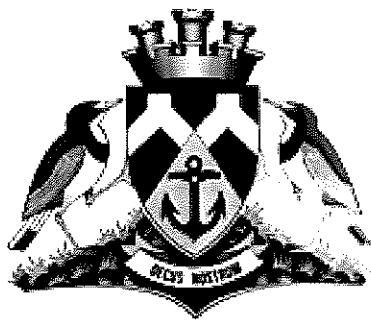


OVERBERG

DISTRIKSMUNISIPALITEIT
DISTRICT MUNICIPALITY
UMASIPALA WESITHILI



STUDY AID POLICY

Council Resolution No:

A 159

Date:

28-06-2021

Reference No:

9/1/B

Municipal Code No:

TABLE OF CONTENT

Page

1. Policy Objective3

2. Qualification Requirements.....3

3. Criteria for Allocation of Study Aid.....3

4. ~~Study Aid~~Payment of Study Fees : Requirements4

5. Application Procedure.....5

6. Payment of Fees
~~Bursaries~~.....5

7. Examination Results..... 5

8. Employee Obligation5

9. No Expectation6

10. Effective Date6

11. Roles6

12. Related policies/legislation.....6

13. Annexure A7

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1. POLICY OBJECTIVE

The ~~Bursary and Study Aid Policy~~ is aimed at enabling employees of the ODM 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~~ Senior Manager: 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 ~~Senior Manager: 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. Once the Municipal Manager has authorized the motivation, the application may be processed in terms of the procedure described in clause 2.3 above.

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. PAYMENT OF FEES: REQUIREMENTS 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. No fees will be paid directly to employees.

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.~~

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4.5 ~~4.4~~ 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 registration fees, prescribed books, equipment, stationery, class notes, travel and subsistence costs or tools. The provisions of this clause is are not applicable to 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 three (3) five years per qualification, provided that the employee applies for study aid for each year of study and when the employer calls for applications.

5. APPLICATION PROCEDURE

5.1 In the event that funds are available for study aid, the employer will send out an advertisement to all employees and advertise on municipal notice boards.

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5.15.2 Study aid applications must be submitted on the prescribed form (Annexure A) obtainable from the Department: Human Resources.

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

5.35.4 Study aid applications must be recommended for approval by the relevant Manager / Head of Department, via his/her Director, to the Senior Manager Director-Corporate Services or his/her delegated authority.

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5.5 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.

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5.6 Applications that comply with the set requirements for Study Aid will be considered by a panel consisting of:

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5.3.1 The Chief Financial Officer;

5.3.2 The Director: Community Services; and

5.3.3 The Senior Manager: Corporate Services

5.45.7 Union representatives will be allowed observer status at the meeting where the allocation of study aid will be discussed by the panel mentioned in paragraph 5.5 above.

5. 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.

6. PAYMENT OF FEES

6.1 The employer will pay the study fees of the employee directly to the institution and on presentation of proof of fees owing.

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6.2 No direct payments will be made to employees who have been awarded study aid.

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6-7. 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.

7-8. EMPLOYEE OBLIGATION

~~7-18.1~~ 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. The agreement is attached as Annexure B.

~~7-28.2~~ 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.

~~7-38.3~~ Should an employee leave the Municipality's service within the timeframes mentioned in clause ~~88.2~~ 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.

~~7-48.4~~ 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.

8-9. 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.

9-10. 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.

10-11. ROLES

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

11-12. 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)
Skills Development Act, 97 of 1998

Annexure A



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Annexure A

STUDY AID APPLICATION

(New applications as well as current learners)

<input type="checkbox"/> New Application (mark with X)	<input type="checkbox"/> Application for continuation of already granted study aid (mark with X) Attach examination results
--	--

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



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UMASIPALA WESITHILI

OVERBERG

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~~ 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~~ and 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

Item A159. 28.06.2021

HUMAN RESOURCE POLICIES

L Potgieter: Senior Manager: Corporate Services

(Ref.:9/1/B)

PURPOSE

To recommend new and amended policies to Council. .

BACKGROUND

Several Human Resources Policy Workshops were held during April and May 2021. The following policies were reviewed:

- Occupational Health and Safety Policy
- Dress Code Policy
- Study Aid and Bursary Policy

DISCUSSION

The following amendments were suggested:

- (a) **Occupational Health and Safety Policy:** the most significant changes were made to Annexure A of the policy. One of the proposed changes is the transportation of employees who had been injured at work, for purposes of visiting specialists whilst under treatment for the injury.
- (b) **Dress Code Policy:** Reviews to the existing policy include provision for cultural and religious diversity in dress code.
- (c) **Bursary and Study Aid Policy:** As a result of the confusion between external bursaries and study aid, it was decided to compile two (2) separate policies. Reference was also made to the Director: Corporate Services, as the delegated authority to sign off Study Aid, whilst that position had been abolished and replaced with the Senior Manager: Corporate Services. The two policies are:
 - o External Bursary Policy; and
 - o Study Aid Policy

The major difference between the two policies is that whereas the External Bursary Policy deals with the allocation of bursaries and funding for studies received by external donors for students and learners wishing to continue their studies, the Study Aid Policy deals specifically with financial assistance for employees of the ODM wishing to further their studies in order to enhance their own careers. In order to ensure transparency in the allocation of bursaries and study aid, a committee consisting of employees and / or Councillors as the case may be, is proposed.

LEGISLATIVE FRAMEWORK

Occupational Health and Safety Act, 85 of 1993.
Skills Development Act, 97 of 1998

FINANCIAL IMPLICATIONS

None

PERSONNEL IMPLICATIONS

None

ATTACHMENTS

- Annexure A: **Occupational Health and Safety Policy**
- Annexure B: **Dress Code Policy**
- Annexure C: **External Bursary Policy**
- Annexure D: **Study Aid Policy**

RECOMMENDATION

1. That the following policies be approved for submission to Council:
 - a. Occupational Health and Safety Policy (amended)
 - b. Dress Code Policy (amended)
 - c. External Bursary Policy (new)
 - d. Study Aid Policy (new)