



REVISED EMPLOYEE STUDY AID AND LEAVE POLICY

Original Author(s)	Human Resources
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**REVISED POLICY ADOPTED BY COUNCIL ON 21 OCTOBER 2021
AT ITEM C.15.1 [CONFIDENTIAL MEETING]**

**REVISED POLICY ADOPTED BY COUNCIL ON 26 MAY 2022
AT ITEM C.15.1**

**POLICY ADOPTED BY COUNCIL ON 25 APRIL 2023
AT ITEM C.21.1**

1. OBJECTIVES

Council's Employee Study Aid and Leave policy is aimed at:

- 1.1 Enabling full-time employees of the Cape Winelands District Municipality 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 the staff establishment of the Cape Winelands District Municipality and to facilitate personnel development.
- 1.2 Identifying expertise that the Cape Winelands District Municipality has a need for and to develop this to the benefit of the Cape Winelands District Municipality to ensure higher quality employees,
- 1.3 The Cape Winelands District Municipality shall undertake to annually budget, within its financial means, an amount to enable the training of its employees.
- 1.4 The provisions of the Collective Agreement on Conditions of Service of the Western Cape Division of the SALGBC must be read together with this policy. The conditions may change and are then incorporated into the policy without having to change the policy.

2. AUTHORITY

- 2.1 The decision to support an employee undertaking a course is made by the Chief Financial Officer based on recommendations from the Director: Human Resources or his/her Nominee.

- 2.2 The Chief Financial Officer must consider three (3) main criteria when deciding whether or not to assist an employee:
- 2.2.1 If the course is relevant to the employee's current role at the Cape Winelands District Municipality or any municipal related function, and therefore would benefit the Cape Winelands District Municipality, as well as the employee;
 - 2.2.2 If this is a suitable form of investment in employee development considering the funds available, the needs of other employees in similar functional units and/or occupational levels, and other available forms of training and education; and
 - 2.2.3 If the employee has completed his/her probation period of six (6) months successfully and has been appointed on a permanent basis.

3. QUALIFYING REQUIREMENTS

- 3.1 In the normal course of events the Cape Winelands District Municipality shall recognise only qualification standards that take place at statutory recognised educational, academic or research institutions. However, Heads of Department may recommend qualifications that are in the general interest of the Cape Winelands District Municipality.
- 3.2 Recognised educational, academic or research institutions where it appears in this policy shall be taken to refer to one of the following:
- 3.2.1 South African University;
 - 3.2.2 South African University of Technology;
 - 3.2.3 South African Technical College or a Technical institution;

- 3.2.4 South African Correspondence College;
 - 3.2.5 A government / SAQA approved institution; and/or
 - 3.2.6 Any other appropriate institution as approved by the Municipal Manager.
- 3.3 Employees seeking assistance must base their proposals on the relevance of the study program to their personal development plan, work program or performance plan, and also by referring to the objectives of their work area and the Cape Winelands District Municipality's Integrated Development Plan.
- 3.4 The courses or subjects selected shall be confined to the Cape Winelands District Municipality working environment, as well as the functional and career development activities of specific employees.
- 3.5 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.

4. CRITERIA FOR ALLOCATION OF STUDY AID

- 4.1 All applications must be assessed/prioritised according to the following criteria:
- 4.1.1 Availability of funds.
 - 4.1.2 All studies must be undertaken at an approved institution (within South African borders), unless otherwise decided by the Municipal Manager.

(a) Priority Number One

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

(b) Priority Number Two

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

(d) Priority Number Three

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

(e) Priority Number Four

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

(f) Priority Number Five

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

(g) Priority Number Six

Employees who wants to study towards a postgraduate qualification.

4.2 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:

4.2.1	General Certificate	(NQF Level 1)
4.2.2	Elementary Certificate	(NQF Level 2)
4.2.3	Intermediate Certificate	(NQF Level 3)
4.2.4	National Certificate	(NQF Level 4)
4.2.5	Higher Certificate	(NQF Level 5)
4.2.6	Advanced Certificate	(NQF Level 6)
4.2.7	Diploma	(NQF Level 6)
4.2.8	Advanced Diploma	(NQF Level 7)
4.2.9	Bachelor's Degree	(NQF Level 7)
4.2.10	Bachelor Honours Degree	(NQF Level 8)
4.2.11	Postgraduate Diploma	(NQF Level 8)
4.2.12	Bachelor's Degree	(NQF Level 8)
4.2.13	Master's Degree	(NQF Level 9)
4.2.14	Master's Degree (Professional)	(NQF Level 9)
4.2.15	Doctoral Degree	(NQF Level 10)
4.2.16	Doctoral Degree (Professional)	(NQF Level 10)

5. APPLICATION PROCEDURE

- 5.1 Applications 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.
- 5.2 Application forms and agreements are available from the Division: Human Resources on request.
- 5.3 Heads of Department must recommend the study aid and/or study leave applications in terms of the qualifying requirements.

- 5.4 Study aid and/or study leave applications must be properly motivated and be recommended by the applicable Head of the Department for consideration by the Municipal Manager or his/her nominee.
- 5.5 Heads of Department 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 criteria.
- 5.6 Completed application forms, inclusive of the required recommendations, must be submitted to the Director: Human Resources or his/her nominee on/or before the closing date.
- 5.7 Applications must be accompanied by a statement/certificate by the educational institution that the employee complies with the entrance requirements for the course concerned.
- 5.8 An employee who has been awarded financial assistance and/or study leave in terms of the approved Employee Study Aid and Leave policy, by completing the application form and signing the written Employee Study Aid and Study Leave Agreement irrevocably authorises the Chief Financial Officer to deduct any amounts owing by him/her (in equal instalments over a maximum period of twelve (12) months) to the Cape Winelands District Municipality in terms of the provisions of the Employee Study Aid and Leave policy from his/her salary and/or other monies due to him/her, in the case for subjects/programmes failed or abandoned by the employee or for assistance withdrawn by Council, or any failures to complete their studies for reasons other than death, ill-health or injury.

6. STUDY FEES

- 6.1 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. The Cape Winelands District Municipality will pay the study fees in full directly to the educational institution.
- 6.2 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.
- 6.3 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. Any such reimbursements received from Council for study fees paid by the employee to the educational institution, will be taxable and subjected to section 10(1)(q)(i) of the Income Tax Act, 1962 (Act No 58 of 1962).
- 6.4 If an employee fails a subject/module/programme (for reasons other than death, ill-health or injury), he/she must repay to the Cape Winelands District Municipality the fees in respect of the subject/module/programme that he/she had failed in equal instalments over a maximum period of 12 (twelve) 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/programme (for reasons other than death, ill-health or injury) for a second time, financial assistance for the specific subject/module/programme will be totally withdrawn and the employee must repay to the Cape Winelands District Municipality the cost of the subject/module that he/she had failed.

- 6.5 The Cape Winelands District Municipality will pay no amount in respect of book costs, equipment, stationery, class notes, or tools.
- 6.6 Employees who enrolled for a recognised course at a recognised institute must sometimes pay exemption fees for subjects/modules/programme that were passed at another recognised institute. Such exemption costs will not be paid by the Cape Winelands District Municipality.

7. SPECIAL LEAVE

(In terms of Clause 5 of the Collective Agreement on Conditions of Service for the Western Cape Division of the SALGBC.)

7.1 Study Leave

- 7.1.1 Study leave shall be granted in accordance with the approved policy of the Cape Winelands District Municipality. Where no policy exists the Municipal Manager or his/her nominee shall consider the application, approval shall not be unreasonably refused.
- 7.1.2 Study leave shall be granted on the basis of one (1) 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 paragraph 7.1.3.
- 7.1.3 When an employee is required to write only one (1) examination on one (1) day in a calendar year, he/she shall be entitled to three (3) days' special paid leave which shall include the day of the examination.
- 7.1.4 The said leave for writing examinations in terms of paragraph 7.1 must be approved in advance by the Municipal Manager or his/her nominee.

7.2 Leave of absence for obligatory course / study requirements

7.2.1 The fields of study must be approved in advance in accordance with the approved policy of the Cape Winelands District Municipality and must be in accordance with the requirements of the curriculum of the approved course.

7.2.2 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.

7.2.3 An employee attending a voluntary training or study course shall be granted up to ten (10) days' paid special leave and thereafter one (1) day's paid special leave for every day's leave taken by the employee.

7.2.4 Leave referred to in paragraphs 7.1 and 7.2 shall be granted for a maximum of twice per subject / module to allow for supplementary examinations.

7.2.5 Paragraph 7.2 does not apply to compulsory training initiated by the Employer.

8. NUMBER OF YEARS FOR WHICH ASSISTANCE IS GRANTED

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

8.1 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".

9. EXAMINATION RESULTS

- 9.1 Employees will be obliged to submit their examination results to the Division: Human Resources within one (1) 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.

10. EMPLOYEE OBLIGATIONS : PAYMENT FOR SKILLS DEVELOPMENT PROGRAMMES

10.1 Leaving Council's service

- 10.1.1 An employee will be required to remain in the service of the Cape Winelands District Municipality for a period of twelve (12) months for each twelve (12) months for which leave concession was granted or financial assistance was received.
- 10.1.2 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.
- 10.1.3 If an employee leaves the service of the Cape Winelands District Municipality before completing his/her studies, the employee will have to repay the full amount which at that stage had been paid by the Cape Winelands District Municipality on behalf of the employee in terms of the study bursary concerned or leave days taken.

- 10.1.4 The employee will be liable for all costs of legal action instituted against him/her to recover monies owed to the Cape Winelands District Municipality for study purposes, including interest at the current prime rate, from the date on which such monies are due to the Cape Winelands District Municipality as well as legal costs on a scale of attorney to attorney and/or attorney to client and collection commission.
- 10.1.5 If an employee leaves the service of the Cape Winelands District Municipality for any reason whatsoever, after financial assistance has been given and before the period within which he/she is required to remain in the service of the Cape Winelands District Municipality has expired (including dismissal, but excluding death, ill-health and injury 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 the Cape Winelands District Municipality 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

- 10.2.1 If an employee does not complete the study year successfully (for reasons other than death, ill-health or injury), the study bursary must be repaid in respect of the subject(s) not passed in 12 (twelve) equal payments. Such repayment will be made by means of deductions from the applicant's wage/salary. The first deduction will be made at the end of the month following the month in which results were published; with the understanding that the applicant may at any time make payments in advance or repay the full amount due.

- 10.2.2 Apart from employees meeting the criteria for further assistance they will be required to repay all monies in respect of failed subjects/modules/programme. If assistance to an employee has been withdrawn in respect of the above-mentioned, the amount owing will not be proportionally decreased.
- 10.2.3 In the event of an employee failing to submit his/her results to the employer within one (1) month of receipt from the academic institution, the full bursary amount for that period of study shall be deducted from the officials' remuneration at the end of the month following the month in which the results were published.

11. IMPLEMENTATION OF POLICY

- 11.1 The policy will become effective upon approval thereof by the Council of the Cape Winelands District Municipality.
- 11.2 No employee of the Cape Winelands District Municipality will have any entitlement for any claim of whatever nature applicable to any form of studies undertaken during a period prior to the adoption of the Employee Study Aid and Leave policy by the Council of the Cape Winelands District Municipality.

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 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	1.		
	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		NO
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: DIRECTOR: HUMAN RESOURCES GOEDGEKEUR: DIRECTOR HUMAN RESOURCES	DATE / DATUM



**EMPLOYEES WHO REQUIRE FINANCIAL ASSISTANCE AND/OR STUDY
LEAVE IN TERMS OF COUNCIL'S EMPLOYEE STUDY AID AND / STUDY
LEAVE POLICY**

**S T U D Y A I D A N D / S T U D Y
L E A V E A G R E E M E N T**

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 deduct from my salary in equal instalments over a maximum period of twelve (12) months the amount paid by Council for any study assistance, in the case for subjects/programmes failed or abandoned by me or for assistance withdrawn by Council, or any failures to complete my studies for reasons other than death, ill-health or injury.

NAME:	
STAFF NO:	
SIGNATURE	
DATE:	
WITNESS:	
DATE:	