

STUDY BURSARY SCHEME FOR EMPLOYEES

AS AMENDED

Item B-HR (1a-2005) EKURHULENI METROPOLITAN MUNICIPALITY : POLICY :
MC 24/03/2005 STUDY BURSARY SCHEME FOR EMPLOYEES

RESOLVED

1. **That** the contents of the report to obtain approval for a Study Bursary Scheme **BE NOTED**.
2. **That** the Study Bursary Scheme (**Annexure “A”**) **BE APPROVED** and **IMPLEMENTED** retrospectively with effect from 01 July 2004.
3. **That** the Agreement attached as **Annexure “B”** **BE APPROVED**.
4. **That** the following arrangements **BE APPLICABLE** during the phasing out of the existing Study Loan Scheme:
 - * Employees paying their own study fees and wishes to claim back such fees will have to enter into an Agreement with Council in order to complete the relevant compulsory service in terms of Clause 11 of the Study Bursary Scheme, should they be granted the claim.
 - * The claims for own payment should only be considered in the event of the employee paying his/her own study fees with effect from 1 July 2004. Please note that the abovementioned claims will be considered with the proviso of Clause 7.2 of the Study Bursary Scheme. A bursary cannot be awarded if Council does not have the funds for it.
5. **That** the existing Policy on the Attendance of Classes during Normal Working Hours **BE MAINTAINED**.
6. **That** all previous Study Loan Schemes **BE RESCINDED AND REPLACED** with the proposed Study Bursary Scheme (**Annexure “A”**).
7. **That** all existing contracts / agreements **BE DEALT WITH** in terms of the law of contracts.
8. **That** the re-allocation of **R2 million** to accommodate the cost of bursaries **BE NOTED** and that the costs relating to the payment of bursaries to employees as set out in the above recommendations **BE DEBITED** against vote 153610 250 4725.
9. **That** all courses, in line with the Workplace Skills Plan of the Ekurhuleni Metropolitan Municipality, **BE APPROVED**.
10. **That** the Executive Director: Human Resource Management and Development in consultation with the Chief Financial Officer annually, on 1 July, **DETERMINE** the percentage increase in book fees to a maximum of 10%.
11. **That** an investigation **BE DONE** on the possibility to extend the opportunity of training to Councillors.

Item B-HR (08-2006)
MC 20/07/2006

**EKURHULENI METROPOLITAN MUNICIPALITY: AMENDMENT TO
THE POLICY: STUDY BURSARY SCHEME FOR EMPLOYEES**

RESOLVED:

1. **That** the contents of the report to obtain approval for an interim limitation to the amounts to be granted for study bursaries for employees **BE NOTED**.
2. **That** an interim amount to a maximum of **R10 000,00** per annum per successful applicant **BE APPROVED**.
3. **That** the amount in **2** above **EXCLUDES** book fees.
4. **That**, subject to **6** below, the interim arrangement **BE IMPLEMENTED** with effect from 01 July 2006.
5. **That** the interim arrangement **BE APPLICABLE** until finalisation of the amended Study Bursary Scheme Policy.
6. **That** the amount in **2** above also **BE APPLICABLE** to claims made, emanating from the 2005/2006 financial year.
7. **That** the number of bursaries awarded **BE LIMITED** to the available funds on the budget.

ANNEXURE "A"
EKURHULENI METROPOLITAN MUNICIPALITY
POLICY: STUDY BURSARY SCHEME FOR EMPLOYEES

TABLE OF CONTENTS

	Page
1. DEFINITIONS.....	1
2. PURPOSE.....	1
3. OBJECTIVE.....	1
4. ESTABLISHMENT OF A STUDY BURSARY SCHEME.....	2
5. PREREQUISITES FOR PARTICIPATION.....	2
6. PAYMENT OF STUDY BURSARIES.....	3
7. APPLICATIONS FOR BURSARY – OWN PAYMENT.....	3
8. NEW EMPLOYEES STUDYING TOWARDS AN APPROVED QUALIFICATION.....	4
9. LIST OF APPROVED STUDY COURSES.....	4
10. SUBMISSION OF THE RESULTS.....	4
11. COMPULSORY SERVICE BY EMPLOYEE.....	4
12. TERMINATION OF PARTICIPATION IN THE STUDY BURSARY SCHEME.....	4
13. DISPUTE RESOLUTION.....	5

1. DEFINITIONS

In this policy, unless the context indicates otherwise:

“Council”	means the Ekurhuleni Metropolitan Municipality (EMM) and includes the Mayoral Committee or any officer employed by the Council, acting by virtue of any power vested in the Council.
“Employee”	means any person, excluding an independent contractor, permanently appointed by the EMM and who receives, or is entitled to receive any remuneration.
“Registered Educational Institution”	means a University, Technikon, College and/or any other tertiary educational institution registered with the Department of Education.
“Approved Qualification”	means a degree, diploma, certificate or equivalent accredited with South African Qualification Authority (SAQA) in an approved field of study as reflected on Council’s list of approved study courses, PROVIDED it is presented at a Registered Educational Institution.
“Approved Field of Study”	means a field of study that shall have a bearing upon and be applicable to the activities of local government as determined by Council.
“Academic period”	means the duration of a course for a degree, diploma or certificate or any portion thereof consisting of a specific number of subjects or modules to be completed within a fixed period as determined by the educational institution (Provided that the period is not shorter than 3 months).
“Study Bursary”	means the bursary granted to an employee for study purposes.
“Study Bursary bursary for Scheme”	means a scheme established by Council to provide a study purposes and wherein the Council may deposit such funds as it may decide.

2. PURPOSE

The purpose of the policy is to enable Council to grant study bursary to employees in order to obtain approved qualifications at a registered educational institution.

3. OBJECTIVE

The objective of this policy is to support and encourage the education of Council employees in order to:

- promote a learning culture within the Council;
- assist employees in addressing the shortages of skills and empowering them in terms of knowledge and development; and
- develop employees to their maximum efficiency to meet the needs of the Council and the community.

4. ESTABLISHMENT OF A STUDY BURSARY SCHEME

Council may establish a study bursary scheme and may deposit therein such amounts of money from time to time depending on the affordability and / or the availability of funds.

5. PREREQUISITES FOR PARTICIPATION

5.1 Council may allocate study bursaries from the Study Bursary Scheme to a permanent employee on the following conditions:

- (a) That funds to the maximum amount as annually determined is available.
- (b) Qualifies for admission to a particular course or part thereof at a registered educational institution for a specified academic period.
- (c) Studies in an approved field of study.
- (d) Study courses are accredited by South African Qualification Authority (SAQA) and appear on the Council's list of approved courses PROVIDED it is presented at a Registered Educational Institution.
- (e) That no previous study bursary or -loan was granted for a particular subject, course or year course.
- (f) The period of the course is not shorter than three months or longer than that recommended or stipulated in the rules, regulations or yearbook of the educational institution.
- (g) That Council may, if so required, enforce a maximum limit amount to be awarded to a employees.

5.2 The money may only be utilised for the payment of normal tuition fees which includes:

- registration fees
- class fees
- examination fees (excluding re-examination fees)
- practicals
- prescribed text books not exceeding R1500.00 (with maximum 10% escalation annually starting 1 July 2006)

5.3 An employee shall apply in writing on a prescribed form, for a study bursary and furnish the following information with proof thereof:

- proof of course fees
- proof of prescribed text books
- quotation or receipt of book fees
- total costs (refer to 5.2).

5.4 Before a study bursary is granted, a written agreement shall be entered into between the Council and the employee concerned, wherein the provisions of this policy are re-affirmed.

5.5 An employee envisaging to take a study bursary will ensure:

- (a) That the course is an approved course (in line with the Workplace Skills Plan of the Ekurhuleni Metropolitan Municipality).
- (b) That the application for a bursary is duly signed for noting purposes by the Executive Director of the department or delegatee.
- (c) That the application is submitted to the Human Resource Management and Development Department for evaluation and approval.
- (d) That proof of registration and payment is submitted to the Benefit Administrator.

5.6 A study bursary will be granted for the subject, course or year course as indicated on the application form.

All employees who have been granted a bursary are prohibited to utilise the bursary to enroll for a different subject, course or year course **OR** to change the subject, course or year course at any stage during the academic year, without the permission from the Human Resource Management and Development Department. Non-compliance may result in **Clause 5.7** to be effected.

5.7 A study bursary will be granted once only for a particular subject, course or year course. If a study bursary was granted for a subject, course or a year course and the employee was unsuccessful or did not write examination in the subject, course or year course such employee forfeits the right to receive any further study bursaries until such time as proof is provided that

the subject, course or year course was successfully completed at own expense.

5.8 Council may at its discretion approve or reject an application.

6. PAYMENT OF STUDY BURSARIES

The approved amount shall be paid by the Council directly to the educational institution concerned upon the submission of proof of course fees; OR to the employee concerned upon the submission of a receipt, to the satisfaction of the Council

7. APPLICATIONS FOR BURSARY – OWN PAYMENT

7.1 An employee paying for his/her own studies towards an approved qualification, may submit a claim for a study bursary on provision of sufficient proof or documentation of successful completion thereof and a statement proving that no study fees are outstanding at the institution.

7.2 Such applications will be considered provided funds are available and preference will be given to employees who cannot afford to pay their own study fees.

7.3 Further to the above Clause 7.2, such applications will only be considered where employees paid their own study fees with effect from 1 July 2004 and if the application is submitted within one (1) month after the results have been made available by the educational institution.

7.4 Once such applications are approved, employees are subject to all relevant conditions of the Study Bursary Scheme.

8. NEW EMPLOYEES STUDYING TOWARDS AN APPROVED QUALIFICATION

- 8.1 Newly appointed employees studying towards an approved qualification will only be given bursaries for courses or studies that they enrol for only when they are in the service of Council.
- 8.2 No study costs will be taken over from the previous employer of a person newly appointed within the EMM staff structure.

9. LIST OF APPROVED STUDY COURSES

- 9.1 A list of approved study courses will be provided by the Human Resource Management and Development Department.
- 9.2 Additional study courses can be approved if in compliance with clauses 1 and 5 of the Policy and in the discretion of the Executive Director: Human Resource Management and Development or delegatee.
- 9.3 Applications for approval of additional study courses must be supported and motivated by the department concerned and all relevant curriculum information must be attached to the motivation.
- 9.4 ICT related courses will only be approved in conjunction with the Executive Director: Information Communications Technology.

10. SUBMISSION OF THE RESULTS

An employee must submit proof of the examination results to the satisfaction of the Council, within one (1) month after the results have been made available by the educational institution.

11. COMPULSORY SERVICE BY EMPLOYEE

- 11.1 Upon completion of every academic period in respect of which a study bursary was granted, the employee shall be obliged to remain in the employ of the Council for a period equal to the academic period for which the study bursary was granted.
- 11.2 The period of honouring the undertaking commences on the first day of the month following the submission of results after completing the academic period.

12. TERMINATION OF PARTICIPATION IN THE STUDY BURSARY SCHEME

- 12.1 The Council may at any time at its discretion cancel future study bursaries if an employee's progress with the studies is unsatisfactory, or if he/she fails to comply with any other obligation in terms of the regulations of the study bursary agreement.

- 12.2 If Council cancels the study bursary, or if the employee at any time discontinues his/her studies, the employee remains liable to ensure that the credit balance with the institution in terms of the original study bursary be paid back to Council and the employee must work back the compulsory service for the duration of the original study bursary.
- 12.3 In the event of an employee leaving the service of the Council, for any reason whatsoever (excluding death and retrenchment), before the employee sat for examinations **OR** before the date of expiration of the compulsory service in terms of section 11.1, an amount calculated on a pro rata basis in terms of the study bursary amount and in respect of every calendar month or portion thereof of the unexpired period of the undertaking, shall be due and payable by the employee to the Council and be deducted and appropriated by the Council from the salary or any other monies due to the employee by the Council or be recovered from the employee or his estate in any other manner as the Council may decide.

13. DISPUTE RESOLUTION

Should there be a dispute about the interpretation or application of this policy, a party to the dispute may refer it to the Corporate Affairs Committee for resolution.