



CAPE WINELANDS DISTRICT
MUNICIPALITY • MUNISIPALITEIT • UMASIPALA

EMPLOYEE STUDY AID AND LEAVE POLICY

**POLICY ADOPTED BY COUNCIL ON 3 December 2013
AT ITEM C.14.3**

1. OBJECTIVES

Council's study aid and leave policy is aimed at:

- 1.1 Enabling full-time Council employees to undergo formal part-time study, by means of financial assistance in the form of a study aid bursary and/or leave concessions in order to enable its employees to better qualify themselves for posts on Council's staff establishment and to facilitate personnel development.
- 1.2 Identifying expertise that Council has a need for and to develop this to the benefit of Council to 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.

2. QUALIFYING REQUIREMENTS

- 2.1 In the normal course of events Council shall recognise only qualification standards that take place at statutory recognised educational or academic institutions. However, Departmental Heads may recommend qualifications that are in Council's general interest.
- 2.2 Recognised educational or academic institutions where it appears in this policy shall be taken to refer to one of the following:
 - (a) South African University;
 - (b) South African University of Technology;
 - (c) South African Technical College or a Technical institution;
 - (d) South African Correspondence College;
 - (e) A government / SAQA approved institution; and/or
 - (f) Any other appropriate institution as approved by the Municipal Manager.
- 2.3 The courses or subjects selected shall be confined to those courses directly linked to operational activities of the Cape Winelands District Municipality (CWDM), especially as espoused in the Integrated Development Plan.
- 2.4 The courses or subjects selected shall be confined to the Cape Winelands District Municipality (CWDM) working environment, as well as the functional and career development activities of specific employees.
- 2.5 Should the request for a study aid bursary and/or study leave 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 Cape Winelands District Municipality (CWDM).

3. CRITERIA FOR ALLOCATION OF STUDY AID

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

(a) Subject to availability of funds.

(b) All studies must be undertaken at an approved institution (within South African borders), unless otherwise decided by the Municipal Manager.

(i) Priority Number One

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

(ii) Priority Number Two

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

(iii) Priority Number Three

Employees who must obtain a qualification in order to meet the minimum requirements of the post which they currently occupy.

(iv) Priority Number Four

As determined in the Workplace Skills Plan, Integrated Development Plan and/or Employment Equity Plan.

(v) Priority Number Five

Employees who are studying for self development within the context of local government and public service in general.

3.2 Applications for study aid will only be considered in respect of the following qualification types as promulgated in General Notice 1040 of 2012 published in Government Gazette No 36003 of 14 December 2012:

- | | |
|------------------------------|---------------|
| (a) General Certificate | (NQF Level 1) |
| (b) Elementary Certificate | (NQF Level 2) |
| (c) Intermediate Certificate | (NQF Level 3) |
| (d) National Certificate | (NQF Level 4) |
| (e) Higher Certificate | (NQF Level 5) |
| (f) Advanced Certificate | (NQF Level 6) |
| (g) Diploma | (NQF Level 6) |
| (h) Advanced Diploma | (NQF Level 7) |
| (i) Bachelor's Degree | (NQF Level 7) |

4. APPLICATION PROCEDURE

- 4.1 Application for financial assistance in the form of a study aid bursary and/or study leave concessions must be done on the form prescribed for this purpose and must be completed in full by the employee. Application forms and agreements are available from the Human Resources Division on request.
- 4.2 Departmental Heads must recommend the study aid and/or study leave application in terms of the qualifying requirements.
- 4.3 Study aid and/or study leave applications must be properly motivated and be recommended by the Head of the Department for the approval by the Senior Manager: Strategic Support Services.
- 4.4 Departmental Heads must take into account the subsequent study leave implications of recommended study aid and/or study leave applications in terms of service delivery and operational requirements.
- 4.5 Completed application forms, inclusive of the required recommendations, must be submitted to the Senior Manager: Strategic Support Services on/or before the closing date.
- 4.6 Applications must be accompanied by a statement/certificate by the educational institution that the employee complies with the entrance requirements for the course concerned.
- 4.7 An employee who has been awarded financial assistance and/or study leave in terms of Council's study aid scheme, by completing the application form and agreement 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 in equal instalments over a maximum period of six (6) months.

5. STUDY FEES

- 5.1 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 and/or professional body. Council will pay the study fees in full directly to the educational institution.
- 5.2 The employee must submit documentary proof by means of an account or invoice on which the study fees that are payable are fully specified and defined.

- 5.3 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 after more than six (6) calendar months after passing the final examination of the said course.
- 5.4 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 in equal instalments over a maximum period of six (6) months. 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.
- 5.5 Council will pay no amount in respect of book costs, equipment, stationery, class notes, travel costs or tools.
- 5.6 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.

6. SPECIAL LEAVE

(In terms of Clause 6 of the Collective Agreement on Conditions of Service for the Western Cape Division of the SALGBC.)

6.1 Study Leave

- (a) Study leave shall be granted in accordance with Council's policy. Where no policy exists by the Municipal Manager or his assignee which approval shall not be unreasonably refused.
- (b) Study leave shall be granted on the basis of one day paid special leave for each day that an employee writes an examination plus an equivalent amount of days for preparation for the examination, subject to Clause 6.1(c).
- (c) When an employee is required to write only one examination on one day in a calendar year, he shall be entitled to three days' special paid leave which shall include the day of the examination.
- (d) The said leave for writing examinations in terms of Clause 6.1 must be approved in advance by the Municipal Manager or his assignee.

6.2 Leave of absence for obligatory course / study requirements

- (a) The fields of study must be approved in advance in accordance with Council policy and must be in accordance with the requirements of the curriculum of the approved course. Where no policy exists, it shall be approved by the Municipal Manager or his assignee.
- (b) An employee attending a work-related training or study course shall be granted paid special leave for the full duration of the obligatory attendance requirements.
- (c) An employee attending a voluntary training or study course shall be granted up to ten (10) days' paid special leave and thereafter one day's paid special leave for every day's leave taken by the employee.
- (d) Leave referred to in Clauses 6.1 and 6.2 shall be granted for a maximum of twice per subject / module to allow for supplementary examinations.
- (e) Clause 6.2 does not apply to compulsory training initiated by the Employer.

7. NUMBER OF YEARS FOR WHICH ASSISTANCE IS GRANTED

(Subject to compliance with terms as set out in "Employee obligations" below.)

- 7.1 The number of years for which study assistance will be granted will be determined at the commencement of the course. 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. No financial assistance will be provided in the period of postponement or "leave of absence".

8. EXAMINATION RESULTS

- 8.1 Employees will be obliged to submit their examination results to the Human Resources Division 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.

9. FINANCIAL RECOGNITION

- 9.1 A once-off cash bonus will be awarded to an employee for the successful completion of an approved study course which is equivalent to any of the following qualification types as promulgated in General Notice 1040 of 2012 published in Government Gazette No 36003 of 14 December 2012:

- | | | |
|-----|--------------------------|---------------|
| (a) | General Certificate | (NQF Level 1) |
| (b) | Elementary Certificate | (NQF Level 2) |
| (c) | Intermediate Certificate | (NQF Level 3) |
| (d) | National Certificate | (NQF Level 4) |
| (e) | Higher Certificate | (NQF Level 5) |
| (f) | Advanced Certificate | (NQF Level 6) |
| (g) | Diploma | (NQF Level 6) |
| (h) | Advanced Diploma | (NQF Level 7) |
| (i) | Bachelor's Degree | (NQF Level 7) |

- 9.2 An employee will only qualify for one (1) cash bonus during his/her period of employment with the Cape Winelands District Municipality (CWDM).
- 9.3 Once-off cash bonuses will be calculated as five percent (5%) of the basic annual salary of an employee on date of obtaining the qualification as stipulated in Clause 9.1.
- 9.4 Once-off cash bonuses will only be paid on submission of documentary proof by the training institute that the course has been successfully completed.
- 9.5 If an employee has successfully completed an approved study course or qualification, such an employee is not obviously eligible for a higher position as a direct result of the completion of the qualification.

10. EMPLOYEE OBLIGATIONS

10.1 Leaving Council's service

- (a) An employee will be required to remain in Council's service for a period of twelve (12) months for each twelve (12) months for which leave concession was granted or financial assistance was received.
- (b) 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 (or 366 days in the case of a leap year) after the submission date of the thesis.
- (c) If an employee leaves Council's service before completing his/her studies, the employee will have to repay the full 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.

- (d) The employee will be liable for all costs of legal action instituted against him/her to recover monies 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.
- (e) 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.

10.2 Withdrawal of assistance

- (a) If in the first two years of study an employee does not pass at least two subjects in respect of a course leading to a bachelors degree or advanced 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 in equal instalments over a maximum period of six (6) months.
- (b) 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.

CAPE WINELANDS DISTRICT MUNICIPALITY / KAAPSE WYNLAND DISTRIKSMUNISIPALITEIT
APPLICATION FOR FINANCIAL ASSISTANCE AND/OR STUDY LEAVE: PART-TIME STUDIES
AANSOEK OM FINANSIËLE BYSTAND EN/OF STUDIEVERLOF: DEELTYDSE STUDIES

I hereby wish to apply for financial assistance and/or study leave, for study purposes, in terms of Council's policy and agree to be bound by its rules and conditions.

Hiermee doen ek aansoek om finansiële bystand en/of studieverlof vir studiedoeleindes ingevolge die Raad se beleid en verbind my tot die Raad se regulasies en voorwaardes.

| PERSONAL PARTICULARS / PERSOONLIKE BESONDERHEDE | | | | | | | |
|---|---|----|----|----|----|----|----|
| Staff Number / Personeelnommer | | | | | | | |
| Surname / Van | | | | | | | |
| First Name / Voornaam | | | | | | | |
| Designation / Posbenaming | | | | | | | |
| Department / Departement | | | | | | | |
| Division / Afdeling | | | | | | | |
| DETAILS OF COURSE OF STUDY / BESONDERHEDE VAN KURSUS | | | | | | | |
| Course / Kursus | | | | | | | |
| Academic Institution / Akademiese Instituut | | | | | | | |
| Duration of course / Tydsduur van kursus | | | | | | | |
| I wish to enroll for the following subjects or modules / Ek wil vir die volgende vakke/modules inskryf | <table border="1"> <tr><td>1.</td></tr> <tr><td>2.</td></tr> <tr><td>3.</td></tr> <tr><td>4.</td></tr> <tr><td>5.</td></tr> <tr><td>6.</td></tr> </table> | 1. | 2. | 3. | 4. | 5. | 6. |
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| 2. | | | | | | | |
| 3. | | | | | | | |
| 4. | | | | | | | |
| 5. | | | | | | | |
| 6. | | | | | | | |
| FEES PAYABLE (ATTACH DOCUMENTARY PROOF) / GELDE BETAALBAAR (HEG BEWYSSTUKKE AAN) | | | | | | | |
| Registration Fee / Registrasiegelde | R | | | | | | |
| Tuition- or Class Fees / Onderrig- of klasgelde | R | | | | | | |
| Examination Fees / Eksamengelde | R | | | | | | |
| TOTAL / TOTAAL | R | | | | | | |
| Have you paid any fees yourself? / Het u enige gelde self betaal? | YES / JA <input type="checkbox"/> NO / NEE <input type="checkbox"/> | | | | | | |
| If so, state amount and in respect of which fees / Indien wel, noem bedrag en ten opsigte van watter gelde | | | | | | | |
| SIGNATURE OF APPLICANT HANDTEKENING VAN AANSOEKER | DATE / DATUM | | | | | | |

Please attach documentary proof of all payments to and refunds from the educational institute.

Registration receipts to be forwarded to the Human Resources office within 7 days of issue of receipt

Heg asseblief bewysstukke van alle betalings aan en terugbetalings van die opvoedkundige instituut aan

Kwitansie van betaalde registrasiegelde moet binne 7 dae na ontvangs daarvan aan die Menslike Hulpbronne kantoor gestuur word

| AUTHORISATION / MAGTIGING | |
|---|--------------|
| SUPPORTED: HEAD OF DIVISION / DIRECTORATE ONDERSTEUN: HOOF VAN AFDELING / DIREKTORAAT | DATE / DATUM |
| RECOMMENDED: HEAD OF DEPARTEMENT (EXECUTIVE DIRECTOR) AANBEVEEL: HOOF VAN DEPARTEMENT (UITVOERENDE DIREKTEUR) | DATE / DATUM |
| APPROVED: SENIOR MANAGER: STRATEGIC SUPPORT SERVICES GOEDGEKEUR: SENIOR BESTUURDER: STRATEGIESE ONDERSTEUNINGSDIENSTE | DATE / DATUM |



EMPLOYEES WHO REQUIRE FINANCIAL ASSISTANCE AND/OR STUDY LEAVE IN TERMS OF COUNCIL'S STUDY AND BURSARY SCHEME

AGREEMENT

I hereby agree to be bound by Council's study assistance and bursary scheme as amended from time to time with regard to the study assistance I receive from Council. I undertake to adhere strictly to the conditions imposed in terms of the said policy, failing which Council will have the right of recourse as set out in the said policy. I acknowledge that I have read the said policy and am familiar with the contents thereof.

I further agree that Council may deduct from my salary in equal instalments over a maximum period of six (6) months the amount paid by Council for any study assistance for subject failed or abandoned by me or for assistance withdrawn by Council.

| | | |
|-------------------|--|--------------|
| NAME: | | |
| STAFF NO: | | |
| SIGNATURE: | | DATE: |
| WITNESS: | | DATE: |