEGISLATION

Collective Agreement on Conditions of Service for the Western Cape of the SALGBC
Basic Conditions of Employment Act, 75 of 1997 (as amended)



OVERBERG

DISTRIKSMUNISIPALITEIT DISTRICT MUNICIPALITY UMASIPALA WESITHILI

STUDY AID APPLICATION

(New applications as well as current learners)

New Application (mark with X)	Application for continuation of already granted study aid (mark with X) Attach examination results
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Personal Information

1	Name and Surname	
2	Address	
3	ID number	
4	Position	
5	Department	
6	Date appointed	

1	Qualification to be obtained (SAQA number)	
2	Name of Training Institution	
3	Subjects	1. 2. 3. 4. 5.
4	Duration of Training	
5	Total cost of training (Attach proof)	

Declaration:

I hereby declare that all the above information is true and that I will follow the study field, as indicated. I undertake to sign and abide to the agreement as prescribed by the Bursary and Study Aid Policy of the Overberg District Municipality.

I also confirm that I am fully familiar with the content and conditions of the Bursary and Study Aid Policy.

Signed at _____ on _____ 20____.

Signature of Applicant



OVERBERG

DISTRIKSMUNISIPALITEIT
DISTRICT MUNICIPALITY
UMASIPALA WESITHILI

PRIVATE AND CONFIDENTIAL

ENTERED INTO BETWEEN

OVERBERG DISTRICT MUNICIPALITY

(Here after called the "COUNCIL")

AND

(full names)

(Identity number)

(Here after called the "EMPLOYEE")

**THE ABOVEMENTIONED PARTIES AGREE THAT THE PROVISION OF STUDY AID
WILL BE SUBJECT TO THE FOLLOWING:**

Council approves to provide study aid for the amount of R _____ to the Employee, to enable him/her to obtain the qualification of _____ from the _____ (Training Institution).

THE PARTIES AGREE AS FOLLOWS :

1. This contract is only valid for one year.
2. The employee must apply for study aid at the end of every academic year. The application will be considered according to the guidelines as per the Bursary and Study Aid Policy.
3. The amount of R _____ for this academic year will be paid according the guidelines of the Bursary and Study Aid Policy.
4. The Employee agrees to submit examination results as per clause 7 of the Bursary and Study Aid Policy.
5. The Employee agrees to stay in service of the Council as per clause 8 of the Bursary and Study Aid Policy, if the employee left service before the specific time, the Employee will pay a pro-rata amount back to Council.
6. If the Employee left the employment of Council before the specific period he/she must work as per agreement, the Employee agree to pay the remaining time pro-rata back to Council.
7. The Employee agrees by signing this agreement that the remaining pro-rata amount, if any, may be deducted from his/her salary, leave days, any other money to be paid out by the Employer at the end of service.
8. If the Employee does not pass during the examination and also re-examination, no more study aid will be granted for that specific subject.
9. The Employee confirm that he/she is fully aware of the Bursary and Study Aid Policy and agrees to all processes and procedures contained in the policy.

Signed at _____ on _____ 20____.

SIGNATURE OF EMPLOYEE

Signature of Witness

MUNICIPAL MANAGER

Signature of Witness



**OVERBERG DISTRICT
MUNICIPALITY**

**Bursary Application Form
2017**

INSTRUCTIONS

1. Read carefully before completing, signing or submitting this form.
2. Ensure that this form is completed in full.
3. Complete in BLOCK LETTERS.
4. Note that this bursary cannot be used to pay for existing loans or debts.
5. Only first time entrants to an accredited Institution of Higher Learning will be legible for this financial assistance.

Criteria:

1. Ensure that this form is duly signed.
2. Application forms with incomplete information will be disqualified.
3. Application forms with incorrect information will lead to your application being disqualified.
4. No faxed application forms will be accepted.

Ensure that you meet the following:

1. Attach ALL of the following documents **REQUIRED**:

- 1.1 Certified copy of a valid senior certificate (if you have completed Grade 12).
- 1.2 Certified copy of a valid South African identity document.
- 1.3 Certified copy of family members Identity document (Section E).
- 1.4 Proof of income of both parents (original document).
- 1.5 Affidavit to attest unemployment status and/or lack of income.
- 1.6 Applications received after the closing date will not be considered.

Post completed forms or hand deliver to:

Post to:	Hand delivers to:
Human Recourses	Overberg District Municipality
Overberg District Municipality	26 Long Street
Private bag X 22	Bredasdorp
Bredasdorp	7280
7280	
For the attention of: Ms G Spangenberg	For the attention of: Ms G Spangenberg

SECTION A- PERSONAL DETAILS OF APPLICANT

1. Surname: _____

2. First names: _____

3. Date of birth: _____

4. Place of residence: _____

5. Identity No: _____

6. SA Citizenship: Yes No

7. Gender: Male Female

8. Race: African Indian Coloured White

9. Do you have a disability: Yes No

If YES, describe the nature of the disability: _____

10. Residential address with postal code: _____

Code: _____

11. Postal address with postal code: _____

Code: _____

12. Contact telephone numbers including dialling codes:

Cellular: _____ Parent/Guardian: _____

Other Contacts: _____ Email address: _____

13. Have you ever been found guilty of a criminal offence? Yes No

If YES, please specify the nature and date of offence: _____

SECTION B- HIGH SCHOOL ATTENDED

1. Name of school: _____

2. School address: _____

Postal code: _____

3. Local Municipality: _____ Town: _____

4. Grade: Currently in Grade 12 Completed Grade 12

5. Years attended From: _____ To _____

6. **Subjects (List them Below)**

Subject	Grade	Symbol	Percentage

NB: Attached proof of the latest results.

SECTION C – INTENDED TERTIARY STUDY FOR THE NEW ACADEMIC YEAR

1. Name of qualification: _____

2. Name of Institution: _____

3. Field/Area of study: _____

4. Period of study in years: _____

5. Are you receiving any other bursaries or loan? Yes No

If YES, describe below the nature of financial assistance and any obligations involved and provide the name of the institution that granted the bursary/loan assistance: _____

(Please attached proof of admission to accredited tertiary institution)

SECTION D – DETAILS ABOUT PARENT(S) / GUARDIAN(S) / NEXT OF KIN

1. Surname: _____
2. First names: _____
3. Identity No: _____
4. Relationship: Mother Father Other Specify: _____
5. Residential address with postal code : _____

Code: _____

6. Postal address with postal code : _____

Code: _____

7. Contact telephone numbers including dialling codes : _____

Home Cellular: _____ Work: _____ Other: _____

Email address: _____

EMPLOYMENT DETAILS: OF HEAD OF THE HOUSEHOLD

8. Name of employer: _____

9. Date of employment: _____

10. Position: _____

11. Monthly Salary: _____

12. Address of Employer: _____

Code: _____

13. Contact telephone details of Employer: _____

SECTION E – DETAILS OF FAMILY

Please list those who are dependent on the family's income (stated below) start with yourself, followed by your spouse (if any) and then any other dependants.

Note:

If the person received income from more than one source, please list them all. If the income is from wages or a salary, please submit a copy of the latest pay slip with this application. If the income is from the profit of a business, please submit a copy of the official financial statement of the business submitted to the tax authorities, last year. If the income is from child support as a result of a divorce, please supply a copy of the relevant sections of the divorce documents.

Name	Age	How is this person related to you (e.g. wife, son)	Please state: Employment, Scholar, Student, unemployed, etc	If not employed state how income is derived / family is supported (Attach proof of retrenchment/ unemployment, etc)	Source of income i.e. Wages? Salary? Pension? Child support? Interest on investments? Business profit?	How much does the person receives from this source each month? Proof of all income must be provide. (See the note at the foot of the page.)

Note 1:

- If you are married, widowed or divorced, or
- If you have supported yourself for more than 3 years, or
- Both your parents are deceased, then please complete section E as the head of the household.

Note2:

- Please attach identity documents, pay slips or business statements of each of the members listed above
- If a member is unemployed and has no source of income, affidavit must be attached to attest such

SECTION F – DECLARATION

1. I hereby, declare that **ALL** the information provided in this application form is complete and correct.
2. I hereby, acknowledge that if **ANY** of the information provided in this application form is found to be incomplete and/or incorrect, my application will be disqualified.

3. Signature of

APPLICANT: _____

Name: _____

Date: _____

4. Signature of

PARENT / LEGAL GUARDIAN: _____

Name: _____

Date: _____

EXTRACT FROM THE COUNCIL MINUTES HELD ON 5 DECEMBER 2017

Item A175. 05.12.2017

APPROVAL HUMAN RESOURCE POLICIES

(Ref: 9/1/B)

JCP Tesselaar: Director Management Services / CFO

PURPOSE

To seek Council's approval for the proposed changes to review- and new Human Resources related policies.

BACKGROUND

During a LLF meeting held on 29 February 2016 and 6 April 2016, as well as a Workshop held on 8 May 2017 with both Unions, the following policies were finalised for submission to Council for final approval.

- Substance Abuse Policy
- Sexual Harassment Policy
- Bursary and Study Aid Policy
- Financial Support for Driving Lessons

LEGAL REQUIREMENTS

- It is necessary from time to time to review and consider new Human Resources Policies

The policies are attached in the Corporate and IGR portfolio agenda from pages 82 – 111.

UNANIMOUSLY RESOLVED : (Proposed by Cllr M Opperman and seconded by Cllr H Coetzee)

The revised Human Resources related policies (2017/2018) was approved by Council.

- a) Substance Abuse Policy
- b) Sexual Harassment Policy
- c) Bursary and Study Aid Policy
- d) Financial Support for Driving Lessons