

CONDITIONS IN APPLYING FOR FUNDS FROM THE CONTINUING EDUCATION FUND

A. Nature of this Fund

The Continuing Education Fund has been established to primarily assist support staff who wish to further their formal education. The purpose of this budget is to assist staff with tuition fees for part-time studies leading to a formal qualification.

This budget needs to be differentiated from the *Ad hoc Training Fund* which pays for special training needs. The differences between these funds are three-fold. Firstly, the Ad hoc Training Fund pays for training which is usually skills based. The Continuing Education Fund pays for formal education that is usually more theory/knowledge than skills based. Secondly, whilst training courses may be certified, they do not normally lead to a formal qualification. The Continuing Education Fund is to pay for studies that lead to a formal qualification such as a diploma, certificate or degree. Thirdly, training courses are usually of shorter duration than formal education courses. If you are still uncertain as to which fund to apply for, please consult the HRD Office on extension 8239.

B. Definitions

- **Grant:** If an application is successful, a grant is awarded. A grant is equivalent to 75% of the cost of the tuition fees of a qualification up to a maximum of R6500 per annum.
- **Loan:** The staff member may request a loan from the University to pay for the 25% of the cost. This shall refer to the amount and interest, calculated at the standard University rate.
- **Approved Course:** In order for the proposed course to be approved it must (i) lead to a recognised qualification (e.g. certificate, diploma or degree), (ii) be at a reputable educational institution, (iii) be job related such that the knowledge and skills gained can be used within the work context within a reasonable period and (iv) normally, last longer than three months.
- **Staff Member:** In the context of this document, this shall refer to a member of the University staff appointed to a permanently established post. This funding is not usually given to contract staff but an interested applicant is asked to contact the HRD Office to discuss the options available to them.
- **Tuition Fees:** Tuition fees refers to the fees payable to the educational institution by a registered student and shall normally exclude extraneous fees and charges such as books, examination fees, charges for the use of equipment and so forth. The initial registration fee will be paid as part of the tuition fees.
- **Service Contract:** A service contract refers to a signed undertaking by a staff member to remain in the employ of the University for a fixed period as determined by the size of the grant. Normally, the staff member will be required to work a month for each R375 awarded in the period following the completion of the qualification or year of study for which the grant was made.

C. General Principles

• **Approval of the Application**

The University does not usually consider retrospective applications i.e., of staff members who on their own registered for a qualification and upon completion, request that the University covers the cost thereof. The University prefers to be part of the decision taken by the individual to further their studies and thus will usually only consider applications prior to the registration of the staff member for a particular qualification.

Where a staff member wishes to do a formal qualification lasting more than 12 months and the application has been approved, the University will continue to pay for the studies of that individual until they have completed the qualification provided that he/she passes all subjects on an annual basis. In this case, staff do not have to reapply for funding but should merely submit their results and an invoice for the costs of the courses to be done in the following year.

• **Eligibility of Staff Members**

Whilst this Fund has been established primarily for support (non-academic) staff, academic staff can apply. However, if a similar or equivalent degree can be done at Rhodes University, the application is unlikely to be successful unless a strong motivation for doing the qualification is provided. This applies to both support and academic staff.

- **Payment of Tuition Fees**

Monies will not usually be given directly to a staff member to pay for tuition fees unless they have paid the educational institution directly. The University, on behalf of the staff member will issue a cheque or conduct an electronic transfer for the full cost of tuition, payable to the relevant institution. This cheque will usually be given to the staff member for forwarding to the educational institution with his/her registration or the HRD Office will do this on their behalf. In the event of processing payment electronically, proof of payment will be sent to the institution and a copy to the staff member concerned. The University will not accept liability for additional course costs incurred by the staff member. Staff members who fail to complete their studies and/or leave the employ of the University will be required to repay the monies that the University has paid on their behalf i.e. the 75% or a portion thereof.

- **Conditions of Payment of Tuition Fees**

Whilst the University will pay the total tuition fees due, the staff member will be liable for the payment of 25% of the cost of tuition. The other 75% of costs is converted into a grant, awarded to the individual.

In repaying the other 25%, the staff member has the following options:

1. The staff member may be granted a loan with interest from the University, payable within 12 months, provided the individual does not already have a loan from the University.
2. A deduction from one's salary in the month when your bonus is due. (Interest is charged until the date of payment/bonus).
3. Full payment in cash.
4. A deduction from the individual's research account where this is feasible namely, for academic staff.

If the staff member should elect to apply for a loan, he/she should bear in mind the following:

- The loan will be repayable in installments which will be determined by the length of the course, the amount of the tuition fees and the individual's net salary but would normally not be repayable over more than 12 months.
- Only one loan will be granted at a time. This includes loans for other purposes. No further applications will be considered until such time that the loan is repaid in full. In the case where a staff member has registered for a course of more than one year, annual applications must be made for renewal of the loan.
- Should a staff member with such a loan leave the employ of Rhodes University for any reason before the end of the course, the full amount outstanding on the loan will be repayable.
- S Continued assistance or application for a loan for a new course, will only be considered on proof of results deemed by the University to be satisfactory.

- **Registration:**

The staff member is responsible for ensuring that his/her application reaches the institution before the closing date. Whilst the HRD Office will process applications as efficiently as possible, delays are often experienced from staff not returning the relevant documentation timeously eg loan forms, invoices indicating costs of the course, service contracts etc. Please note that no payments will be made to institutions unless the relevant documentation is returned to the HRD Office. Staff must allow sufficient time for the HRD Office to process documentation and request for payment from Finance and provide proof to the institution of such payment. From the time of staff member handing in documentation (service contracts, loan agreements etc), at least 8 working days must be allowed for this administration.

Staff are encouraged to send their application forms to relevant institutions before they know whether or not their applications for funding have been approved. If the application for funding is approved, the HRD Office will reimburse staff for the admission fee. If the application for funding is not approved, admission fees would be for the staff member's account.

D. Management Support

Given that only job-related courses (current or future) will usually be approved, it is critical that the staff member discuss his/her intention to study further with his/her immediate supervisor or manager. The manager/supervisor will be required to comment on the suitability of the proposed course and how the knowledge and skills gained from the proposed course can be transferred into the workplace. Where the course may involve an element of practical work, the details of this will have to be discussed and decided on by the manager/supervisor and staff member. Where the immediate supervisor or manager is not the Head of Department/Division/Institute, the Head will also be required to sign the application.

E. Process of Applying:

- Collect an application form from the HRD Office or access it from the HR Division website. http://www.ru.ac.za/administrative/hr/human_resources_development/cont_education.html. Read through the information in this document.
- Discuss your application with your immediate Supervisor/Manager.
- A completed application must be submitted by Mon, 15 November 2004. Please complete the form in sufficient detail. Incomplete application forms will be returned, which may result in your application not being considered.
- You will be informed of the decision of the committee by the last week of November. Should your application be successful, the HRD Office will liaise with you regarding the financial arrangements and registration.
- Should you require further assistance regarding this application form, please contact the HRD Office on extension 8239 or e-mail hrd@ru.ac.za.



RHODES UNIVERSITY

DEADLINE FOR APPLICATIONS IS 15 NOV. 2004

**HUMAN RESOURCES DIVISION
APPLICATION FOR FUNDS
FOR CONTINUING EDUCATION**

Please read the conditions for applying for these funds before completing this form.

1. PERSONAL AND WORK DETAILS

Surname/Last Name: _____ First Name: _____

Job Title: _____ Department: _____

Work Telephone No: _____ E-mail address: _____

Name of Immediate Manager/Supervisor: _____

Length of time in current job: _____ Nature of job: Permanent or Contract? _____

Brief description of current job responsibilities: _____

Highest educational qualification – please provide a copy of your results: _____

2. EDUCATIONAL PLANS

NOTE: Please attach a copy of the educational course material including an outline of the topics/subjects to be covered, the duration of the course and the cost. Without this information, your request cannot be processed.

Qualification for which you intend to register: _____

Educational Institution: _____

Duration of the course (e.g. 6 months, 1 year, 3 years): _____

Starting Date of course: _____

Closing Date of Registration: _____

***** FOR OFFICE USE ONLY *****

Application approved? YES / NO Date: _____

(Where the qualification is longer than 12 months, this approval is for the entire duration of the qualification provided the individual meets the requirements for continued payment)

Signature (VC/VP): _____ Signature (HRD Manager): _____

Please indicate what subjects will you be taking each year in order to complete the qualification.

YEAR 1:	YEAR 2:	YEAR 3:	YEAR 4:
e.g Accounting 1	Accounting II	Accounting III	Accounting IV

Why do you wish to do this course? Please provide detailed reasons why you wish to follow this course of study.

Will you be required to attend lectures, conduct research, do a practical etc as part of this course/qualification? YES / NO

If YES, please detail what this involves and how you plan to go about meeting these requirements. (If this is to be done during working hours, this needs to be discussed with your immediate supervisor or manager in consultation with your Head of Department/Division/Institute).

Please indicate costs and details as per table below.

COSTS:	YEAR 1.	YEAR 2.	YEAR 3.	YEAR 4.
Costs of the course:				
Costs of Examination:				
Costs of Travel:				
Costs of Accommodation:				
Costs of subsistence:				
List other costs associated with the course:				
TOTAL COST:				
75% cost to RU:				
Maximum grant by RU is R6500 per annum				

Details of Expenditure:

3. DECLARATION

I am aware and accept the conditions associated with the granting of a loan to continue my formal education. I declare that the information supplied by me on this form is correct and I note that the submission of false information will render this application null and void.

(Signature of Applicant)

(Date)

Please discuss this with your immediate supervisor/manager before passing onto him/her.

4. APPROVAL OF IMMEDIATE SUPERVISOR OR MANAGER

Do you support this application? YES / NO

Please detail your reasons:

(Signature of Immediate Supervisor/Manager) _____ (Date) _____

5. APPROVAL OF HEAD OF DEPARTMENT/DIVISION/INSTITUTE

This section is only applicable where the immediate supervisor or manager is NOT the Head of Department/ Division/Institute.

Do you support this application? YES / NO

Please detail your reasons:

(Signature of HOD) _____ (Date) _____