

A8/2008

**AMENDMENT OF MATJHABENG MUNICIPALITY STUDY ASSISTANCE SCHEME (DGSS) (5/4/3/1)**

**PURPOSE OF REPORT**

The purpose of the report is to propose amendments in respect of the adopted Employee Educational Assistance Scheme (EEAS)

**COUNCIL RESOLVED (29 JANUARY 2008)**

1. That the following amendments to the Matjhabeng Municipal Study Assistance Scheme **BE APPROVED**:
  - (a) That study assistance in respect of recognised and relevant tertiary studies be granted to all employees and Councillors;
  - (b) That the name: "Employee Educational Assistance Scheme" be changed to "Study Assistance Scheme", thereby including all "contributors" to the skills levy and also clearly distinguishing this scheme from the EAP ("Employee Assistance Programme") dealing with wellness;
  - (c) That the maximum amount (upper limit) of financial assistance per person, regardless of the actual cost of intended studies, be fixed at R6000.00 per annum annually adjusted with 5%;
  - (d) That further financial assistance will only be considered on receipt of examination results pertaining to subjects for which assistance was granted. In the event of subjects failed, further assistance will not be considered for failed subjects;
  - (e) That Study leave will initially be treated as annual leave and only upon submitting successful results will it be changed to special leave;
  - (f) That newly appointed officials will only be considered for study assistance after successfully serving the required probation period;
2. That the Municipal Manager **SHOULD FOLLOW UP** on the repayment clause, if a student fails and **SUBMIT** a report at the next meeting.

**MATJHABENG MUNICIPALITY**  
**STUDY ASSISTANCE SCHEME (SAS)**

**1. PURPOSE**

- 1.1 The purpose of the Study Assistance Scheme (SAS) is to encourage and assist Councillors and Officials who want to develop their potential and thus increase their value to the Municipality through obtaining formal qualifications recognised on the National Qualifications Framework (NQF).

**2. GENERAL**

- 2.1 The scheme covers approved courses or curricula leading up to a formal qualification provided by reputable, accredited education and training providers recognised by the MATJHABENG MUNICIPALITY. The relevance of the intended studies, cost and the training provider need to be evaluated prior to approval of applications.
- 2.2 Recognised qualifications are generally school certificates, degrees and diplomas of substance aligned within the National Qualifications Framework (NQF). Applicants intending to further their education have to complete an application form (Annexure A: Officials; Annexure B: Councillors).
- 2.3 The application of officials and Councillors must be recommended by the relevant Head of Department and Offices of the Speaker/Executive Mayor respectively, recommended by the Executive Director Corporate Support Services and approved by the Municipal Manager **prior to** commencement of the course. Where an applicant commences study without approval, he/she will not be entitled to financial assistance.
- 2.4 A beneficiary in terms of this scheme who fails all or part of the year/course will not be considered for further assistance in respect of the relevant failed subject(s).

**3. CRITERIA FOR GRANTING ASSISTANCE**

Applicants will be eligible to apply for study assistance under the following conditions:-

- That the course of study, provided by a recognised institution, is relevant to the Local Government Sector and that it will increase the applicant's contribution / value to the MUNICIPALITY.
- That the course of study will benefit the employee in terms of his/her current area of specialization, or the employee's current or future responsibilities that have been identified.
- That the performance of the employee is sufficient to warrant the investment in the employee's future within the MATJHABENG MUNICIPALITY.

- That if deemed necessary, the applicant be assessed by a reputable institution in order to determine the likelihood of success in following a particular course.
- Newly appointed officials will only be considered for study assistance after successfully serving the required probation period.

#### 4. FINANCIAL ASSISTANCE

- 4.1 Financial assistance will be considered for applicants in terms of the criteria as outlined. This assistance scheme only covers the cost of registration, tuition and first attempt examination fees.
- 4.2 Financial assistance to cover cost to a maximum of R 6000.00 per annum, annually adjusted with 5%.
- 4.3 The Municipality will normally pay accounts direct to the educational institution concerned.

#### 5. ADMINISTRATION

- 5.1 Applications must be submitted on the applicable 'Application for Study Aid' form attached hereto (Annexure A or B).
- 5.2 Applications will only be considered and processed if submitted within the time frame of 1 November to 28 February and 1 June to 31 July.
- 5.3 The applicant is required to supply proof of having successfully completed the course / module(s) applied for in order to be considered for any further assistance in respect of the specific course/module(s).
- 5.4 It will be expected from officials to remain in service for a period equal to the period of assistance granted. Such period will not run concurrently with the period of assistance but will commence thereafter. If service is terminated before the said period, a pro-rata amount in terms of the amount granted for study assistance, will be deducted from his/her final salary.
- 5.5 The Municipality reserves the right to withhold any financial assistance or to cancel any agreement in terms of this scheme in the event that the Municipality in its own discretion considers that circumstances have been arisen which are not provided for or which would justify such withholding or cancellation.
- 5.6 The employee undertakes to inform the Municipality immediately of:
  - a) Any change of address
  - b) Cessation and/or change of courses
  - c) He/she is of the opinion that it has become impossible to fully comply with an agreement in terms of this scheme

- 740
- 5.7 The Municipality shall be entitled to vary any of the terms and conditions contained in this scheme if in its own discretion it will be to the advantage of either one or both parties to do so.

## 6. STUDY LEAVE

- 6.1 The MUNICIPALITY will grant two (2) days study leave per subject (one for preparation and one for examination) to all employees who qualify for study aid in terms of the Study Assistance Scheme.
- 6.2 In cases where two subjects are being written on one day or on successive days, two (2) days study leave prior to writing the two papers will be granted.
- 6.3 Any additional leave required for examination purposes, must be taken as annual leave.
- 6.4 Examination results have to be submitted to Human Resources for purposes of administering study leave. Study leave will initially be treated as annual leave and only upon submitting successful results will it be changed to special leave.
- 6.5 In the event that a beneficiary to this scheme fails to sit for exams for no good reason(s), the relevant amount granted will be deducted from such a beneficiary.
- 6.6 If the employee fails the first time he/she writes the exam, study leave as stipulated in 6.1 and 6.2 will be granted to re-write. Any leave required to write the same subjects again after failing for a second time, will have to be taken as annual leave or, where no annual leave is due, as unpaid leave.
- 6.7 Authorised application for leave must be in writing on the official Leave Application Form and must be accompanied by the official examination roster as provided by the educational institution.

24/

**ANNEXURE A**

**STUDY ASSISTANCE SCHEME (SAS)**

**APPLICATION FOR STUDY AID**

**SECTION 1: PERSONAL DETAILS**

Employee number	
Surname & initials	
Appointment date	
Job Designation	
Highest Qualification	
Department	
ID number	
Telephone number	
Postal Address	
Residential Address	

Did you previously receive any study aid from the Municipality? \_\_\_\_\_

If Yes, please list the subjects passed and those still to be completed.

Subjects Passed	Subjects to be Completed

**STUDY COURSE APPLIED FOR** (Compulsory: Please attach a quotation from the Institution/Provider and the Course Curriculum being applied for. Indicate all costs such as registration / application/ examination fees).

Name of Course		
Accredited Institution / Provider		
Period financial assistance applied for:		(max 1 yr)
Subject(s):	Subject Code:	Cost per Subject:
		<b>TOTAL: R</b>
		(Maximum of R 6000.00 p.a.)

42

**BANKING DETAILS OF TERTIARY INSTITUTION (COMPULSORY)**

Account Name	
Bank	
Account number	
Branch Code	

**SECTION 2: STUDY AID REQUIRED**

Amount	R  (Maximum of R 6000.00 p.a.)
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I, \_\_\_\_\_, (Full Names & Surname) currently employed by the MATJHABENG MUNICIPALITY, hereby declare that I fully understand the conditions as stipulated in the STUDY ASSISTANCE SCHEME. I also undertake to remain in service of MATJHABENG MUNICIPALITY for at least a period equal to the period of assistance granted.

I, \_\_\_\_\_, (Full Names & Surname) undertake to provide MATJHABENG MUNICIPALITY with my examination results as soon as it is available.

Signed at \_\_\_\_\_ on the \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_

Signature: \_\_\_\_\_  
(Employee)

Witnesses  
1. \_\_\_\_\_  
2. \_\_\_\_\_

43

**SECTION 3: FINDINGS BY SUPERVISOR**

- a) The course of study is relevant to the Local Government Sector and it will increase the employee's contribution / value to the Municipality. Yes No
- b) The course of study will benefit the employee in terms of his/her current post or future post in terms of career pathing or succession planning. Yes No
- c) The performance of the employee is sufficient to warrant the investment in the employee's future within the Municipality. Yes No
- d) The application form is completed and a quotation of the institution / provider is attached. Yes No

In the light of the abovementioned I **recommend / do not recommend** this application for study assistance.

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Supervisor: \_\_\_\_\_ Date: \_\_\_\_\_

Name in Full: \_\_\_\_\_

**SECTION 4: RECOMMENDATION BY EXECUTIVE DIRECTOR**

The above study course is **recommended / not recommended**. Kindly motivate your decision.

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Executive Director \_\_\_\_\_ Date: \_\_\_\_\_

Name in Full: \_\_\_\_\_

474

**SECTION 5: RECOMMENDATION BY EXECUTIVE DIRECTOR: CORPORATE SUPPORT SERVICES**

The above study course is **recommended/not recommended**. (Remarks, if any):

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Executive Director: \_\_\_\_\_ Date: \_\_\_\_\_  
Corporate Support Services

Name in Full: \_\_\_\_\_

**SECTION 6: APPROVAL BY MUNICIPAL MANAGER**

The above study course is **approved / not approved**. (Remarks, if any):

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Municipal Manager: \_\_\_\_\_ Date: \_\_\_\_\_

Name in Full: \_\_\_\_\_



46

**SECTION 2:**

**STUDY AID REQUIRED**

Amount	R  (maximum: R 6000.00 p.a.)
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I, \_\_\_\_\_, (Full Names & Surname) currently a Councillor within the MATJHABENG MUNICIPALITY, hereby declare that I fully understand the conditions as stipulated in the STUDY ASSISTANCE SCHEME.

Signed at \_\_\_\_\_ on the \_\_\_\_\_ day of \_\_\_\_\_ 20 \_\_\_\_\_.

Signature: \_\_\_\_\_ (Councillor) Witnesses: 1. \_\_\_\_\_

2. \_\_\_\_\_

**SECTION 3:**

**RECOMMENDATION BY OFFICE OF THE EXECUTIVE MAYOR/ SPEAKER\***

The above study course is recommended / not recommended. If not recommended, please give reasons.

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Executive Mayor/ Speaker: \_\_\_\_\_ Date: \_\_\_\_\_

Name in Full: \_\_\_\_\_

\* Note: Office of the Executive Mayor, in case of Mayoral Committee Members and the Office of the Speaker in case of other Councillors.

47

**SECTION 4:**

**DECISION BY EXECUTIVE DIRECTOR: CORPORATE SUPPORT SERVICES**

The above study course is **recommended/ not recommended**. If not approved, please give reasons.

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Executive Director: \_\_\_\_\_ Date: \_\_\_\_\_  
Corporate Support Services

Name In Full: \_\_\_\_\_

**SECTION 5:**

**APPROVAL BY MUNICIPAL MANAGER**

The above study course is **approved / not approved**.

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Municipal Manager: \_\_\_\_\_ Date: \_\_\_\_\_

Name In Full: \_\_\_\_\_