

# FRANCES BAARD DISTRICT MUNICIPALITY

## EMPLOYEE STUDY ASSISTANCE POLICY



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## 1. DEFINITIONS

The following definitions and principles will apply to the council's Study Assistance Policy:

- 1.1. **Career path** is the plan mutually agreed upon between the employee and relevant department manager, or the manager's nominated representative, in terms of which the employee's skills, knowledge and/or academic qualifications will be improved within a specified period of time to be agreed between the employee and employer for five (5) years.

The employee's progress will be evaluated in terms of mutually agreed upon levels of productivity, proficiency and performance within the specified time periods. The department is responsible for the provision of the required experiential training. Academic studies must be dealt with in terms of the study assistance policy.

- 1.2. **Employee development courses** are academic programmes that develop the employee's academic skills and knowledge, through: e.g.

For the purpose of this policy, employees include councillors.

- 1.3 **Learnership contracts** are contracts entered into between (a) a learner, (b) the FBDM and (c) a training provider accredited by SAQA, where the training provider provides academic and skills training and the FBDM provides practical experience that can lead towards a qualification registered by SAQA.
- 1.4 **SAQA Act** means the South African Qualifications Authority Act, 1995 (No. 8 of 1995) - as amended.
- 1.5 **LGSETA**: the Local Government Sector Education and Training Authority.
- 1.6 **Skills Development Act**: the Skills Development Act, 1998 (No. 97 of 1998) - as amended
- 1.7 **Skills Development Levies Act**: the Skills Development Levies Act, 1999 (No. 9 of 1999) - as amended.
- 1.8 **FBDM**: Frances Baard District Municipality.

## 2 OBJECTIVES

The objective of the study assistance scheme is to encourage employees to engage in or to continue their studies in order to:

- 2.1 Develop the skills and level of academic achievement of the FBDM workforce –
  - 2.1.1 To improve the quality of life of workers, their careers and labour mobility,
  - 2.1.2 To improve the quality of life of workers, their career prospects and labour mobility, and
  - 2.1.3 To improve productivity in the FBDM;
- 2.2 Increase the levels of investment in education and training in the FBDM, and that there be return on investment through improved skills, productivity and morale;
- 2.3 Encourage departmental managers –
  - 2.3.1 to facilitate active learning in the workplace, and
  - 2.3.2 to provide employees with opportunities to acquire new skills and knowledge;
- 2.4 Encourage employees to participate in training programmes;
- 2.5 Improve the advancement of previously disadvantaged employees;
- 2.6 Meet the objectives determined by career paths, learnership contracts and progression policies;
- 2.7 Establish a pool of suitable candidates in order to support, inter alia, the Succession Planning.

### **3 ELIGIBILITY FOR STUDY ASSISTANCE**

- 3.1 Every permanent employee shall be eligible for study assistance subject to the provisions of this policy.
- 3.2 Priority shall be given to employees from designated groups in order to enhance skills development in terms of employment equity measures provided for in the FBDM Employment Equity Policy.

### **4 STUDY ASSISTANCE FOR CAREER PATHING/PROGRESSION**

Study assistance will be provided, to the mutual benefit of the FBDM and the employee, based on qualifications accredited by SAQA, where they are:

- 4.1 directly related to the employee's present career;
- 4.2 directly related to the employee's approved and mutually agreed upon career path;

- 4.3 directly related to the requirements of an approved progression policy applicable to the employee's present career;
- 4.4 necessary for the furthering the employee's career where there is a clear and logical academic path to a relevant higher post on the approved staff structure of the employee's present department. Study assistance shall include provision for post-graduate qualifications, such as honours and masters' degrees.

## **5 STUDY ASSISTANCE FOR EMPLOYEE DEVELOPMENT**

In instances where the employee's proposed field of study, will enable him/her to change his/her career in the service of the FBDM, the following procedure will be followed:

- 5.1 The employee submits a written application for study as per the procedure detailed in paragraph 11. The Human Resource Manager must identify whether the proposed study would be of benefit to the FBDM.
- 5.2 In order to determine the eligibility of the proposed course of study, a panel consisting of the Manager: Human Resources (convener), Skills Development Forum Representative, Director: Administration, Chief Financial Officer, Skills Development and the Employment Equity Manager, will consider the application. It is suggested that the relevant departmental manager, or his nominee, be part of the proposed panel mentioned in paragraph.
- 5.3 The panel mentioned in 5.2 above will submit its recommendations in the form of a report to the municipal manager for a decision and final approval.
- 5.4 Should the employee be dissatisfied with the panel's decision, he/she may pursue the matter by means of the FBDM's official grievance procedure.
- 5.5 The completion of courses obtained through the Study Assistance Scheme is not linked to salary adjustments/ awards, or any other monetary compensation other than a refund to which the employee may be entitled to on successful completion of the course.

## **6 TRAINING PROVIDERS**

Study assistance will be granted only in respect of studies at institutions accredited by a body contemplated in Section 5(1)(a)(f)(bb) of the South African Qualification Authority Act.

## **7 FINANCIAL ASSISTANCE**

- 7.1 The FBDM shall assist employees with the payment of registration, tuition and examination fees plus prescribed books upon receipt of written proof that the employee has successfully passed his/her studies for a particular academic year.
- 7.2 Should an employee fail all or some of the courses in any given year, he/she will be responsible for the payment of such courses; FBDM will only pay for the subjects passed.
- 7.3 Study assistance is available until the completion of the course.
- 7.4 Employees who after entering into an agreement, change the original approved course of study shall be deemed as having failed their original study course and clause 7.2 will automatically be applicable.

## **8 STUDY AND EXAMINATION LEAVE**

- 8.1 Study and examination leave will be dealt with in terms of the official and approved Leave Policy.

## **9 CONTRACTUAL LIABILITY IN TERMS OF FINANCIAL ASSISTANCE**

- 9.1 The employee will be required to enter into an agreement with the FBDM for admission to the study assistance scheme and to remain in the service of the FBDM for a period equal to which study assistance was granted.
- 9.2 The service requirement in terms of 9.1 shall run concurrently with any year of study. That is, if an employee has received study assistance for a period of 3 years, the second year of study will be deemed to be the fulfilment of the service requirement pertaining to the 1st year of study assistance.
- 9.3 On termination of service prior to having satisfied the requirements in 9.1, the employee shall refund the FBDM for the outstanding financial commitments in respect of his/her contractual obligation. The refund will either be in full or on a pro-rata basis.
- 9.4 Clause 9.1 is not applicable in instances of death, ill-health, incapacity or council retrenchment.

## **10 STUDIES THAT ARE UNDERTAKEN DURING WORKING HOURS FOR PART OF THE DAY OR THE FULL WORKING DAY**

### **10.1. Study during working hours**

Employees who are required to study during working hours will, subject to the exigencies/requirements of their service, be permitted a maximum of 50 working days special leave on a 50/50 basis for the duration of the programme, i.e. one day study leave for each day accumulative leave taken by the employee.

### **10.2. Proof required**

The employee must submit written proof that will be sufficient and acceptable to his/her departmental head and manager.

## **PROCEDURE FOR STUDY ASSISTANCE**

The granting of study assistance shall be considered for an employee who wish to undertake any relevant and approved study programme. Applications for prior study assistance shall be handled in terms of the following procedure:

- 10.1 The employee must submit a written request/application for study assistance at least three months prior to the start of the programme. An application on the prescribed form detailing the following must be submitted to the head of department through the immediate supervisor/manager and must, amongst others, contain the following information:
  - 10.1.1 the specific subjects and study programme that the employee wishes to study;
  - 10.1.2 the registration, tuition and examination fees in respect of each subject;
  - 10.1.3 written proof of admission to the study programme must accompany the application;
  - 10.1.4 the name and address of the service provider/educational institution;
  - 10.1.5 information about whether studies will be undertaken part-time after hours or whether the employee will be required to attend lectures/tuition during working hours. In the latter instance,
  - 10.1.6 the actual times and duration of lectures for training hours/sessions must be stated and a study roster produced and lodged to seek approval,
- 10.2 The panel as contemplated in clause 5.2 will assess the application submitted in terms of clause 11.1 above.

10.3 Feedback about the decision/outcome of the panel, contemplated by paragraph 11.2 will be disseminated to the employee and his or her HOD/manager in writing, and copy will be kept in the personal file.

10.4 In instances where the employee has successfully completed his/her course of study, the employee's line manager shall, through the HOD, request the Finance Department for a reimbursement/refund for costs of the subjects passed, upon production of valid proof. The employee's examination results must be attached as evidence.

## **11 PROCEDURE REGARDING APPLICATION FOR RETROSPECTIVE STUDY ASSISTANCE**

Retrospective study assistance is study assistance rendered in respect of studies commenced without obtaining prior approval from the panel (see clause 5.2) and shall be defined as follows:

- 11.1 The employee has enrolled/registered for the study without obtaining the approval, and has not paid any amount to the educational provider; or
- 11.2 The employee has enrolled/registered for the study programme without first obtaining approval and has paid the registration fees partially or in full; or
- 11.3 The employee is a new appointee, who was already participating in the studies at the time of his/her appointment.
- 11.4 The employee carries the risk of committing to and/or engaging in a study without first finding out whether financial assistance will be granted by the municipality.
- 11.5 Where retrospective applications are approved, the employee will be refunded with the full costs pertaining to the registration, tuition and examination fees of each subject successfully completed after the approval date and on submission to the head of department/ skills development facilitator of the official examination results issued by the academic institution/educational service provider. Costs already paid for by the employee prior to receiving approval for the studies will not be refunded by the FBDM.
- 11.6 The employee must submit a written request for study assistance, detailing:
  - 11.6.1 the specific subjects and study programme that the employee wishes to undertake;
  - 11.6.2 the registration, tuition and examination fees in respect of each subject;
  - 11.6.3 written proof of 12.1 must accompany the application;
  - 11.6.4 the name and address of the educational provider;



- 11.6.5 whether the studies will be undertaken part-time, after hours or whether the student will be required to attend lectures etc. during working hours. In the latter instance, the actual times and duration of lecture/training hours/sessions must be stated, i.e. a study roster should be lodged and approved. (clause 5.2)
- 11.7 The department manager will assess the application and determine whether the studies qualify for study assistance, as detailed under clause 4, or whether the conditions detailed in clause 5 apply.
- 11.8 The Department Manager will consult with the Manager: Human Resources in respect of these applications.
- 11.9 The department of department will inform the employee in writing of the decision reached in terms of the application.
- 11.10 Where the head of department/line manager does not recommend/approve of the application, the conditions detailed in clause 5 will apply.
- 11.11 In instances where the employee has successfully completed his/her course of study, the Director Administration shall advise the Chief Financial Officer in writing to refund the employee with the full costs as per 12.5 above of the subjects passed; the employee's examination results must be attached thereto.

## **12 STUDY ASSISTANCE AGREEMENT**

- 12.1 The study assistance agreement must be entered into between:
- 12.1.1 the FBDM employee; and
  - 12.1.2 the FBDM

## **13 APPEAL MECHANISM**

In the event of the employee being dissatisfied with the decision, the normal grievance procedure may be followed.