

OVERSTRAND MUNICIPALITY

STUDY AID POLICY FOR EMPLOYEES

1. OBJECTIVES

The Overstrand Municipality's [Municipality] **Study Aid Policy for Employees** [the policy] is aimed at enabling full-time municipal employees to, by means of financial assistance in the form of study aid, undergo formal part-time study or training in order to enable such employees to better qualify themselves for posts on the Municipality's staff establishment.

This policy must be read concomitant with the Municipality's

- Performance Management System;
- Rewards and Incentives Policy;
- Employment Equity Plan and
- Workplace Skills Plan.

2. QUALIFYING REQUIREMENTS

2.1 In the normal course of events the Municipality shall recognise only qualification standards that are recognised by the South African Qualifications Authority [SAQA] or which are compulsory in terms of legislation and are presented by recognised educational or academic institutions. However, the Municipal Manager may approve qualifications that are not recognised by SAQA but which are in the Municipality's general interest.

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
- any other appropriate institution as approved the Municipal Manager.

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 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: Management Services, 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 prioritised according the following criteria:

- *Priority Number One*
Employees who are current study aid holders and must still complete their studies.

- *Priority Number Two*
As determined in the Workplace Skills Plan, Integrated Development Plan and Employment Equity Plan.

- *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.

- *Priority Number Four*
Employees who want to study towards their first qualification up to and including Grade 12.

- *Priority Number Five*
Employees who already have tertiary qualifications but who are studying for self development within the context of local government.

4. APPLICATION PROCEDURE FOR STUDY AID

- 4.1 Study aid applications must be submitted on the prescribed form obtainable from the Department: Human Resources.

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

- 4.3 Study aid applications must be recommended for approval by the relevant Manager, via his/her Director, to the Municipal Manager or his/her delegatee.

- 4.4 Employees will be allowed to simultaneously register for two study courses in the same year.

5. STUDY AID

- 5.1 The term “study aid” shall be deemed to be study fees for purposes of registration, class and examination fees but will not include any penalties imposed by the educational institution or membership of any student body.
- 5.2 The study fees shall be paid by the Municipality in full directly to the educational institution.
- 5.3 The employee must submit documentary proof, by means of a statement, account or invoice on which the study fees are fully specified and defined.
- 5.4 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 six calendar months after passing the examinations of the said subject/course.
- 5.5 Should an employee fail a subject/module, he/she must repay the fees in respect of the subject/module failed within a maximum period of 12 (twelve) months in equal monthly payments to the Municipality. The employee may however, after the subject/module was obtained at his/her own cost, claim reimbursement for the relevant fees in respect of said subject/module.
- 5.6 Save for an annual amount determined by the Municipal Manager to be paid towards prescribed book fees, the Municipality will make no contribution in respect of other 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.

6. EXAMINATION RESULTS

Employees will be obliged to submit their examination results to the Department: Human Resources within one month of receiving the said results failing which it shall be deemed that the subjects/modules were failed and in which case clause 5.5 shall apply.

7. EMPLOYEE OBLIGATIONS

- 7.1 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.
- 7.2 An employee will be required to remain in the Municipality's service for a period of one year for each year for which study aid was granted. 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.
- 7.3 Should an employee leave the Municipality's service within the timeframes mentioned in clauses 5.5 or 7.2 for whatever reason but excluding in circumstances where an employee is declared medical unfit for service, the employee must pro rata repay the amount of study aid to the Municipality in full.
- 7.4 Should it be necessary to institute legal action to recover money in terms of clause 7.3, 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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