



A Better Place for All

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DR NKOSAZANA DLAMINI ZUMA LOCAL MUNICIPALITY

STUDY ASSISTANCE: POLICY

Date Approved:	21 MAY 2024
Effective Date:	2024-2025

1. PURPOSE

The purpose of this policy document is to create a pool of adequately trained personnel within the Municipality, thereby enhancing the organization's ability to adopt and use technology to enhance the organization's competitive position and improve employee morale.

The Objectives of this policy are the following:

- To ensure a uniform procedure to all employees of the **DR NKOSAZANA DLAMINI- ZUMA Local Municipality** with regard to further studies.
- To afford employees the opportunity to further their studies.
- To encourage employees to acquire qualifications and skills.
- To develop and empower staff to expand their career prospects within the **DR NKOSAZANA DLAMINI- ZUMA Local Municipality** and other public sector institutions.
- To ensure uniformity in granting financial assistance with regard to study purposes.

2. SCOPE OF APPLICABILITY

The policy is applicable to all permanent and fixed term officials of the Dr Nkosazana Dlamini- Zuma Municipality who are appointed in terms of the Municipal Systems Act and who fall within the scope of Local Government Bargaining Council.

3. DEFINITIONS

3.1 'Bursars' an employee who studies at a South African University, Technikon, Technical College or any other recognized learning institution by means of the further study scheme and who is contractually bound to remain in the employment of the Municipality on completion of such studies for a period determined in the contract.

4. ABBREVIATIONS

4.1 'HOD' Head of Department.

4.2 'IDP' Integrated Development Plan.

4.3 'JD' Job description.

4.4 'MM' Municipal Manager.

4.5 'NQF' National Qualifications Framework.

4.6 'PDP' Personal Development Plan.

4.7 'SAQA' South African Qualification Authority.

4.8 'TNA' Training Needs Analysis.

4.9 'LGSETA' Local Government Sector Educational Training Authority

5. BUDGET

- The Corporate Support Services Department in consultation with the Financial Services department to make provision for study assistance.

6. PRINCIPLES

6.1 PROCEDURE

6.1.1 The applicant shall complete an application form and submit it together with his/her PDP and JD to the immediate supervisor for recommendation leaving sufficient time to submit the application to the Senior Manager: Corporate Support Services.

6.1.2 All bursary applications shall be recommended by HOD. Employees shall use the grievance procedure in cases of dissatisfaction with the application that has been turned down by the HOD.

6.1.3 The HOD shall consider the application based on the following:-

- Schedule of approved direction/line of studies;
- Employees Personal Development Plan (PDP);
- Progress report on previous studies.

6.1.4 The HOD shall refer the application to the Manager: Corporate Support Services by the cut-off date or as per Local requirements of the institutions.

6.1.5 The Manager: Corporate Support Services shall acknowledge receipt of the application as soon as possible thereof.

6.1.6 The Manager: Corporate Support Services shall submit applications to the Municipal Manager/Acting Municipal Manager for consideration and approval for the following categories:-

- Secondary qualifications (Grade 10 -12);
- Undergraduate qualifications;
- Post Graduate qualifications;
- Business School qualifications.

6.1.7 Once the request has been approved for further study the application form will be forwarded to the Manager: Corporate Services for administrative controls and processing.

6.1.8 The Corporate Support Services Department shall advise the applicant in writing of the decision and attaches the Study Scheme Agreement for signature.

6.1.9 The Corporate Support Services department shall request payment from the Finance Department .

6.1.10 The Corporate Support Services department shall open a Study file for the employee. The following documentation shall be placed on the file:-

- Copy of approval letter to the employee;
- Completed form PDP and JD;
- Study Scheme Agreement;
- Proof of payment to institution;
- Examination roster and results;
- Copies of leave application forms;

6.1.12 All payments shall be made to the institution on receipt of an official invoice.

6.1.13 Criteria for further Study Assistance Scheme:

SUBJECT	CRITERIA
Eligibility of Applicants	<ul style="list-style-type: none">• Full-time/Fixed term employee of Municipality• Not on Probation period.• Meet the registration requirements of the preferred institution.• Meet course specific requirements appropriate to Municipal objectives as well as the Employees Career path in the Municipality, (Personal Development Plan).• Meet any requirements that Council may have in terms of academic, merit and leadership potential.• Only part-time studies may be undertaken
Continuing Assistance	<ul style="list-style-type: none">• Satisfactory reports in respect of courses undertaken: Examination results shall be handed in at the Manager: Corporate Support Services.• Acceptable work performance.
Study Direction	<ul style="list-style-type: none">• In accordance with schedule of approved study directions/line of study by Council.• Supports anticipated career path.• Enhances knowledge, intellect or expertise.• Critical skills needed in functions.• Linked to PDP.

6.2 SERVICE OBLIGATION

6.2.1 An employee shall not leave the employment of Council for a period of three (3) years or the number of years studied, commencing on the first day of the month in which he/she obtains the qualification, unless a fixed contract has lapsed.

6.2.2 In the case of block releases an employee shall not leave the employment of Council for a period of one (1) year if special leave of up to and including twenty-six (26) weeks of the year was granted to attend classes or experiential training, unless a fixed contract has lapsed.

6.2.3 In the case of block releases in excess of twenty-six (26) weeks special leave granted to attend classes or experiential training, an employee shall not leave the employment of Council for a period of two (2) years, unless a fixed contract has lapsed.

6.3 SPECIAL LEAVE/SABBATICAL LEAVE/ PRACTICALS/BLOCK RELEASES/ ATTENDING OF CLASSES

- 6.3.1 An employee shall be granted special leave for compulsory contact session, block releases and experiential training (subject to proof).
- 6.3.2 If the special leave that has been granted for study purposes is less than twenty-six (26) weeks per year, it shall be written off on a pro rata basis over a period of one (1) year. If special leave has been granted for more than twenty-six (26) weeks per year, the same principle shall apply but shall be written off on a pro rata basis over a period of two (2) years.
- 6.3.3 Should an employee leave the service of Council before his/her leave debt has been written off – the remaining special leave days shall be written off against his/her accumulated leave whereafter the balance shall be paid out to the employee in cash, if applicable, and provided further that should insufficient accumulated leave be available, then in that case the employee shall refund the outstanding leave debt through pension pay-out.

6.4 FAILURE TO COMPLETE STUDIES

- 6.4.1 Should an employee fail a subject, be refused permission to write a subject/s or did not sit for the exam of a specific subject/s which he/she was registered for, it shall be expected that he/she shall register for the same subject at his/her own cost in the following year and submit such proof before he /she obtains further assistance from the Municipality.
- 6.4.2 No special leave shall be granted for supplementary exams unless the reasons for requesting such is submitted before the HOD for evaluation.
- 6.4.3 Should an employee fail to complete his/her studies within the applicable time frame as set by the institution, it shall be expected of the employee to pay back to Council all monies of subjects or courses failed or permission refused to write/exams not written. Subject(s) passed shall be calculated against a pro rata period of one (1) year towards his/her service obligation.

Any repayment back to Council shall be paid within the current financial year.
- 6.4.4 If an employee failed a registered course/subject, provided that proof is given of re-registration for the subject/course, the

amount shall be waived for a period for the completion of the subject or of one (1) year.

7. FAILURE TO COMPLETE SERVICE OBLIGATION

7.1 If an employee resigns from the service of Council before his/her service obligation period has been completed, the amount owing shall be immediately payable or deducted from his/her last salary and leave encashment, unless if a fixed contract has lapsed.

8. GENERAL

- 8.1 Study equipment shall be for the account of the employee.
- 8.2 Double registrations for different courses and/or registration at other institutions shall not be covered by this scheme.
- 8.3 Registration for a new diploma/degree after completion of an existing one will not be allowed within a 2-year period.
- 8.4 Completion of diploma/degree/certificate shall not automatically lead to expectation of promotion or any kind of incentive by Council.
- 8.5 Council shall not pay for re-marking of papers.
- 8.6 All other costs such as travel and subsistence allowance and accommodation shall be for the account of the employee.
- 8.7. Applications will be opened on the **1st December to 31st Jan** of the following year and from **1st May to 30th June** of the same year.
- 8.8 Council shall consider applications based on the availability of the budget on the financial year.
- 8.8 **First come first serve principle** will apply on the receipt of applications.

9. LIMIT ON THE AMOUNT

9.1 An amount per year shall be spread propositional as alluded hereunder, to be adjusted annually by CPI:

- 9.1 Undergraduate** - **R35 000 (60%Employer -40%Employee)**
- 9.2 Postgraduate** - **R45 000 (50%Employer -50%Employee)**
- 9.3 Masters** - **R 65 000 (40%Employer-60% Employee) Subject to Council Approval**

9.4 SPECIAL CASES – Master’s Degree

The employee should write a motivational letter to the Municipal Manager explain why he/she believes that she/he should be granted a study assistance to study a Master Degree and or how such research will benefit the municipality.

After receipt of the above the Municipal Manager should compile a report to the Council for approval as per Clause 9.3

10. COUNCIL APPROVAL AND EFFECTIVE DATE

Approval of Policy by Council and Effective date: -----


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MUNICIPAL MANAGER

21 / 05 / 2024
.....
DATE

ANNEXURE "A"

**APPLICATION FOR BURSARY: OFFICIAL PART-TIME STUDY
NOTE: THIS APPLICATION MUST BE SUBMITTED IN ADVANCE.
APPLICATION FOR COURSES ALREADY COMPLETED MAY
NOT BE CONSIDERED.**

APPLICANT'S NAME:

DATE:

DESIGNATION:

DEPARTMENT:

NAME OF STUDY COURSE TO BE TAKEN:

STUDENT NUMBER:

TOTAL LENGTH OF STUDY COURSE:

CURRENT YEAR OF STUDY:

TOTAL PERIOD REMAINING FOR COMPLETION OF STUDIES:

SUBJECTS TO BE STUDIED DURING THIS YEAR:

(Attach a list of the courses to be studied from the institution of study as proof)

CREDITS ALREADY RECEIVED FOR THIS COURSE (SUBJECTS AND YEARS OF EXAMINATION): (Letter from institution of study as proof of credits received to be attached)

NAME OF CORRESPONDENCE COLLEGE, UNIVERSITY, CONTACT PERSON AND CONTACT TELEPHONE NUMBER, ETC:

TOTAL AMOUNT OF COURSE FEES APPLYING FOR

DEPOSIT PAYABLE: R _____

REGISTRATION FEES: R _____

TUITION FEES: R _____

EXAMINATION FEES: R _____

PRESCRIBED BOOKS: R _____

TOTAL FEES: R _____

I HEREBY APPLY FOR THE ABOVE COURSE TO BE RECOGNIZED BY THE MUNICIPAL MANAGER AS QUALIFYING ME FOR A REFUND OF CERTAIN FEES IN THE CASE OF PAYMENT BEING MADE UPFRONT BY MYSELF. I UNDERSTAND THAT ANY SUCH REFUND WILL BE SUBJECT TO THE CONDITIONS AS APPROVED BY THE DR NKOSAZANA DLAMINI- ZUMA LOCAL MUNICIPALITY

BURSAR

DATE