



RHODES UNIVERSITY
Grahamstown • 6140 • South Africa

Protocol for Ad Hoc Funding

Responsible Committee/Unit/Division/Faculty	Human Resources
Responsible Chairperson/Director/Manager	Learning and Development
Date	Revised 2021
Review Cycle (e.g. every 2/5/7 years etc)	
Next Review Date	



PROTOCOL FOR AD HOC FUNDING

1. Alignment

Protocol name	Ad – Hoc funding
Effective date	1 January 2020
Process holder	Learning and Development : HR Division
Applicable area	All Council funded staff
Reference	Staff Development policy
Documentation	Approved application form and relevant documentation

2. Terms of reference of the fund

- 2.1 This fund is financially supported by the Staff Development budget.
- 2.2 *Ad hoc* training does not normally refer to training courses which may form part of Rhodes University's formal Staff Development Programmes. These courses are normally offered free of charge; nor does it refer to, formal education leading to a qualification e.g. Bachelor of Commerce Degree. There is a Continuing Education Fund for this purpose.
- 2.3 This budget is only for Council funded support staff which includes permanent full-time staff, full-time staff on contracts and part-time staff both permanent and contract. Contracts must generally be longer than a year. Depending on the circumstances line managers may motivate for staff who are on contract for less than a year but not less than 4 months to make use of Ad hoc funding.
- 2.4 Academic staff wishing to attend training to do with research e.g. a research methodology course should contact the Research Office. Academic staff wishing to attend training or conferences to do with teaching should contact CHERTL.

3. Principles governing Ad Hoc funding

- 3.1 The University will give priority to paying for training that is related to the individual's current job and that addresses a particular development need of that individual.
- 3.2 A staff member's individual development plan and job profile must accompany the application for Ad hoc funding. Failure to attach these documents is likely to result in a delay when considering the application.
- 3.3 The cost of training is seen to include:
 - The registration and course fee (please ask whether you are eligible for a discount since you are from an educational Institution);

- Travel (where the individual uses their own car, they will be reimbursed at the University rate per km. If other transport is used, the full costs thereof will be paid);
- Subsistence allowance (including accommodation and meals);
- Where an individual is staying with family or friends, the subsistence per night can be claimed. The University encourages staff to stay in Bed and Breakfast establishments rather than hotels as these are less expensive. However, should an individual be staying at the hotel where the conference is being held, this will obviously cut down on the expense of having to hire car and;
- Any other reasonable costs associated with attending the training.

3.4 Whilst no upper limit is set on the allocation of funds to any one staff member for any one course/workshop, due consideration will be given to:

- Whether a more cost effective alternative can be found;
- Where the training is to be conducted. Due to the costs associated with travel and accommodation, staff members are encouraged to attend training courses and programmes in the Eastern Cape region. The payment of airfares to other centres will not normally be approved except in rare circumstances where specialised training is only available in such centres;
- The importance of the training to the applicant's job performance; and
- Whether previous applications for monies from this budget have been successful. Due to limited funding, there is a need to provide opportunities to other staff who may not yet have benefited from the fund.
- In the case of support staff, all reasonable costs will be covered.
- Funds are usually approved and paid at the discretion of the Director: Human Resources or his/her designate.

4. Standard operational procedures associated with Ad Hoc funding

- 4.1 The staff member has to submit a full motivation (see Application for Ad Hoc Training Form) when requesting funds for training. Please note that retrospective applications where individuals have been on the training and now wish to claim for their expenses will not be considered.
- 4.2 To ensure the transfer of training back into the workplace, the staff member together with his/her immediate supervisor or manager (who may be the Head of Department/Division/Institute) have to be clear on how the training is going to benefit the individual and division/department/section/unit. This development plan will include:
- The relevance of the training course to the individual's job and personal development;
 - The benefits that the individual intends to gain from the training; and personal job-related goals set by the applicant to allow for the application of the skills and/or knowledge gained as a result of the training. These may include keeping abreast of new developments in a field, initiating a new project or work task, taking on new job

responsibilities, working to a particular standard, involvement in an ongoing project or a change in certain work behaviours.

- 4.3 The applicant's immediate supervisor or manager will also be responsible for discussing the training with the applicant after the individual's attendance to discuss how what has been learnt can be introduced or implemented back into the workplace.
- 4.4 If the staff member's immediate supervisor or manager is not the Head of Department/Division/Institute, the Head will also have to sign this form.
- 4.5 Ensure that all the necessary documentation is attached including (where applicable):
 - 4.5.1 Approved application form
 - 4.5.2 The training course or conference promotional material/pamphlet/letter/advert
 - 4.5.3 Course quotation
 - 4.5.4 Accommodation quotation
 - 4.5.5 Air tickets quotation
 - 4.5.6 Road travel / shuttle quotation or estimate
 - 4.5.7 Summary sheet reflecting all the quotations and expenditure
 - 4.5.8 General ledger account number of the department
- 4.6 A completed Application for Ad hoc Training Funds form must be submitted to HR at least 2 weeks (preferably longer) before the training/conference is due to start and/or be paid. The application will not be approved if any of the above documentation is outstanding.
- 4.7 The Financial Division will be requested by email to transfer the total amount to the applicant's departmental GL account. The email must consist of the following information:
 - The Ad Hoc GL account number from where the funding will be taken from.
 - The GL account number where the funding will be transferred to.
 - The name of the beneficiary /ies as well as the name of the training intervention.
 - The applicant and manager should be CC'ed on the email as well.
- 4.8 Once the funding is transferred, it is the responsibility of the applicant/department to do all the payment arrangements.
- 4.9 Once the intervention is completed, a following up email needs to be done to ensure all the funding was accounted for as per the quotations.
- 4.10 Should a staff member fail to attend training that has been booked and paid for and the individual is unable to provide a valid reason for his/her non-attendance, he/she will be liable for the costs associated with the training.
- 4.11 Should the staff member fail to meet these commitments, further applications for funds will not be favourably considered.