

INTERNAL POLICY

MOHOKARE LOCAL MUNICIPALITY	
SUBJECT: EMPLOYEE BENEFITS SCHEMES/POLICY	POLICY NO:
DIRECTORATE: CORPORATE SERVICES	COUNCIL ITEM:
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1. INTRODUCTION

This policy sets out the parameters in accordance with which the Municipality may grant financial assistance to employees who wish to acquire the necessary qualifications, to perform specific occupational tasks, general administrative tasks, and technical tasks to ensure effective service delivery.

Human Resources Management involves a dynamic partnership between management and staff, which in addition to management's commitment to staff development, also requires that management impress upon employees what it expects in return, in the form of improved work performance, for those whom time and financial resources have been invested.

The return on investment needs to be demonstrated by the employees through a consistently high work performance and meaningful contribution to the realization of the goals of Mohokare Local Municipality.

It should be pointed out that each application for study assistance shall be judged on its own merit and due consideration shall be given to those applicants who wish to study in those fields where difficulty is being experience in the recruitment of suitably qualified staff. Therefore, persons who wish to study shall give careful consideration to the field of study, their capabilities, aptitude, and talents when deciding on a course of study. **Employees who do not qualify for bursaries shall, be encouraged to proceed with their intended studies at their own costs in order to equip themselves for their existing and future careers.**

The guidelines set out below are based on the principle regarding the granting of Bursary assistance to serving employees. These guidelines are applicable to all bursars and shall be adhered to in order to ensure consistency within the Municipality.

2. DEFINITIONS

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

- (a) **“Career Path”** is the plan mutually agreed upon between the employee and relevant 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 in order for the employee to function effectively and efficiently in the working environment. 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.

- (b) **“Employee Development Courses”** are voluntary programs that develop the employee’s general skills and knowledge, through: e.g.
 - Seminars
 - Workshops
 - Courses included on the Study Assistance scheme
 - Conferences
 - Presentations

- (c) **“Learnership Contracts”** are contracts entered into between (a) a learner, (b) the MLM and (c) a training provider accredited by SAQA, where the training provider provides academic and skills training and the MLM provides practical experience that can lead towards a qualification registered by SAQA.

- (d) **“SAQA Act”**: the South African Qualifications Authority Act, 1995 (No. 8 of 1995) - as amended

- (e) **“LGSETA”**: the Local Government Sector Education and Training Authority

- (f) **“Skills Development Act”**: the Skills Development Act, 1998 (No. 97 of 1998) - as amended

- (g) **“Skills Development Levies Act”**: the Skills Development Levies Act, 1999 (No. 9 of 1999) -as amended

- (h) **“MLM”**: the Mohokare Local Municipality

3. OBJECTIVES

- 3.1 This policy is a framework designed to afford the personnel of Mohokare District Municipality the opportunity to develop themselves in a formally structured way on the basis of identified requirements in the interest of Council, in order to be able to cope satisfactorily with the present and future allocated duties.

- 3.2 This policy applies only to bursaries granted to officials of the Municipality. It does not provide for bursaries to be granted to children of officials, or to councillors, or to third parties.

4. GENERAL CONDITIONS

- 4.1 An official of the Municipality will be eligible to apply for a bursary if the following criteria are met:

- (a) he or she is a full time official of the Municipality;
- (b) he or she has been in the continuous employ of the Municipality for not less than 12 months;
- (c) he/she enters into a bursary agreement with the municipality before he/she commences with the study;
- (d) he or she meets the minimum registration requirements of the university, college or other educational institution ("institution") at which he or she wishes to register;
- (e) the field of study must be appropriate to the official's career path, current job description, is based on the needs analysis , planned and budgeted for in the WSP or must be appropriate to the development of other skills which are important to the municipality;
- (f) the bursary must can also be granted to an employee who does not fall within the category mentioned in (e) above on condition that a succession plan has been conducted and approved by the Municipal Manager or higher responsibility in the future;
- (g) the study programme is accredited by the South African Qualification Authority (SAQA); and
- (h) an employee will be eligible for assistance only once during a financial year;

- 4.2 Only applications from officials for assistance for part-time studies will be considered. Applications for assistance for full-time study will not be considered.
- 4.3 Studies may only be followed at an accredited college or University situated within the Republic of South Africa as defined by relevant legislation.
- 4.4 The bursary only covers one academic year of the course of study for which the applicant has registered. Study costs for the remaining year(s) of study will be paid by the municipality upon an application for continuation of studies by the official and bursary agreement as amended from time to time, or prevailing at that point in time, will apply.
- 4.5 Where an official fails one or more subjects, a bursary will not be granted for the subject(s) to be retaken and will be for the Official's own account.
- 4.6 A bursary will not be granted in order to write supplementary examinations for subjects or entry examinations for the course of study.
- 4.7 The municipality reserves the right whether or not to allocate a bursary and amend the conditions of the bursary schemes.

5. APPLICATION FOR BURSARY

- 5.1 Officials who wish to undertake a study course towards obtaining a work related qualifications, a degree or equivalent study must first obtain approval from the Municipal Manager through the Director: Corporate Services.
- 5.2 Each application shall be considered on individual basis to ensure that the studies an employee wishes to pursue are in the interest of Council.
- 5.3 Each application shall be submitted to the Director: Corporate Services in writing.
- 5.4 If an application is approved, the official shall be required to sign an agreement with the Municipality in the form contained in **Annexure B**. No amount shall be paid under any bursary unless and until such agreement is signed.

- 5.5 Only Senior Management (Municipal Manager and Section 56 managers) will qualify for study assistance above NQF level 7. All other employees will only qualify for assistance up to NQF level 7.

6. FINANCIAL ASSISTANCE

- 6.1 The municipality undertakes to pay tuition and registration fees or part thereof for the employee in respect of an approved course at an accredited educational institution upon receipt of a pro-forma invoice showing the registration and tuition fees, including examination fees where necessary and/or a documentary proof that the official has registered for those particular subjects of the approved course of study.
- 6.2 The municipality will pay the cost of the prescribed books upon receipt of a pro-forma invoice.
- 6.3 Prescribed books remain the property of the Official.
- 6.4 When an official is going to be absent from work due to study requirements it is the employees responsibility to ensure that all the strategic and operational functions of his/her work is properly dealt with and that his/her absence will not place undue burden on the work of the employer.

7. BURSARY CONDITIONS

- 7.1 The full cost of the bursary taken and paid for by the municipality will be recovered from the salary of the official over a period not exceeding 12 months if the official does not provide proof that he/she has passed his or her subject(s) successfully within one month following the examination.
- 7.2 The repayment of the bursary granted to the official by the municipality will be waived upon proof of passing the particular course of study for which the study assistance was granted, and if the official remains in the employ of the municipality for at least as long as the period of study after completion of the year of study in question.
- 7.3 If the official suspends or does not pass the course, or if the official leaves the employ of the municipality before the completion of the period referred to in 7.2, the amount paid as a bursary shall be recovered by the municipality from the official.

- 7.4 As referred to in clause 7.1, the official is obligated to submit results within one month following the examination or the assignments for non-examination courses. Failure to do so will result in repayment of the amount paid by the municipality for those specific subject(s) being recovered from the official's salary.
- 7.5 In the event of an official failing a subject(s) in the respective year of study, he/she will be liable to pay back the amount paid by the municipality for that particular subject(s), alternatively, the official may retake the subject(s) at his/her own cost and upon proof of successful completion of the subject(s), the amount will be waived. After having undertaken the subject(s) at his/her own cost and still having failed such subject(s), the official will remain liable to pay back the amount paid by the municipality for that particular subject(s).
- 7.6 Should an official resign whilst having a bursary, the municipality shall deduct all monies due to the municipality. In the case of the repayment of a bursary by the Municipal Manager and other managers directly accountable to the Municipal Manager, after the completion of their fixed term contracts of employment, the council will use its own discretion to either waive the repayment of the bursary or not.
- 7.7 Absence to attend lectures/tutorials/graduation
- 7.7.1 Studies will take place outside normal working hours and the usual study leave procedure will apply as prescribed in the leave policy.
- 7.7.2 In cases where Officials are required to write examinations/attend compulsory lectures outside the municipal area, the Municipality will be responsible for all related travel and accommodation expenses.
- 7.7.3 In the case of the attendance of compulsory lectures, the Official is required to submit an application for Special Leave to the Human Resources section together with proof of lecture dates, for submission to the Municipal Manager for consideration.

8. WITHDRAWAL OF FINANCIAL ASSISTANCE

- 8.1 Any Financial Assistance granted to an official will be withdrawn by the Municipal Manager where such official:
- (a) is refused permission by an institution to continue his/her studies;

- (b) breaches any provision of this Policy, or of the agreement referred to in 3.1;
- (c) fails to comply with any regulation and requirement of an institution relating to his or her studies or attendance;
- (d) is suspended by the institution for whatever reason;
- (e) terminates his or her employment or is terminated by the Municipality on the grounds of misconduct;
- (f) is discovered to have utilised any leave granted to him or her for a purpose other than to attend lectures or classes or studying or for sitting examinations in connection with the approved course being undertaken by such official;
- (g) ceases to attend his or her approved course without a reasonable or satisfactory explanation;
- (h) fails to show satisfactory progress in his studies.

8.2 If Financial Assistance is withdrawn, the outstanding amount of which has been paid to or on behalf of the official up to and including the date such cancellation shall immediately and unconditionally become due & payable by the official to the Municipality.

9. RETIREMENT FUND

9.1 Subject to any collective agreement an employee appointed on a permanent or fixed term basis in a post in the permanent establishment, must become and remain a member of, and contribute to, a retirement fund recognised by the Municipality and registered in terms of the Pension Funds Act 1956.

10. MEDICAL AID SCHEME MEMBERSHIP

10.1 Subject to any collective agreement an employee appointed on a permanent or fixed term basis in a post in the permanent establishment must, unless she/he is registered as a dependent under another scheme, become and remain a member of, and contribute to, an accredited medical aid scheme.

10.2 The Municipality shall, in respect of an employee who retires from its service and who immediately before such retirement was a member of an accredited medical aid scheme continues to contribute to such employee's medical aid premiums as determined in the current or any future Collective Agreement or as prescribed by legislation.