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Contents

1. GLOSSARY AND ABBREVIATIONS

DOL	Directorate of Labour
DSDTC	Directorial Skills Development Training Committee
ETD	Education, Training and Development
ETDP	Education, Training and Development Policy
ED	Executive Director
MM	Municipal Manager
SM	Senior Manager
SMHRM	Senior Manager: Human Resource Management Service
IDP	Integrated Development Plan
LGSETA	Local Government, Sector Education and Training Authority
NQF	National Qualifications Framework
NSDS	National Skills Development Strategy
SAQA	South African Qualifications Authority
SDF	Skills Development Facilitator
SETA	Sector Education and Training Authority
TC	Training Committee

1. PURPOSE

The purpose of this Education, Training and Development (ETD) Policy is to provide specific guidelines with respect to ETD practices and procedures within Bitou Municipality.

This policy should be applicable to:

1.1   Employees of the Bitou Municipality employed on permanent positions;

1.2   All Councillors;

2. ALIGNMENT WITH NATIONAL AND LEGISLATIVE INITIATIVES

2.1   This policy serves as a strategic link to all the relevant South African Legislation and Regulations with specific reference to the:

2.1. South African Qualifications Authority (SAQA);

2.2. National Qualifications Framework (NQF);

2.3. Department of Labour (DOL); and

2.4. National Skills Development Strategy 3 (NSDS 3).

3. QUALITY ASSURANCE MECHANISMS

3.1   ETD interventions (venues, programme outcomes and facilitators) will subscribe to the Education Training Quality Assurance (ETQA) requirements as prescribed by the Education and Training Quality Assurance function/directorate of the relevant SETA; and

3.2   The Division of Human Resources Management Services should provide appropriate guidance to line management and learners/trainees regarding the credibility and compliance of external training providers in line with the relevant legislation.

4. OBJECTIVES OF ETD WITHIN BITOU MUNICIPALITY

4.1. All learning initiatives subsequent to Education, Training & Development (ETD) of the municipality will, in terms of priority, be carried out to achieve the current and future objectives of the Bitou Municipality as per the Integrated Development Plan (IDP).

4.2. The overall purpose is to provide advice, opportunities, facilities, and financial support to empower employees and Councillors of Bitou Municipality.

4.3. To acquire the skills, knowledge needed via the related qualifications to effectively perform their duties and tasks for which they are employed, and to instil the required attitudes and values which will ensure the effective application of these skills and knowledge.

4.4. To encourage employees to develop their full potential through provision of mechanisms such as learnerships, skills programmes, mentorship, skills audits assessments, skills planning, career management and succession planning;

4.5. To be future career guided directed, i.e. to develop their potential to meet their future staffing needs of Bitou Municipality by preparing them for new and different jobs/ task or new responsibilities, and thereby facilitating the achievement of Employment Equity goals;

4.6. To enable individuals to contribute more effectively as a member of a team and by doing so, enhance productivity and service delivery within the Bitou Municipality;

4.7. In exceptional cases to develop individuals beyond the immediate and foreseeable needs of their current directorates and Bitou Municipality at large, i.e. increase the competency base of employees through multi-skilling, up-skilling and broad-skilling; and

4.8. The Bitou Municipality also promotes the concepts of self-development, lifelong learning and continuous improvement. All stakeholders of Bitou Municipality must

fully align themselves with all efforts and initiatives to establish the Bitou Municipality as a learning organisation.

5. ROLES AND RESPONSIBILITIES

The objective is to set up a range of institutional support structures in the Bitou Municipality to support and ensure that the divisions, implement Education, Training and Development (ETD) programmes in ways that are cost-effective, accessible, equitable, flexible, needs based and capable of addressing the current and future needs of the Directorates, the community and the people working in the Directorate.

5.1. COUNCILLORS

5.1.1. All councillors serving on any working committee for the Council also need to be afforded opportunities to broaden their skills; and

5.1.2. Nominations via the Executive Mayor/Deputy Executive Mayor in the absence of the Executive Mayor need to be forwarded to the Skills Development section. All the logistical arrangements for councillors and political support staff must be done via the Skills development section after the appropriate approval has been received. This will be done in conjunction with the Speakers' office. The Chief Whip of each political party will coordinate the nominations.

5.2. OFFICIALS

5.2.1. Each incumbent needs to, on an annual basis, link their skills developmental need to their job description and enter into an agreement with their supervisor to promote service delivery;

5.2.2. In areas of where no consensus is reached their union representative and the HR Manager need to be informed to ensure that development of staff is not adversely affected; and

5.2.3. Career-path developmental needs is a secondary priority, and this must also receive the appropriate attention and forward planning and be documented in the performance management plan, subject to availability of funding.

5.3. DIRECTORATE BUDGET

5.3.1. Officials who want to attend any learning opportunity not listed in the workplace skills plan should request to attend such events courses, workshops, seminars, or conferences (that are advertised during the course of the year) through their immediate supervisor and/or Directorates, as this is funded by their Directorate's budget.

5.4. DIRECTORS /SENIOR MANAGERS

5.4.1. Must ensure that each individual is exposed to opportunities. Skills development must be linked to the duties of the incumbent, but not limited to it. Career-path planning should also be looked at.

5.5. SECTOR EDUCATIONS AND TRAINING AUTHORITY (SETA)

As per the relevant legislation with specific focus on:

5.5.1. Accreditation and quality assurance;

5.5.2. Monitoring and evaluating the relevance and appropriateness of the courses and products offered by training institution;

5.5.3. Receipt of training implementation reports and other relevant documents from all Bitou Municipality's Directorates;

5.5.4. Compilation of regular and comprehensive reports, which will be distributed to all key stakeholders;

5.5.5. Recommending standards and qualifications (including Learnerships and Skills Programs) across the field of the LGSETA; and

5.5.6. Recommendation of standards and qualifications to the National Standard Bodies.

5.6. THE ROLE OF THE SKILLS DEVELOPMENT FACILITATOR

5.6.1. Advise directorates in respect of Skills legislation, team and organizational interventions.

5.6.2. Facilitate quality assurance, accreditation and certification are facilitated;

5.6.3. Complete skills audits/needs analysis in conjunction with the IDP and Human Resources.

5.6.4. Integrate a list of internal and external programs and service providers and complete skills reports for submission to SETA.

5.6.5. Evaluate all training initiatives.

5.6.6. Develop consolidated progress and evaluation reports on the implementation of Workplace Skills Plans as well as utilization of the training budget.

5.6.7. Ensure that proper procurement practices are followed when obtaining services of training providers as per the Municipal Finance Management Act; and

5.6.8. Ensure retrieval of grants from the SETA.

5.7. SKILLS DEVELOPMENT SYSTEMS/QUALITY ASSURANCE SYSTEMS

5.7.1. Human Resources Development Sub- Committee are in place;

5.7.2. Constitution for Skills Development Committees is maintained;

5.7.3. Accountability for auditing, implementation, monitoring, and reporting systems for skills development to be put in place

5.7.4. Levy payment and grant recovery systems are in place;

5.7.5. An effective ETD Needs Analysis Tool is in place, as required by the SETA, NQF and Training and Events Modules;

5.7.6. Systems are quality assured; and

5.7.7. Ensure maintenance of national standards on all education, training and development initiatives.

5.8. THE TRAINING COMMITTEE (TC)

5.8.1 The Training Committee shall be established in accordance with the Skills Development Act and the Staff Regulations;

5.8.1.1 Composition Of the Training Committee

5.8.1.1.1 Director Corporate Services must chair the Training Committee;

5.8.1.1.2 The Training Committee must have an equal number of managers and representatives of staff;

5.8.1.1.3 The representatives of the municipality should include the Manager: Integrated Development Planning, Skills Development Facilitator, Manager: Human Resources Management, Manager: Performance Management and the Chief Financial Officer.

5.8.1.1.4 The representatives of staff members must include representatives of the registered Trade Unions that are recognized by the municipality or, in their absence, staff members who are representatives of the municipality as a whole.

5.8.2 These forums shall consist of all Stakeholder groups as determined by the relevant legislation and guidelines; and

5.8.3 The agenda items for discussion at this forum need to be influenced from a holistic perspective, LGSETA, DSDTC, HRD, Unions, Councilors, ED's, IDP and Human Resources.

5.8.4 The Training Committee must consult and make recommendations to the Local Labour Forum, on:

5.8.4.1.1 Proposed improvements to skills audit processes

5.8.4.1.2 Findings and priorities emerging from the skills audit presented by management

5.8.4.1.3 The draft Workplace Skills Plan (WSP)

5.8.4.1.4 Management's regular skills development report

5.8.4.1.5 Skills development policies of the municipality

5.8.5 Frequency of meetings will be quarterly

5.9 DIRECTORATE SKILLS DEVELOPMENT TRAINING COMMITTEE (DSDTC)

5.9.1 Shall be established in each Directorate;

5.9.2 These forums shall consist of all stakeholder groups as determined by the relevant legislation and guidelines;

5.9.3 The agenda's and minutes of both these forums need to be standing items on each other's agenda's to ensure a two-way communication in order to achieve the vision and mission and to keep Bitou Municipality alive as a learning organization;

5.9.4 Ensuring that the provisions of the Employment Equity Act, the Skills Development Act and the Skills Development Levies Act and all other relevant legislation are adhered to;

5.9.5 Ensuring compliance to Bitou Municipality policies;

5.9.6 Support and promote the Skills Development processes;

5.9.7 Consult on the preparation and implementation of the Workplace Skills Plan;

5.9.8 Monitoring the rollout of the ETD interventions in and ensuring that corrective measures are in place;

5.9.9 Creating a transfer partnership that discuss the effectiveness of training and the problems learners experience when they are back at the job after training or development sessions;

5.9.10 Ensure that dispute resolution mechanism is in place to assist in the resolution of grievances and disputes regarding skills development;

5.9.11 Consult on the preparation of the annual Workplace Skills Plan before submission to the LGSETA. (Verification and Sign off);

5.9.12 Ensure effective communication between stakeholders regarding skills matters;

5.9.13 Draw and implement the centralized training budget;

5.9.14 Conduct research and provide information on the latest trends on training and development in relation to core competencies;

5.9.15 Ensure the development for the capacity of the training personnel throughout the directorates;

5.9.16 Facilitate the development of Learnerships

5.9.17 Facilitate the development of assessors;

5.9.18 Initiate the development of the municipalities specific standards;

5.9.19 Establish relationships with SAQA, Directorate of Labour and Education structures; and

5.9.20 Monitor the outsourcing of training by Directorates.

5.10 THE MAYORAL COMMITTEE, MUNICIPAL MANAGER, DIRECTORS, HR MANAGER AND THE TRAINING & DEVELOPMENT SECTION

To provide ETD resources to employees in accordance with the Bitou Municipality's needs and in line with relevant legislation. Whilst the employee's career aspirations are important, the Bitou Municipality will accord priority to address needs in the provision of ETD.

5.11 MUNICIPAL MANAGER

5.11.1 Accountable for ETD of staff within their working environment;

5.11.2 Provide ETD facilities and infrastructure activities within their scope of responsibilities;

5.11.3 Guide and assist Directors of re-development of career path and job profiles within their portfolios of all their subordinates;

5.11.4 Ensure development and implementation of Workplace Skills Plan

5.11.5 Assess progress and evaluation reports on the implementation of Workplace Skills Plan;

5.11.6 Assess the development and implementation of plans for the personal development of staff;

5.11.7 Assess identification of success candidates as well as development and implementation of skill transfer mechanisms;

5.11.8 Accountable for orientation and re-orientation of staff; and

5.11.9 Promote and monitor the ETD of the designated employee groups.

5.12 ==TRAINING COMMITTEE== REPRESENTATIVES (ALONG WITH SUPERVISORS)

5.12.1 Accountable for training of staff within their directorates (including management of succession and acting on a rotational basis);

5.12.2 Arrange induction within the directorate and specific section/s;

5.12.3 To ensure that proper ETD needs analysis are regularly conducted;

5.12.4 Ensure the development and implementation of the Departmental Workplace Skills Plan;

5.12.5 Facilitate the development and implementation of plans for the personal development of staff;

5.12.6 Provide an enabling and a supportive environment for the employees, which must be accompanied by an effective career management approach, and a coaching and mentoring system to help and assist the Employee to develop as effective and fast as possible; and

5.12.7 Responsible for travelling arrangements of learners, to and from training venues.

5.13 THE TRAINING AND DEVELOPMENT SECTION

5.13.1 Accountable for **orientation** of staff within Bitou Municipality;

5.13.2 **Line Managers are responsible for the specific induction within the respective directorates;**

5.13.3 Determine training and development needs of personnel;

5.13.4 Develop and implement Workplace Skills Plans;

5.13.5 Identify succession-planning candidates and develop their Individual Development Plans (IDP's);

5.13.6 Encourage and assist staff with the development of their Personal Development Plans;

5.13.7 Provide timeous and structured induction of personnel;

5.13.8 Responsible for orientation and re-orientation of personnel;

5.13.9 Prepare progress and evaluation reports on the implementation of Workplace Skills Plans, Induction / Orientation Programmes, Personal Development Plans and Succession Planning;

5.13.10 Manage training budgets;

5.13.11 Nominations must be coordinated by the Training Division of Bitou Municipality but the Director and immediate Supervisors need to be informed (a memo should go out 3 weeks in advance for nominee requests) to ensure smooth service delivery;

5.13.12 All logistical arrangements must be done via the Training and Development Section staff;

5.13.13 Staff requesting to attend workshops and seminars or conferences that are advertised during the course of the year after submission of the Workplace Skills Plan need to work through their immediate supervisor and/or Directorial Training Committee if established and functioning as stipulated above, only then to be forwarded to the Training and Development Section;

5.13.14 Compilation of the Workplace Skills Plan can only be done after each directorate has submitted their Directorate plan listing the skills development for each employee;

5.13.15 Updating of the database of the skills audit on a regular basis is very important

5.13.16 The attached nomination form should be completed; and

5.13.17 Where possible for every male employee or councillor that will be nominated at least two females should be nominated.

5.14 EMPLOYEES / LEARNERS / TRAINEES

5.14.1   Develop with the assistance of the SDF and supervisors, Personal and Career Development Plans;

5.14.2   All new members of staff and anyone transferred or promoted will be given the appropriate training;

5.14.3   Self-development should be encouraged to the extent where employees can share the responsibilities for their own development;

5.14.4   Employees will be released or sponsored for further education whenever appropriate, according to the Bitou Municipality's bursary fund policy;

5.14.5   Identify and make use of opportunities for his/her ETD;

5.14.6   This means commitment to achieving learning outcomes and as such a learner commitment form will be signed before gaining entry to any learning programme;

5.14.7   Acquiring of competencies does not presuppose entitlement to any position or additional remuneration, but equips employees with the competences to perform better as well as to compete for positions when they become available;

5.14.8   Trainee will finish training that he/she has been nominated for, failing which he/she will be responsible for costs involved. Trainees will be required to sign learner agreements and commitment form; and

5.14.9   It is required of learners to abide by the course learning schedule in order to optimize learning. No learner shall be allowed to claim overtime for education and training interventions.

5.15 TRAVELLING AND DAILY ALLOWANCES

5.15.1 <mark>All Bitou Municipality employees and councilors shall receive the same travelling and daily allowances to and from training, as prescribed in the Travelling and Subsistence Allowance Policy **and shall be paid from their respective departmental Travelling and Subsistence Allowance U-key;**</mark>

5.15.2 Employees must be in possession of <mark>an authorized</mark> *Municipal license to* qualify to drive a municipal vehicle. Alternatively, arrangements will be made for those who are not in possession of a municipal license;

5.15.3 The training budget and grants received from LGSETA will purely be used for tuition and training purposes and all directorates will have to budget for their employee's daily and travelling allowances; <mark>and all the logistical arrangements.</mark>

5.15.4 No daily allowances will be paid to employees who do apprenticeships,

5.15.5 Learnerships and courses exceeding one month; and

5.15.6 No catering arrangements will be granted for all training courses conducted within the jurisdiction of Bitou Municipality, employee/ learners must make provision for their own lunch.

6. IMPLEMENTATION FRAMEWORK AND OPERATIONAL GUIDELINES

6.1 THE CHALLENGES

6.1.1. The need to achieve a sufficient increase in productivity and improved service delivery through the investment in the education training and development of staff;

6.1.2. The need to develop a system of education, training and development that is accessible to all levels of personnel, and capable of meeting individual and organisational specific and distinctive needs; and

6.1.3. The need to replace the current fragmented system of ETD with a more coherent and coordinated one, without resorting to a highly centralized and prescriptive framework that could easily stifle initiative and replace one set of inefficiencies with another.

6.2. PRIORITISATION

In order to be relevant to operations and ensure that ETD programmes are tailored effectively to meet local needs and circumstances all, Directorates and Sections should set their own priorities for education training and development. These priorities have to be aligned to be broad national training priorities laid down for the short term to medium term in the performance imperatives as defined by the Mayoral Committee and Senior Management;

6.2.1 ETD programmes bases on an objective and systematic assessment of company and individual needs will succeed in building motivation, capacity and performance of Bitou Municipality employees;

6.2.2 All ETD interventions should be based on objective and systematic individual employee and organizational needs assessment.

6.2.3 The needs identified by individuals might be personal, performance related or career whilst organizational needs will be based on strategic objectives;

6.2.4 Due to budgetary constraints not all the needs will be catered for thus a transparent decision-making mechanism based on priorities for transformation, specific strategic planning priorities and circumstances should be done. There must be a drive to seek optimal balance

between individual needs and organizational priorities. Potential conflicts may arise between the needs of different individuals needs and between organizational and individual needs; and

6.2.5   To get a precise analysis of individual needs and organizational needs, each portfolio needs to assess, describe and define the occupational categories that exist within each directorate. The description of jobs within each occupation should be based upon the portfolio's strategic intent as outlined in the Organisational Strategic Plans.

6.3   LEARNING PRINCIPLES

The ETD policy has been developed in accordance with the following learning principles:

6.3.1 **ACCESS AND ENTITLEMENT TO TRAINING AND DEVELOPMENT**

The Directorates should create and make accessible on an ongoing basis, meaningful ETD opportunities for staff.

6.4   NEEDS BASED TRAINING

For training and development programmes to have meaning and to assist the Directorates in achieving its objectives the duties and responsibility should be based on a detailed assessment of individual/*Directorial* and occupational needs.

6.5   COMPETENCY BASED TRAINING

ETD should be aimed at developing the competencies required for effective job performance. For this reason, ETD should also be based on competencies required to perform various jobs and execute various functions within the Directorate.

6.5.1 **Alignment Of Staff EDT with the Organisational Strategic Plan**

Staff ETD is central to effective and successful implementation of the division's strategic plan or business plans. To achieve the Directorate's objectives, the ETD of staff should be aligned with the Directorate's strategic plan and the business plans of the various sections.

6.6 ADEQUATE FINANCIAL RESOURCES

ETD and the Directorate objectives cannot be achieved without provision of an adequate training budget. A training budget should be an integral part of the organizational budget. All grants received from the LGSETA must be utilized for Training and Development as per legislation. Bitou Municipality will, as required by legislation commit 1% of its total payroll each financial year towards education training and skills development initiatives in the form of training of budget.

6.7 CAREER PATH PLANNING

To facilitate development and progress of staff, career paths within the Directorates and Sections should be developed, with a parallel learning pathway.

6.8 LEARNING ORGANISATION

To address its client's needs, the Directorates need to continuously identify and adapt to the changing needs. This is not only vital for the Directorate's continuous growth but is equally important for lifelong learning and continuous development of staff in the Directorates.

6.9 EQUITY AND EMPOWERMENT

Training initiatives in the Directorates should be aligned with the broader plans and programmes aimed at promoting equity and empowerment of the previously disadvantaged groups. For this reason, it is of vital importance that the Directorate

strategy is aligned with the employment equity plan as well as its recruitment and selection policies.

6.10 FUNCTIONAL MAPPING AND JOB PROFILING

Functional analyses will be conducted. This entails the functional mapping by analyzing the work in terms of core and support work processes and forms a basis for identifying units of competence and best practices that could be used for establishing competitive edge and standards.

6.11 COMPETENCY PROFILES: A COMPETENCY-BASED APPROACH TO EDUCATION, TRAINING AND DEVELOPMENT

For the purpose of this ETD implementation guidelines for competence will be defined as the application of skills, knowledge and attitudes to tasks or a combination of tasks to standards under operational conditions. Such competence does not refer to the unique characteristics of an individual worker, but rather serves as a measure against which individuals may be judge for the purpose of formal or informal evaluation and accreditation.

6.12 COMPETENCY STANDARD DESCRIPTIONS FOR PERFORMANCE REFERRING TO:

What competencies do people need, to be effective in their job?

How does an individual know that she or he is carrying out the job effectively?

6.12.1 Standards are expressed as a desired outcome of the competence or a set of performance criteria/standards, which are observable, measurable and assessable;

6.12.2 A competency profiling methodology (as a tool) should be utilized to identify specific outcomes per job category, and the outcomes will be linked to SAQA unit standards;

6.12.3 The competency-based approach will assist in forming an effective and measurable basis for:

6.12.3.1 The objective evaluation of current performance, and the effective assessment of current and future needs;

6.12.3.2 The design and delivery of ETD programmes and courses, as well as other staff development interventions, targeted at the achievement of specific and meaningful competencies;

6.12.3.3 The standardization and accreditation of such programs and courses through the NQF framework; and

6.12.3.4 Improvements in the current systems of performance appraisal, recruitment and selection, and promotion which places too much emphasis on the possession of formal qualifications and experience (which may not always be a reliable indicator of actual competency), and too little on prior learning and experience obtained through less formal means. This does not imply that formal qualifications and experience will no longer be used as a criterion for recruitment or promotion. For many positions within the different divisions of Bitou Municipality, the possession of appropriate qualifications and/or experience will continue to be essential.

6.13 ETD NEEDS ASSESSMENT

6.13.1 ETD needs analyses should be conducted every 5 years at the same time as the development of WSP and drafting of budget occurs;

6.13.2 Pre-assessment training analysis is important so that staff at more or less the same level attend the same courses, to avoid embarrassing situations or boredom at some courses, due to lack of pre-assessment, by the convener of the session in conjunction with the service provider;

6.13.3 Assessment of individual learning needs will be done on a continuous basis as part of the performance reviews. ETD will need to be systematically needed to the broader processes of human resources development; and

6.13.4 The needs assessment process will ensure that the Workplace Skills Plans and Learning Programmes identifies as the result of the Learning/ETD needs assessment are effectively prioritized, equipped with the appropriate levels of budgetary support, and provided with the necessary commitment and support from the top management to ensure their success.

6.14 THE PROCESS WILL BE AS FOLLOWS:

6.14.1 Needs assessment (Individual and Organizational);

6.14.2 Consideration of possible solutions (including ETD and other non-ETD interventions);

6.14.3 Identifying ETD programmes and activities, together with their costs;

6.14.4 Establish priorities in the light of prevailing budgetary constraints;

6.14.5 Identifying appropriate resources (human, physical and financial) to implement the prioritized ETD Programmes;

6.14.6 Formulate, communicate and implement an annual Workplace Skills Plan (strategic plan) for ETD; and

6.14.7 Monitor, evaluate and feedback into ongoing process of planning and review.

6.15 ASSESSMENT AND MODERATION INCLUDING RECOGNITION OF PRIOR LEARNING (RPL)

6.15.1 A skills audit tool should be devised to allow for the assessment of employee productivity improvements, viz:

6.15.2 Individual competence against current job profile;

6.15.3 Individual performance against current job profile; and

6.15.4 Individual work environment effectiveness.

6.16 INDIVIDUAL/PERSONAL DEVELOPMENT PLANS (IDP'S OR PDP'S)

6.16.1 In order to ensure a needs-based approach to ETD, Individual Development Plans (IDP's) will be drawn up (where feasible and appropriate) for all members of staff.

6.16.2 These will be designed to identify the needs of staff within the context of the individual's overall career progress, as well as within the context of the organizational objectives and priorities of the Directorates concerned;

6.16.3 An IDP is an individually tailored programme of staff development, training, education and support designed to enable staff to acquire competencies that will need to be developed to enable staff to successfully meet their current work and career targets as well as future personal and career aspirations;

6.16.4 IDP's will be drawn up in a negotiated way between the line manager/supervisor and the individual staff member, with the assistance of the training component. They will be reviewed quarterly and will be formally appraised and updated on an annual basis; and

6.16.5 The effective implementation of an IDP is subject to the budgetary constraints, time and capacity within each Directorate and Section.

6.17 RECRUITMENT AND SELECTION OF LEARNERS/TRAINEE

6.17.1 Not only applies to full time or part time personnel, but also individuals identified for training:

This training will be based on the following triggers, viz:

a) New entrants;
b) Promotions;
c) Transfers;
d) Appraisals;
e) Accidents;
f) Qualification plus Control Records;
g) Grievances;
h) New positions;
i) Special Assignments;
j) Job descriptions;
k) New Products;
l) New machinery;
m) Succession planning;
n) Career pathing;
o) Employment Equity; and
p) Learnerships etc.

6.18 STANDARD SETTING AND QUALIFICATIONS

6.18.1 The move to a needs-based and competency-based system will require new and improved forms of standard setting and qualifications;

6.18.2   The processes, procedures and systems as prescribed by the relevant legislation   guide Bitou Municipality's actions herein; and

6.18.3 The relevant SETA (s) provides the required guidelines.

6.19   ACCREDITATION AND QUALITY ASSURANCE

As per SETA guidelines and requirements.

6.20   OUTSOURCING OF ETDS INITIATIVES

Outsourcing will only take place in the following situations: -

6.20.1   Non-availability of such training in the Bitou Municipality;

6.20.2   Cost effectiveness and economics of scale;

6.20.3   Capacity constraints;

6.20.4   In line with Bitou Municipality Procurement Policy and where possible with a skills transfer

6.20.5   contract; and

6.20.6   The SDF's role will also be to monitor such ETD initiatives to ensure that it conforms to national criteria and standards.

6.21   TENDERING

6.21.1   The increasing reliance envisaged in this document on external ETD providers would obviously place growing pressure on tender processes and procedures as per Council's Supply Chain Management Policy.

The tender processes in Directorates will need to ensure in particular that:

6.21.2   Clear and relevant criteria are established;

6.21.3   These and other information relevant to the tender are appropriately advertised in ways that solicit a response from a diverse range of providers, and in particular from organisations that have been previously disadvantaged, with preference to accredited providers within the Drakenstein area;

6.21.4   Bids are assessed in an objective, non-discriminatory and transparent way;

6.21.5   The introduction of a more systematic framework for accreditation will imply that tenders will only be invited in the future from accredited providers in consultation with the Procurement, Human Resource Manager and the SDF;

6.21.6   A need may arise from time to time for a small group of individuals to receive short-course or workshop training on a once-off basis from particular provider with acknowledges expertise in the specific field. To submit such once-off events through the revised tender procedures may still be unnecessarily expensive, slow and cumbersome. It is therefore proposed that the Procurement Section draw up criteria for ETD interventions, which can be excluded from the tender process; and

6.21.7   ETD service providers chosen to run such interventions will nevertheless, still be required to demonstrate accreditation status to the SDF.

6.22   THE CODE OF CONDUCT FOR SUPPLY CHAIN MANAGEMENT NEEDS TO BE ADHERED TO:

All officials and other role players involved in Supply Chain Management must adhere to the National Treasury's Code of Conduct of Supply Chain Management Practitioners. If a supply chain management official or other role player, or any close family member, partner or associate of such officials or other role player, has any

private or business interest in any contract to be awarded, that official or other role player must:

6.22.1   Disclose that interest; and

6.22.2   Withdraw from participating in any manner whatsoever in the process relating   to that contract

6.23   TYPES OF ETD

6.23.1   An approach will be designed to promote access to competence and accreditation by recognizing that there are many different routes to obtaining knowledge and skills, and that the choice of "best route" for an individual will depend on a variety of circumstances, including the experience and learning that have occurred to date (recognition of prior learning); and

6.23.2   A key assumption of this approach is that their learning will be more effective when individuals are enabled to use learning styles and contexts that more closely match their needs.

6.24   LEARNERSHIPS AND SKILL PROGRAMS AS PER SETA GUIDELINES AND REQUIREMENTS FOR DEVELOPMENT INITIATIVES

The attendance by employees to seminars, workshops and conferences must be job related. The directorate will sanction such attendance and the cost thereof will be borne by the directorate.

7.   BUDGET

7.1   Since 1 July 2004 the Bitou Municipality could no longer provide employees with study loans. This is a forbidden practice according the Municipal Finance Management Act.

7.1.1   Adequate budgetary allocations within each directorate should be secured to ensure financial provision for adequate implementation of

the new ETD policy, and to ensure that ETD budgets are not the first thing to be sacrificed in times of financial stringency. A formula should be developed by the Human Resources Directorates in collaboration with the Training Committee, for implementation in Directorates and Sections. This will be based on agreed norms and standards in relation to;

7.1.2 The time to be made available for training and education;

7.1.3 A specified financial target for training and education; and

7.1.4 A more sophisticated formula should be developed; as more reliable data becomes available. Once the annual ETD budget is approved AS PER WSP, it will be up to the HOD's to implement the agreed ETD strategy.

7.2 CONTRACTUAL OBLIGATIONS

7.2.1 Learners/trainees shall be required to comply with Bitou Municipality stipulated policies and contracts for:

(a) Bursaries;

(b) Learnerships;

(c) Specialised Training; and

(d) Any other initiative as governed by Company policy.

7.2.2 All costs in respect of training are to be budgeted for at the Training Committee in conjunction with the (Executive Directors) and functionaries and be indicated by specific allocation for various Directorates, including the Fire Section and Traffic Section.

7.2.3 Learner Commitment Forms will be completed by each learner approved to attend as part of avoiding wasteful expenditure that come with unauthorized learner dropouts.

7.3 TRAINING BUDGET AND LEVIES

7.3.1 Training and development must be budgeted for on an annual basis of 1% of the Council's total salary expenditure;

7.3.2 The Training Division will be responsible for coordinating expenses to ensure the optimal utilization of training funds; and

7.3.3 A Training Levy will be paid to SARS as per SETA requirements.

7.4 COMMUNICATION ON ETD

7.4.1 Poor communication, conflicting information and a lack of co-ordination of ETD between and among different levels of employees within the organisation and providers usually complicate training delivery. To carry out their work effectively supervisors and managers will be orientated, trained and supplied with ongoing advice and support by the Human Resources Section;

7.4.2 To provide information on training and development opportunities to various ETD Stakeholders/users, the newsletter will be used as a powerful tool for this purpose. A resource guide will be developed on the intranet, maintained and be made accessible to staff; and

7.4.3 The introduction of this central database for human resource development and ETD related matters would facilitate information sharing and dynamic interchange. It should be continuously updated to meet clients' information needs.

The information systems will be used as an ETD management tool and it will, inter alia, store the following:

a) List of providers, products and schedules;

b) Skills/Knowledge/Provider Matrix;

c) List of Qualifications and Unit Standards offered;

d) An indication of accreditation;

e) Alternative development opportunities; and

f) Self-study, on-job-training, videos, literature, etc.

7.4.4 Given the need to ensure that the training and education strategy proposed in this document is effectively integrated into NQF and SAQA frameworks, as well as into Directorate of Labour's National Skills Development Strategy (NSDS), an additional priority will be to arrange workshops and training courses for managers and staff (HR managers and staff in particular) in the operation of such things as the NQF, SAQA, National Standards Bodies, Standards Generating Bodies, Education and Training Quality Assures (ETQA's), Sectoral Education and Training Organizations (SETA's), and Learnerships and Skills Programs.

7.5 SYSTEMS

The following needs to be considered*:*

7.5.1   Library – Knowledge and Resource Centre;

7.5.2   Performance Management System (regular reviews);

7.5.3   Job and Competency Profiling for all disciplines (upgrading of skills/competency shortages);

7.5.4   Skills database (continuous evaluation and re-evaluation of grades and Skills transfer);

7.5.5   Programme management – key performance areas (KPA's); and

7.5.6   Balances scorecard (BCS) and business planning (return on investment and increase productivity).

7.6 QUALITY MANAGEMENT PROCESS

7.6.1 All ETD interventions must be reported according to stipulated guidelines as determined by the relevant SETA;

7.6.2 Regular and continuous reporting of ETD undergone at Sections/Directorates to be sent to the SDF;

7.6.3 Annual Training Evaluation reports to identify ETD provided against training WSP's submitted at the beginning of the ETD cycle as per SETA requirements;

7.6.4 Budget reviews to assess cost of ETD and money actually spent on ETD against budgeted amounts;

7.6.5 The impact and effectiveness of the ETD Programmes and courses will be evaluated through customer reviews at two different levels:-

a. At the levels of recipients of these Programmes (employees) through the improvements of their performances.

b. At the level of the public or the beneficiaries of the goods and services provided by the particular directorate with regards to improvements in service delivery.

This would help to reconcile employee learning/ETD needs with the broad aims, objectives and goals of the Directorates. Congruity between training courses and the actual competencies required in performing effectively at the particular level is greatly emphasized. Wherever possible, this should be linked to the NQF framework.

7.7 MONITORING AND EVALUATION OF THE IMPLEMENTATION OF ETD POLICY

7.7.1 To ensure that the implementation of the ETD policy is effectively monitored and evaluated in accordance with realistic and relevant performance measures, targets and time frames, effective systems of monitoring and evaluation will be introduced and implemented in Directorates/Sections;

7.7.2 Detailed performance measures and the actual monitoring and evaluation mechanisms specifying mechanisms for ensuring compliance will be put in place; and

7.7.3 Monitoring data (both quantitative and qualitative) will be interpreted sensitively, rather than being used in an over-simplistic way as conclusive proof of success or failure. Such date will instead be used to try and obtain a realistic view of improvement of investigation.

8 **TRAINING: WORKING HOURS**

8.1 Study leave will be granted for an employee one day before an exams or evaluation and on the day of the exams or evaluations; Study leave will be regulated in accordance with current Collective Agreements and /or Leave Policy;

8.2 Employees attending block weeks, will be granted 50% study leave and 50% vacation leave, for example a two-week block will be, one-week study leave and one week vacation leave;

8.3 All relevant documentation for study leave must be signed one week in advance and must be accompanied by an exam time-table; and

8.4 All other training coordinated and presented through the training component will be conducted during working hours, and therefore the relevant Directorates should release personnel.

9 **UTILISING RESOURCES**

Training and development will be undertaken with all available resources, namely Council's own personal, official regional structures, private service providers, in addition to personnel from other local authorities.

10 **PROFESSIONAL MEMBERSHIP FEES**

10.1 In order to ensure retention and effective management of a capable workforce that is relevant to improved service delivery requirements, the municipality supports employee affiliation to a single professional

body. The professional body should be recognized by the South African Qualifications Authority or at least be in process of acquiring such recognition.

10.2   Employees should obtain approval from the respective Manager and Executive Director before undertaking professional body application processes.

10.3   Professional body membership (statutory and non- statutory) may be considered and/or approved for permanent personnel only if it is applicable to the Local Government sphere and subject to the following conditions:

10.3.1   The membership is relevant to the employee's current position and/ or potential future career development as secondary priority;

10.3.2   Any future projects or Council objectives which the membership may impact upon;

10.3.3   Employees may only apply for membership to a single professional body or alternatively cover additional membership costs should he/she affiliates to more than one professional body; and

10.3.4   Employees will be required to enter into an agreement with the municipality which requires them to pay back 100% of Council's membership contribution should they leave Council's employment within six months service following the purchase of the membership.

10.4   Professional membership is inherently developmental and will be funded through the Local Government Sector Education and Training Mandatory funding.

11 STUDY BURSARIES FOR BITOU MUNICIPALITY EMPLOYEES

11.1 ELIGIBILITY FOR STUDY ASSISTANCE

11.1.1 All employees shall be eligible for study assistance subject to the provisions of this policy within the categories as determined herein;

11.1.2 Types of skills development programmes:

11.1.2.1 A municipality must focus on developing priority skills through;

(a) Structured learning programmes, which may include learnerships, apprenticeships, technicians-in-training programmes and graduates-in-training programmes;

(b) Structures on-the-job learning and development, which may include;
- (i) Professional coaching of staff members by an external or internal expert coach, where such capacity exists;
- (ii) Coaching of staff by supervisors, including guiding a staff member to develop new skills;
- (iii) Mentoring staff to acquire technical, professional or specialist skills, which may include structured mentorship programmes;
- (iv) The creation of work exposure opportunities that may accelerate learning and or skills development, including-
  - (aa) Allocating staff members- to a specific project;
  - (bb) Seconding a staff member to another department or work area to increase the staff member's exposure to other work processes and systems;
  - (cc) Increasing the responsibilities allocated to a staff member;
  - (dd) Rotating staff through the full range of activities of a particular process or department; and

(ee) work shadowing, where a staff member is given the opportunity to observe a more senior professional or manager at work, enabling the staff member to understand more complex and challenging roles in a structured and secure manner; and

(c) Professional development programmes.

11.1.3 Obligations of Municipality

11.1.3.1 Supervisors must ensure the development of employees through re-allocation, rotation and secondment of staff members across functions within a municipality with due regard to service delivery requirements, where applicable.

11.1.3.2 A municipality must ensure the effective management of the quality of learning delivery, especially that which is provided by the external training providers.

11.1.3.3 Supervisors must be encouraged to gain coaching skills, and should actively coach and support the development of staff members who report to them

11.1.3.4 A municipality should prioritize the appointment of staff mentors who are experts in their field to support structured skills transfers to achieve the required specialist and technical skills in respect of priority roles.

11.1.4 Evaluating skills development quality impact

11.1.4.1 A municipality must

(a) Conduct regular evaluations of the workplace skills plan and personal development plans as well as their implementations: and

(b) Adjust its learning programmes to improve its effectiveness, including the impact on reducing the skills constraint on service delivery.

11.1.4.2 A municipality must ensure that

(a) Every supervisor annually reports on progress on implementing staff personal development plans and the other programmes contained in the workplace skills plan;

(b) The effect of implementing personal development plans for staff is evaluated;

(c) Evaluation, using standard benchmarks determine by the Minister, respond to priority learning programmes and contribute to the development of skills which results in improved performance and service delivery; and

(d) Regular skills development reports and evaluations results are

    (i)   Integrated into the wider capacity building initiatives within the municipality: a

    (ii)   Reported to the relevant provincial and national capacity building structures.

11.1.5 Conditions of Payment

11.1.5.1 A municipality may agree to pay the full amount for, or part of, a staff member's learning programme and for reasonable travel and accommodation expenses or receipt of official proof of the structured learning programme as per the municipal training policy.

11.1.5.2 A municipality which agrees to pay for a learning programme must require the staff member to work for the municipality for a period equivalent of the course funded after the completion of the programme, failing which the staff member must pay back the costs, or part of the costs, associated with the programme.

11.1.5.3 Despite sub-regulation (1), if a staff member fails to attend or fails a learning programme, the municipality must recover the costs associated with the programme after complying with section 34 of the Basic Conditions of Employment Act

11.2 CRITERIA FOR CONSIDERATION OF APPLICATIONS

11.2.1 All applications must be assessed, subject to availability of funds, to comply with all of the criteria set out below:

11.2.2 Applicants must be permanently employed employees of Bitou Municipality. Part time or contract officials may be considered provided that their term of appointment exceeds the intended study period and the amount of time that students is set to work;

11.2.3 Applicants who show deserving past study performance in terms of good results/ previous study record relevant subjects and meeting the minimum entry requirements to the field applied for;

11.2.4 That the field of study have a relationship or is applicable to the functions and activities of Bitou Municipality;

11.2.5 That the studies and applicable institution are accredited and studies are taken on a part time basis only;

11.2.6 Honours degrees, Masters programme will be considered and funded by Bitou Municipality.

11.2.7 No doctoral degrees will be considered; and

11.2.8 Applicant must submit his/her senior certificate where applicable including his/her current formal qualifications and past year study results.

11.3 PRIORITY OF APPLICATIONS

Bursaries will be allocated according to the underneath prioritization:

11.3.1 **Primary Priority**

11.3.1.1 Employees who want to study towards their first qualification (ABET including) up to and including NQF level 4 (Grade 12;

11.3.1.2 Employees whose study fields are within the scarce and critical skills categories within the **Bitou Municipal Workforce** as determined the Municipal Manager;

11.3.1.3 Applications where the study field has direct relation with the applicant's post or occupation at Bitou Municipality up to NQF Level 7;

11.3.1.4 Applications where the field of study lead to obtaining a qualification which conforms to the applicants' post or occupation requirements up to NQF level 7;

11.3.1.5 Study fields in keeping with the Integrated Development Plan;

11.3.1.6 Employees with disabilities;

11.3.1.7 Employees who are currently in receipt of a bursary and must still complete their qualification;

11.3.1.8 Employees from designated groups in order to enhance skills development in terms of employment equity measures provided for in the Employment Equity Policy of Bitou Municipality;

11.3.1.9 Studies towards qualifications in terms of a progression policy of Council; and

11.3.1.10 Employees who want to study for self-development within the context of local government.

11.4 APPLICATION PROCEDURE

11.4.1 All applications for bursaries must be submitted on the prescribed application form and be accompanied by written support of the applicant's line manager

11.4.2 Application must be signed off and supported by the applicant's Director.

11.4.3 The Skills Development Facilitator must verify the information in the application to submit to the training committee for scrutinizing and to make a recommendation to the Municipal Manager.

11.5 FINANCIAL SUPPORT: INTERNAL BURSARIES

11.5.1   Bitou Municipality sets to cover study tuition costs as provided by the institutional invoice supplied.

11.5.2   The bursary amount may be used towards registration fees, book fees, class/tuition fees, and compulsory class attendance and examination fees.

11.5.3   No travelling, subsistence or general expenses will be funded

11.6 STUDY LEAVE

Study Leave and Special leave will be granted as per the applicable SALGBC Collective Agreement as amended time to time.

11.7 CALLING FOR APPLICATIONS

Circulars will be sent out during September/October of each calendar year so as to afford officials who intend to study, to make application for study bursary. The circular should indicate the study fields in which there are shortages.

11.8 GENERAL CONDITIONS

11.8.1   When an employee exceeds the prescribed number of years for the period of the course, he/she must submit a written application for the extension of the duration at Human Resources. Approval of an application for the extension, rest with the Municipal Manager.

11.8.2   The awarding of bursary does not give an official automatic preference in terms of advertised/vacant/promotions post.

11.8.3 A Learnership Agreement must be in the prescribed form, in terms of the Skills Development Act.

11.8.4 Bitou Municipality bursary holders will be prioritized on application for experiential learning, but no placement will be guaranteed.

11.8.5 The employee will be required to enter into an agreement with Bitou Municipality and to remain in the service of Bitou Municipality for a period equal to which study assistance was granted. The service requirement shall run after acquiring the qualification. The above liability is not applicable in instances of death, ill health, incapacity or temps.

11.8.6 In the case of changes in study course, or registered subjects, an application must be directed to Human Resources accompanied by full reasons and motivation. Such application will be considered by the Municipal Manager. Employees who wish to withdraw on the agreement will have to reimburse the monies paid for the remaining years stipulated on the agreement.

11.8.7 The duration of studies may not be longer than what is recommended or determined by the rules, regulations or requirements of the relevant institution.

11.8.8 The municipality reserves the right to reject the claim if the expenses attached to the claim are deemed to be out of order, provided full reasons are furnished.

11.8.9 Payments are made directly to study institutions. The first payment is made after the submission of proof of registration. Further payments will be made only on receiving of report/results from the relevant institution to monitor the progress of the bursar.

11.8.10 <mark>Bursars who fail a study year will forfeit any further study assistance and will be required to reimburse the municipality on all monies paid on their behalf or subjects/modules.</mark>

11.8.11 <mark>For all temps/fixed term employee, the municipality reserves to at any time to terminate an employee's employment period irrespective of whether the employee has entered a contract.</mark>

11.8.12 <mark>All monies owed by the employee to the Municipality in terms of his/her study aid contract on termination of service will be subjected to the provision of Section 37 of the Basic Conditions of Employment Act (Act 75 of 1997) and such monies will be deducted from his/her salary or pension payments.</mark>

11.9   RESPONSIBILITIES

The undermentioned role-players have the responsibilities set out below:

11.9.1   Applicant:
(a)   Familiarizes him/her of the content of the bursary;
(b)   Make sure that the study field is relevant to the set criteria;
(c)   Make sure that all documents are complete and correctly furnished; and
(d)   Make sure that all documents are submitted on time.

11.9.2   Line Manager / Director:
(a)   Familiarizes him/herself of the content of the bursary rules;
(b)   Make sure that the study field is relevant to the criteria;
(c)   Ensures that the study field is relevant to the applicant's job requirements and give recommendation; and
(d)   Ensures that all documents are accurately completed and signed.

11.9.3   Human Resources: Training and Development Section:
(a)   Bitou Municipality administer the bursary;

(b) Submits the program budget to the Human Resources Development Sub- committee;

(c) Co-ordinates a meeting for the selection of applications;

(d) Submits recommendations as to eligibility to the Human Resources Development Sub-committee;

(e) Keeps complete records of all applications, agreements, payments and other relevant documentation;

(f) Communicate with applicants and bursars;

(g) Ensures that observatory status of unions is maintained; and

(h) Coordinates the Bursary Award Ceremony.

11.9.4 Municipal Manager:

Considers approval of bursary applications.

11.9.5 Director- Corporate Services:

(a) Signs off the bursary agreements; and

(b) Provides input as part of the process.

11.9.6 Financial Services Directorate:

(a) Pays the bursary;

(b) Keeps the records of expenditures incurred; and

(c) Assists the Human Resources with the submission of the budget.

7. AMENDMENTS

The Council may from time to time amend this policy and introduce any measure(s) to ensure efficient, economic and effective management of Council resources.

8. COMMENCEMENT

This policy comes into force on the date which it is adopted by Council.