



STUDY AID POLICY FOR EMPLOYEES

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1. SCOPE OF APPLICATION

- 1.1 The field of study for which a bursary is awarded must be relevant to the career development of the individual and in relation to the vision, mission, and objectives of the municipality.
- 1.2 The bursary shall be awarded per course as it appears on the application form. If the applicant wishes to change, the Municipality will grant written approval on the recommendation of the relevant Director.
- 1.3 The bursary policy will cover aspects relating to tuition fees from undergraduate to a master's, hence undergraduates will be given first preference.

2. DEFINITIONS

<i>“Best fit”</i>	Pairing the correct mentor in terms of skills, experience, and competencies with the mentee
<i>“Educational Institution”</i>	An institution where people can gain an education, e.g., Universities, Colleges, Technical Colleges, etc.
<i>“EEP”</i>	Enable the employer “to achieve reasonable progress towards employment equity” to assist in eliminating unfair discrimination in the workplace and to achieve equitable representation of employees from designated groups by means of affirmative action measures
<i>“Employee”</i>	A person permanently employed by the Overstrand Municipality who works full-time under a contract of employment.
<i>“Financial Assistance”</i>	Study bursary provided by the Overstrand Municipality
<i>“IDP”</i>	The Integrated Development Plan is a five-year plan prepared to determine the Municipality's development needs.
<i>“Individual Performance Plan (IPP)”</i>	A structured, written document created collaboratively by a supervisor and employee to define clear performance expectations, key objectives, and measurable goals for a specific period. It aligns an employee's personal work goals with organisational strategies, focusing on Key Performance Indicators (KPIs), required competencies, and behaviours.
<i>“Mentor”</i>	1. a wise and trusted counsellor or teacher 2. a person who trains/teaches and guides someone

	3. a person who gives help and advice over a period, especially help and advice related to another person's job.
<i>"Mismatch"</i>	1. may occur between a mentor and mentee 2. to put together people or things that are unsuitable for each other 3. to match two people or things wrongly or unsuitably 4. when two people don't work well together or communicate with each other 5. there may be a mismatch between the worker's skills and the actual jobs available.
<i>"Overstrand Municipal Staff"</i>	A permanent staff member of the Overstrand Municipality
<i>"Performance Development Plan"</i>	A plan where employees can identify their personal and business goals that are most significant to the organisation's success.
<i>"Prescribed Books"</i>	Books that the institution lists as essential reading/reference for success in the unit.
<i>"SAQA"</i>	The South African Qualifications Authority
<i>"Supervisors"</i>	A line manager who oversees and manages other employees whilst reporting to a more senior member of management.
<i>"Workplace Skills Plan"</i>	The Workplace Skills Plan (WSP) document lists the skills needed in an organisation and describes the range of skills development interventions that an organisation will use to address these needs

3. LEGAL FRAMEWORK

3.1. This policy must comply with all relevant legislative requirements including:

- 3.1.1 The Local Government Municipal Systems Act, Act 32 of 2000
- 3.1.2 The Skills Development Act, Act 97 of 1998
- 3.1.3 The Skills Levy Act, Act 9 of 1999
- 3.1.4 The Local Government Municipal Finance Management Act, Act 56 of 2003
- 3.1.4 Employment Equity Act, Act 55 of 1998
- 3.1.6 The Further Education and Training Act 1998
- 3.1.7 South African Qualifications Authority Act, Act 58 of 1995
- 3.1.8 National Qualifications Framework Act, Act 12 of 2019

3.1.9 Local Government: Municipal Staff Regulations, Government Notice No. 890 & 891 as published in Government Gazette 45181

4. OBJECTIVES

This Policy's objective is to enable permanently appointed Overstrand municipal staff members, by means of financial assistance in the form of aid, to undergo part-time study or training with a view to better qualify themselves for possible career advancement within the municipality's staff establishment.

This policy must be read in conjunction with the Municipality's

- Performance Management Framework.
- Succession Planning Policy.
- Employment Equity Plan and
- Workplace Skills Plan.

5. QUALIFYING REQUIREMENTS

5.1 In the normal course of events, the Municipality shall recognise only qualification standards that are recognised by the South African Qualifications Authority [SAQA] or which are compulsory in terms of legislation and are presented by recognised educational or academic institutions. However, the Municipal Manager may approve qualifications that are not recognised by SAQA, but which are in the Municipality's general interest.

5.2 Recognised educational or academic institutions referred to in clause 5.1 shall be governed by and or SAQA-approved institutions such as:

- a South African University.
- a South African University of Technology.
- other degree/diploma-granting institutions within South Africa.
- a South African College; or
- correspondence College
- a government / SAQA-approved institution, and/or
- any other appropriate institution as approved by the Municipal Manager.

5.3 The courses or subjects selected for study shall be confined to the Municipality's working environment as well as the functional and Performance Development Plan activities of a specific employee as per the performance agreement/plan.

- a. The selected field of study should form part of the Skills Development section of the employee's Performance Agreement or Performance Development Plan. This should be incorporated into the municipality's Workplace Skills Plan. Consideration for training will only be at the discretion of the Director: Corporate Services, after considering each

employee's skills development plan contained in the performance agreement.

- b. Should the request for study aid by an employee not comply with clause 5.3 above, such an employee will be required to submit a motivation for a Performance Development Plan supported by his/her Manager and Director, via the Director: Corporate Services, to the Municipal Manager, and the latter will only favourably consider the application if such Performance Development Plan is in the interest of the Municipality.

6. CRITERIA FOR ALLOCATION OF STUDY AID

All applications must be assessed/prioritised by the relevant manager for approval by the relevant director according to the following criteria:

- Subject to the availability of funds, all studies must be undertaken at an approved institution (within South African Borders), unless otherwise decided by the Municipal Manager.
- Preference will be given to employees for qualifications from the lowest educational level to the highest:
- Mandatory studies as prescribed by MSR legislation will enjoy preference above non-mandatory/optional studies.

First	Basic Education
Second	Certificate
Third	Diploma
Fourth	Degree
Fifth	Postgraduate studies - will only be considered if the qualification to be obtained is required for immediate career advancement.

- *Priority Number One*

Training needs of the required current job requirements, which are determined in the Personal Development Plan, Workplace Skills Plan, Integrated Development Plan, and Employment Equity Plan.

- *Priority Number Two*

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

- *Priority Number Three*

- Employees who want to study towards their first undergraduate qualification.

- *Priority Number Four*

Students with tertiary qualifications who wish to pursue further studies to develop their self-development within local government will also need to indicate, in addition to clause 5.3(b), on their Personal Development Plan. Employees must submit a request for approval, which must include a thorough written request, to their Manager/Director, and the final decision will be made by the Municipal Manager or his/her delegated authority.

7. APPLICATION PROCEDURE FOR STUDY AID

- 7.1 Study aid applications must be submitted on the prescribed form obtainable from the Department: Human Resources.
- 7.2 Applications must be accompanied by a statement/certificate from the educational institution stating that the employee complies with the entrance requirements for the course concerned.
- 7.3 The courses or subjects selected shall be confined to those courses directly linked to operational activities of the Municipality, especially as espoused in the Integrated Development Plan.
- 7.4 Study aid applications must be properly motivated and be supported by the head of the department for a recommendation for approval by the municipal manager or his/her delegate.
- 7.5 Applicable managers must recommend the study aid in terms of the qualifying requirements.
- 7.6 Managers must furthermore consider the implications of the recommended study aid in terms of service delivery.
- 7.7 Study aid applications must be recommended for approval by the relevant Manager, via his/her director, to the Municipal Manager or his/her delegate. Approval must be obtained at least 2 weeks before the submission deadline. No late applications will be accepted after the closing date.
- 7.8 Notwithstanding the provisions of Priority Number 5 of this Policy, but in addition to the provisions of clause 6, consistent budgetary constraints as well as challenges about the availability and possible legal implications about the appointment of qualified employees will only be permitted to enrol for 1 (one) degree, or diploma, or certificate at any time, with the further proviso, that after having successfully attained said degree or diploma or certificate, may only apply for municipal aid for a second or further degree or diploma or certificate after a period of 2 (two) years have elapsed since said attainment.

In this sense, "year" means an ordinary academic year, notwithstanding the attainment of a qualification after a period of 6 (six) months, by way of example.

8. STUDY AID

- 8.1 The term "study aid" shall be deemed to be study fees for purposes of registration, class, and examination fees, exemption fees, and thesis fees; but will not include any rewriting cost or penalties imposed by the educational institution, or membership of any student body.
- 8.2 The study fees shall be paid by the Municipality in full directly to the educational institution.
- 8.3 The employee must submit documentary proof, by means of a statement, account, or invoice, on which the study fees are fully specified and defined.
- 8.4 If an employee has paid the fees directly to the educational institution, he/she may claim reimbursement on submission of documentary proof of the said amount. Prior approval must be obtained for financial reimbursement claim applications before they can be registered at the institution. Reimbursement claims may not be submitted later than six calendar months after passing the examinations of the said subject/course.
- 8.5 Should an employee fail a subject/module, he/she must repay the fees in respect of the subject/module failed within a maximum period of 12 (twelve) months in equal monthly payments to the Municipality. 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 for a second time, financial assistance for that subject/module will be withdrawn in full, and the employee must repay the Council the cost of the subject/module they failed. The employee may, however, claim reimbursement of the relevant fees for the subject/module after it was obtained at his/her own cost.
- 8.6 An annual amount determined by the Municipal Manager to be paid towards prescribed book fees, prescribed textbooks, and class notes forming part of the curriculum or studies, which are all-inclusive in the study/class fees; the Municipality will not contribute with respect to other prescribed books, equipment, stationery, class notes, travel, and subsistence costs or tools. The provisions of this clause do not apply to the compulsory training of employees under legislation. Council will only reimburse where the employee has a legal obligation towards the employees, for training
- 8.7 Assistance to study for approved qualifications will be awarded to employees for a total period of not more than five years per qualification (two years per standard in respect of school studies; two years in respect of Honours degrees, Higher/Advanced Diplomas; three years in respect of Master's/Doctor's degrees). This period may be decreased or extended at the discretion of the relevant Director, acting on the recommendation of the Municipal Manager or his/her delegate. The number of years for which assistance will be granted will be determined at the commencement of the course unless the Director: Management Services waives this requirement. 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, at the discretion of the Municipal Manager or his/her delegate. No financial assistance will be provided during the period of postponement or "leave of absence."

- 8.8 If in the first two years of study if an employee does not pass at least two subjects in respect of a course leading to a university degree or diploma, or four subjects in respect of any other diploma/certificate course, assistance in terms of the study aid policy will be withdrawn and the employee will be required to repay the registration, class and examination fees that Council has paid on his / her behalf in respect of the study course concerned over a period as determined by the Municipal Manager or his/her delegate.
- (i) If an employee must suspend enrolment for any particular year of a course, an application for approval of such suspension must be made, together with the reasons for the request, for the discretion of the Municipal Manager or his/her delegate.
 - (ii) If an employee has suspended enrolment for any particular year of study, without obtaining approval as per paragraph (ii), the employee will have to repay the registration, class and examination fees that Council has paid on his/her behalf in respect of the study course concerned over a period as determined by the Municipal Manager or his/her delegate.
 - (iii) If an employee has at any stage aborted studies, to complete qualification for which assistance has been received, the employee will have to repay the registration, class, and examination fees that Council has paid on his/her behalf in respect of the study course concerned over a period as determined by the Municipal Manager or his/her delegate unless the discontinuation was considered and approved at the discretion of the Municipal Manager or his/her delegate.

9. EXAMINATION RESULTS

Employees will be obliged to submit their examination results to the Department of Human Resources within one month of receiving the said results; failing which, it shall be deemed that the subjects/modules were failed, and in that case, clause 8.5 shall apply.

10. EMPLOYEE OBLIGATIONS

- 10.1 Employees must enter into study aid agreements with the Municipality in terms of which the contractual relationship in terms of this policy is set out.

- 10.2 An employee will be required to remain in the Municipality's service for a period of one year for each year for which a study aid was granted. This required period will come into effect annually on the date on which the last examination for that year was written. Where no examination was taken but a master's thesis was submitted, the employee will be required to remain in the Municipality's service for one year after the thesis is finally accepted.
- 10.3 Should an employee leave the Municipality's service within the timeframes mentioned in clause 10.2 for whatever reason, the employee must pro rata repay the amount of study aid to the Municipality in full. If an employee leaves Council service for any reason whatsoever after assistance has been given and before the period within which he/she is required to remain in Council service as expired (including dismissal, but excluding death 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 Council has paid on his/her behalf in terms of the study aid policy.
- 10.4 Should it be necessary to institute legal action to recover money in terms of clause 10.3, the employee will be liable for all legal costs on a scale of attorney and client, including interest at the current prime rate from the date on which such monies are due to the Municipality.

11. MENTORING/COACHING

The role and responsibilities of supervisors: -

- (a) Monitor skills needs and constraints that have, or may have, a major impact on the achievement of their objectives and report on these during the institutional skills needs analysis process.
- (b) Provide coaching to and support for the development of their staff members.
- (c) Position mentoring/coaching as a key activity within the Municipality's overall approach to staff learning and development.
- (d) Establish what skills and experiences are needed to develop an individual's career.
- (e) Provide opportunities to learn from someone with a greater understanding of the organisation.
- (f) Enable both managers and employees to understand the different roles within the mentoring/coaching relationship and how each should be undertaken.
- (g) Provide opportunities for the development of all staff through the mentoring/coaching relationship.

- (h) The decision as to who will be eligible for the mentoring/coaching programme will rest with the respective Director/s.
- (i) The Respective Director will decide on the mentor/coach who will assume their responsibilities, subject to the availability of time and other resources. The match will be based on the perceived “best fit” of both parties, in terms of overall attitude, approach, experience, etc. In the event of a “mismatch” occurring between the mentor and mentee, a substitute will be found.
- (j) The mentor or coach will have responsibilities to: -
 - (a) Establish and agree to mentor/coach the mentee in terms of regular meetings, feedback, timescales, action plans, and resources required.
 - (b) Encourage regular meetings with the mentee and oversee their progress against the agreed timetable.
 - (c) Liaise with the Director over the mentee’s personal development plan and find ways of helping to take this forward.
 - (d) Help to evaluate the overall mentoring process and its outcomes
 - (e) Take responsibility for the mentor/mentee relationship and its success with the programme.

12. RECOGNITION OF PRIOR LEARNING (RPL)

- 12.1 Recognition of Prior Learning (RPL) is an assessment process through which learners may be awarded credits for learning that they have already obtained through work experience or some form of prior learning.
- 12.2 During this assessment, learners must show that they meet the learning outcomes in the learning standards for a qualification by demonstrating what they know and can do. It is possible to obtain access to the final integrated summative assessment for a whole qualification, or part of a qualification, through RPL.
- 12.3 RPL assessments are subject to:
 - 12.3.1 Operational requirements
 - 12.3.2 Organisational needs
 - 12.3.3 The availability of financial and human resources
 - 12.3.3 Operational constraints
- 12.4 The Municipality is committed to advocating RPL as an accessible developmental tool for building the organisation and its employees and recognising the value of the principle of RPL for the development of previously disadvantaged individuals and for equipping all employees with qualifications relevant to their occupational category and level.

12.5 Employees who have the relevant prior experience, but no formal learning/qualification, will be allowed to undergo RPL.

12.6 Recognition of prior learning assessment shall be conducted:

- 12.6.1 By service providers that are accredited by the relevant Education and Training Quality Assurance Body; and
- 12.6.2 In line with the provisions of the National Qualifications Framework established in terms of the National Qualifications Framework Act, 2008 (Act No.67 of 2008).

13. DISPUTE RESOLUTION

13.1 Any dispute referral can be dealt with in terms of the Bargaining Council Grievance Procedure.

Policy section	Human Resources
Current Update	26 August 2026
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