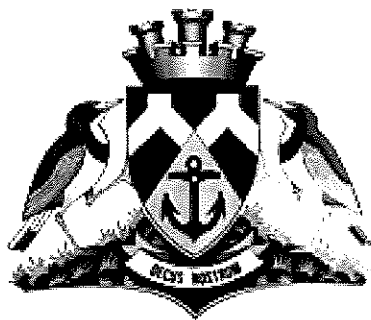


# OVERBERG

DISTRIKSMUNISIPALITEIT  
DISTRICT MUNICIPALITY  
UMASIPALA WESITHILI



## BURSARY POLICY

Council Resolution No:	A 159
Date:	28-06-2021
Reference No:	9/1/B
Municipal Code No:	P-B-04.1

**TABLE OF CONTENT**

**Page**

1. Policy Objective .....3

2. Qualification Requirements.....3

3. Criteria for Allocation of External Bursaries

3. Application Procedure Study  
Aid.....3

5. Study Aid  
.....4

7.4. Application  
Procedure.....5

8.5. Allocation of External  
Bursaries Bursaries.....5

6. Examination Results Obligation of Bursary  
Holders.....5

9.

11.7. Employee Obligation Payment of fees  
.....5

12.8. No -Expectation .....6

13.9. Effective Date .....6

14. Roles .....6

16.10. Related policies/legislation .....6

17. Annexure -A .....7

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#### **42.1. POLICY OBJECTIVE**

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

The Municipality recognises the need for members of the community to qualify themselves appropriately. The Municipality therefore wishes to encourage members of the community to undertake further studies, especially members from previously disadvantaged groups within the community of the Overberg District Municipality.

External bursaries are funded by external organisations, for example SETA's, Government Departments (for example National Treasury), and the private sector.

Beneficiaries of external bursaries administered by the Overberg District Municipality are usually learners and students from local communities, and not necessarily employees from the Overberg District Municipality.

## **13.2. QUALIFICATION REQUIREMENTS**

- 13.12.1** 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 requirements of the various external donors of the bursaries. 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 EXTERNAL BURSARIES**

**3.1** Criteria for the allocation of external bursaries are usually set by the donors of the bursaries.

**3.2** In the absence of pre-set criteria by donors, the Employer will set criteria that is fair and objective and aimed at advancing previously disadvantaged students and learners within the boundaries of the Overberg District Municipality.

## **14. CRITERIA FOR ALLOCATION OF STUDY AID**

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

➤ *Priority Number One*

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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~~

#### ~~46. STUDY AID~~

~~48.0 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.~~

~~3.2 The employee must submit documentary proof, by means of a statement, account or  
invoice on which the study fees are fully specified and defined.~~

~~3.2 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.~~

~~3.2 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.~~

#### **66.4 APPLICATION PROCEDURE**

~~4.1 External bursaries will be advertised on municipal notice boards of municipalities in the district, on the ODM's website, at schools in the district and other educational institutions in the district as well as in the community. Donors may prescribe the content of advertisements.~~

~~4.2 The advertisement must set out the application procedure, preferred fields of study and preferred applicants (for e.g. applicants from previously disadvantaged communities). In addition, the advertisement must state what documentation and information must be submitted with the application.~~

~~4.3 Incomplete applications and applications received after the closing date will not be considered.~~

~~66.14.4 Study aid Applications must be submitted on the prescribed form (Annexure A)-obtainable from the Department: Human Resources. The application form is attached as Annexure A.~~

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

~~66.2 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.~~

~~66.2 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.~~

#### **66. 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.~~

#### **5. ALLOCATION OF EXTERNAL BURSARIES**

~~5.1 All applications which comply with the requirements of the advertisement and that set by the donor of an external bursary, will be considered by a panel consisting of:~~

~~5.1.1 The Chairperson: Corporate Services Portfolio Committee;~~

~~5.1.2 The Chairperson: Finance Portfolio Committee~~

~~5.1.3 The Chief Financial Officer;~~

~~5.1.4 The Director: Community Services~~

~~5.1.5 The Senior Manager: Corporate Services~~

~~5.1.6 Representatives of SAMWU & IMATU will be allowed observer status.~~

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5.2 In the process of allocation, the panel described in 6.1 above must:

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5.2.1 Take cognisance of the criteria for allocation which may be prescribed by the donors of external bursaries, bearing in mind that some external donors may have their own unique allocation processes, eg. LGSETA.

5.2.2 In the case of the Provincial Government being the donor, the conditions prescribed in the Provincial Gazette published together with the grant allocations and the Memorandum of Understanding, must be adhered to.

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5.2.3 The academic performance of applicants.

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5.2.4 The need to assist learners and students from local communities within the Overberg District.

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5.3 Successful applicants will be required to sign an undertaking with the ODM that they will abide by the criteria set by the external donors and the requirements set by the ODM as described in paragraph 7 below.

5.4 Depending on the availability of funds, external bursaries may be allocated for the duration of the studies of a successful applicant, provided that the applicant's academic progress meets the requirements of the policy in each year of study.

5.5 Avoid conflict of interest and ensure that the allocation of external bursaries are done in a manner that does not give raise to allegations of nepotism.

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## 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.

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## 6. EMPLOYEE OBLIGATION OF BURSARY HOLDERS

6.1 Once a bursary is awarded, the successful applicant must sign an agreement with the ODM.

7.1 Successful applicants 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 the student would have deemed to have failed and any further financial assistance will be stopped.

6.2

## 7. PAYMENT OF FEES

7.1 Tuition and boarding / residence fees will be paid directly to the institution.

7.2 Payment of study material, textbooks, transportation and registration fees will be made upon presentation of an invoice

7.3 No refunds will be paid directly to students.

67.2 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.

~~67.4 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.~~

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~~67.6 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.~~

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~~67.8 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.~~

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#### 68.8. NO EXPECTATION

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

#### 69.9. 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.

#### ROLES

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

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#### 74.10. RELATED POLICIES/LEGISLATION

Skills Development Act, 97 of 1998  
Collective Agreement on Conditions of Service for the Western Cape of the SALGBC  
Basic Conditions of Employment Act, 75 of 1997 (as amended)

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**OVERBERG DISTRICT**  
**MUNICIPALITY**

**ANNEXURE A**  
**Bursary Application Form**

## **INSTRUCTIONS**

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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:

<b>Post to:</b>	<b>Hand delivers to:</b>
<b>Human Recourses</b>	<b>Overberg District Municipality</b>
<b>Overberg District Municipality</b>	<b>26 Long Street</b>

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7280	
For the attention of:	For the attention of:

**SECTION A- PERSONAL DETAILS OF APPLICANT**

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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: \_\_\_\_\_

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 dependents.

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 retraining/unemployment, etc)	Source of income i.e. Wages? Salary? Pension? Child support? Interest on investments? Business profit?	How much does the person receive from this source each month? Proof of all income must be provided. (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.

Note 2:

- 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: .....

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APPLICANT: \_\_\_\_\_

\_\_\_\_\_  
Name: \_\_\_\_\_

\_\_\_\_\_  
Date: \_\_\_\_\_

4. Signature of:

PARENT / LEGAL GUARDIAN: \_\_\_\_\_

\_\_\_\_\_  
Name: \_\_\_\_\_

\_\_\_\_\_  
Date: \_\_\_\_\_

Annexure A

**DISTRIKSMUNISIPALITEIT  
DISTRICT MUNICIPALITY  
UMASIPALA WESITHILI**



OVERBERG \_\_\_\_\_

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**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

\_\_\_\_\_



**OVER**

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

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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)