 **KAREEBERG MUNICIPALITY**

Volhoubare ontwikkeling

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, excluding senior managers, 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

1. **POLICY SCOPE**

This policy applies to all municipal employees.

1. **POLICY DEFINITION**

The following definition is applicable to this policy:

“**assistance”** means to provide somebody or something with help or with what is needed to achieve something.

1. **LEGISLATIVE FRAMEWORK**

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

South African Qualification Authority Act, 58 of 1995 (this lays the foundation for the National Qualification Framework (NQF)

National Qualifications Framework (NQF)

Employment Equity Act, No. 55 of 1998.

This policy must be read concomitant with the Municipality’s:

Performance Management System

Employment Equity Plan and

Workplace Skills Plan.

1. **GENERAL POLICY PROVISIONS**

The following sections reflect the provisions of this policy:

* 1. Qualifying Requirements

In the normal course of events Council shall recognise only qualification standards that are recognised by the Human Sciences Research Council and that take place at statutory recognised educational or academic institutions. However, Departmental Heads may after joint sessions approve qualifications that are recognised by the HSRC, 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 / MMC / CPMD.

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.

* 1. 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.
* Priority Number Five - Employees who are studying for self-development within the context of local government and public service in general.
  1. Application Procedure for Bursary

Application or study bursaries must be done on the attached form (Annexure A) prescribed for all courses including MMC 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 including the Municipal Manager 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.

* 1. 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.

* 1. 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.**

A maximum of R10 000.00 per year per employee shall be paid.

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.

1. **SPECIAL STUDY LEAVE** 
   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.

6.1.2 Collective agreement

* 1. 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.

1. **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".

1. **EXAMINATION RESULTS**

**Employees will be obliged to submit their examination results to the Human Resources Division who will submit the results to the Municipal Manager 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.**

1. **EMPLOYEE OBLIGATIONS** 
   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).**

1. **WITHDRAWAL OF ASSISTANCE**

If in the first year 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.

1. **EMPLOYEE UNDERTAKING**

1. **Applications for study aid must be submitted on the form prescribed for this purpose.The form must be submitted directly to the Human Resources Division (after approval has been obtained from the Municipal Manager) at least three weeks before the closing date for registration.**
2. **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 Chief Financial Officer 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.**

1. **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.**

1. **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 evaluate

by the municipality. The alignment of the data with the Municipality’s Performance

Management System, Employment Equity Plan and Workplace Skills Plan.

1. **COMMENCEMENT**

This policy takes effect on 1 January 2021.

**ANNEXURE A**

**APPLICATION FOR STUDY AID**

**Please answer all questions in your own handwriting. Where appropriate, the appropriate block with a cross (x) marked. The information is strictly confidential. Complete completely please**

Title (eg. Mr, Mrs, etc) …………………… Surname ………..……………...........…............

First Name…………………………………… Nic Name ……….……………...........………..…

Postal Address ……………………………………… Postal Code ...................

Residential Address …………………………………… Postal Code ..……..........

Tel (home) code …….. no ....…….……......(work) code ……… no ………..........

What academic year do you apply for? ..…………………………………

1. **PERSONAL**
   1. Date of Birth …………………...……....…..........…………………………
   2. Identity number …………………...……....…..........………………………
   3. Marital status ( Unmarried / Married / Widowed / Divorced )

Date of the above ………………………………………..........………

* 1. Dependents ( children and others – report ages )

………………….……..............……………………………….…………….…

1. **QUALIFICATIONS**
   1. ***Highest School Qualifications***
2. Location ………………………………………………………..........…………

(b) Successfully passed……………………… (c) Year ….…………….

* 1. ***Post Graduate Qualifications already obtained ( If any )***

**A**

|  |  |
| --- | --- |
| Name of Institute /  Institution |  |
| Year |  |
| Qualifications Obtained |  |
|  |

**B**

|  |  |
| --- | --- |
| Name of Institute /  Institution |  |
| Year |  |
| Qualifications Obtained |  |
|  |

**C**

|  |  |
| --- | --- |
| Name of Institute /  Institution |  |
| Year |  |
| Qualifications Obtained |  |
|  |

* 1. ***Postgraduate Qualification for which study assistance is applied***

|  |  |  |  |
| --- | --- | --- | --- |
| Name of Institute /  Wherever you want to study or already studying |  | | |
| What course do you apply for/ Request study aid? |  | | |
| The duration of the course? |  | | |
| Year of first entry. If applicable |  | Student  number |  |
| Years already completed (If any, attach results) |  | | |
| In what academic year are you currently. |  | | |
| Have you repeated any year |  | When |  |
| Indicate the subjects you have to follow |  | | |
|  | | |
|  | | |
|  | | |
|  | | |
|  | | |
|  | | |
| **NB!! PLEASE ATTACHED EVIDENCE OF AUTHORIZATION AND LATEST RESULTS** | | | |

* 1. ***Estimated cost of course for the year***

|  |  |
| --- | --- |
| Registration |  |
| Tuition fees |  |
| Estimates for text books |  |
| Fares |  |
| Accomodation Fees |  |
| ***TOTAL AMOUNT*** |  |

**\* Only ………………………… fees are paid in compliance with the Study Aid and Leave Policy**

* 1. ***Study Assistance Information***

|  |  |  |  |
| --- | --- | --- | --- |
| Have you previously applied for study assistance at Kareeberg Municipality? | | YES | NO |
| Was this successful? | | YES | NO |
| Which year? | |  | |
| Do you get any study aid? |  | | |
| At which institution? |  | | |
| How much is the amount? |  | | |

1. **WORK DETAILS OF APPLICANT**

|  |  |
| --- | --- |
| Position you currently hold? |  |
| In which section /  Department |  |
| Gross Salary |  |
| Netto salary |  |

1. **STATEMENT**

I understand that all information that I provided to Kareeberg Municipality and in particular the information I provided herein will form the basis of any approval that may be given by Kareeberg Municipality and have the right to terminate my study assistance if information is untrue or disgusted.

**APPROVAL: 31 MAY 2021 ACTING MUNICIPAL MANAGER**