




STUDY ASSISTANCE POLICY

Policy Owner:	Botle Buhle Brands (Pty) Ltd		
Effective Date:			
Authorised by:	CEO		30/04/2024
		Signature	Date
Note:	Botle Buhle Brands (Pty) Ltd reserves the right to amend the contents of this policy as and when required. The policy currently in effect will apply to all employees regardless of the policy that applied at the time of employment.		

1. Scope/objective of the policy

- 1.1 The objective of the study assistance policy is to guide Botle Buhle Brands (Pty) Ltd, hereafter referred to as Botle Buhle Brands, to advance and grow employees in line with the organisation's strategy and business objectives.
- 1.2 Botle Buhle Brands strives to promote an organisational culture that encourages and promotes learning and development of all employees.
- 1.3 The main purpose of the study assistance policy is to ensure that the company's human resources possess the competencies necessary to meet performance and quality standards in their current roles. However, the policy also plans to contribute towards individual employees' career paths to meet their growth needs, as well as the future human resource needs of the company.
- 1.4 This policy provides for financial assistance for permanent staff members who wish to advance themselves academically. This applies to courses which will directly benefit the Employee and the company through improved productivity and enhanced competencies.

2. Definitions

- 2.1 'Workplace Skills Plan' (WSP) is a training plan submitted to the Sector Education and Training Authority (SETA).
- 2.2 'Annual Training Report' (ATR) is a training plan submitted to the SETA indicating the completed training for the previous year.
- 2.3 'Continuous Professional Education' (CPE) is an overarching term for the means by which professionals (e.g. accountants) keep "up to date" with their skills.

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3. Legal principles

The following legislation is applicable to this policy:

- 3.1 The Skills Development Act, Act 97 of 1998;
- 3.2 Skills Development Levies Act, Act 9 of 1999;
- 3.3 The South African Qualifications Authority Act, Act 58 of 1995;
- 3.4 The Employment Equity Act, Act 55 of 1998;
- 3.5 The Broad Based Black Economic Empowerment Act, Act 53 of 2009; and
- 3.6 The National Skills Development Strategy 2005-2010.

4. Principles that apply to the policy.

- 4.1 An Employee must meet the following criteria in order to be considered for study assistance:
 - 4.1.1 The Employee has worked for Botle Buhle Brands for a minimum of twelve (12) months prior to submitting the study assistance application.
 - 4.1.2 The Employee must be in good standing with Botle Buhle Brands, i.e.:
 - a. The Employee has a consistent and reliable attendance record.
 - b. The Employee must not be in a period of resignation.
 - c. The Employee must not be under any disciplinary procedures which might result in the termination of employment.
 - d. The Employee is not in the process of being retrenched.
- 4.2 Conditions of approval of study assistance.
 - 4.2.1 The course of study, i.e. certificate/diploma/degree chosen by the Employee must be relevant or useful to the individual's work, job function, or future job function within Botle Buhle Brands.
 - 4.2.2 Courses should be presented by a recognised institution or training provider.
 - 4.2.3 Awarding of study assistance will be subject to budgetary constraints.
 - 4.2.4 Courses applied for must be of direct benefit to Botle Buhle Brands in terms of improving Employee productivity and enhancing the Employee's competencies in order to assist him/her to perform their job better.
 - 4.2.5 Managers will make recommendations as to the appropriateness of the course(s) and no unreasonable blocking of training approval will be allowed.

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- 4.3 Approval of study assistance may be revoked in serious cases of misconduct. In such cases, the Employee will receive the revocation in writing within a reasonable period of notice.
- 4.4 Employees may only apply for financial study assistance for new courses/qualifications, therefore, excluding any current qualifications for which they have already registered and/or started.
- 4.5 Each application for financial study assistance shall be assessed on its merit and due consideration shall be given to those employees who wish to study in work-related fields, and in some cases, where difficulty is being experienced in the recruitment of suitably qualified staff.
- 4.6 All courses/qualifications proposed are of a part-time nature, and do not require the Employee to forego their responsibility to the company in their current role i.e. The Employee cannot forfeit their work duties for a year to complete a full-time qualification.
- 4.7 Any Employee who wishes to obtain a qualification that is not a specific requirement of his/her current or future position in Bottle Buhle Brands will not be eligible for study assistance as outlined in this policy, however, may be eligible to apply for a study loan in terms of the company's Employee Loan Policy, subject to meeting the loan eligibility criteria, terms and conditions.
- 4.8 Where the Employee's study request is related to a future role within the business, it is the Head of the Department's responsibility to submit a motivational letter outlining the following:
- 4.8.1 There are foreseeable opportunities for growth within the department.
 - 4.8.2 The Employee is one of the top candidates for the projected career path, including an estimated timeframe in which the Employee may be promoted into another position.
 - 4.8.3 Why the Employee will benefit from the course/qualification proposed.
- 4.9 Meeting the eligibility requirements in this policy does not guarantee the approval of a study assistance application. The approval of any application for study assistance is subject to the Chief Executive Officer's discretion.
- 4.10 The Employee will be expected to repay the tuition fees paid under the following circumstances:
- 4.10.1 The Employee failed more than 35% of their course/qualification/academic year (if the course is longer than one (1) year).

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- a. In this case, the Employee will be required to pay back the tuition fees for that academic year, and will no longer receive financial assistance for the remainder of the course/qualification. In this case, the Employee is financially responsible for the continuation of the qualification until completion. Should the Employee decide to drop out, the remaining paid fees (i.e. study fees paid for a previous year) will need to be repaid to the company.
- 4.10.2 The Employee suspended his/her studies.
- 4.10.3 The Employee fails to complete the course/qualification.
- 4.10.4 The Employee leaves the company's employ, for whatever reason, whilst still completing the course/qualification.
- 4.10.5 The Employee has completed the course/qualification and failed to fulfil the work-back period. No pro-rated principle will apply to the amount owing by the Employee should they leave during their work-back period.
- 4.11 If an Employee is admitted to a supplementary examination as a result of academic performance, the Employee will be required to reimburse the company for the cost of that module.
- 4.12 In cases where the Employee fails up to two (2) modules, the Employee will be required to reimburse the company for the cost of those two (2) modules and reregister for those modules the following year at their own expense.
- 4.13 Should the Employee withdraw from or suspend their studies, the Employee will not be eligible for study assistance for a three (3) year period, starting from the date on which they withdrew from the programme.
- 4.14 The Employee is required to complete the course/qualification outside of working hours, excluding approved study leave for examination purposes. Where on-campus presence is mandatory, e.g. for the block weeks in an MBA programme, the Employee will be granted study leave, provided that the dates were communicated at least two (2) months in advance, or else unpaid/annual leave is taken.
- 4.15 The approved amount for study assistance will cover the following:
 - 4.15.1 Registration fees.
 - 4.15.2 Tuition fees.
 - 4.15.3 Examination fees.
- 4.16 Textbooks and other costs not mentioned above will be for the Employee's account.



- 4.17 All applications for study assistance will be reviewed and approved by the People Manager and Chief Executive Officer.
- 4.18 The Employee will sign an addendum to his/her employment contract once the study assistance application has been approved. This addendum will contain all the specifics regarding his/her study assistance and the respective work-back period applied.

5. Policy

5.1 Identifying training needs.

- 5.1.1 An Employee, his/her direct superior or Management can identify a training need.
- 5.1.2 If the Employee identified the training need, the Employee must discuss the identified training need with his/her direct superior (and Head of Department if their direct superior fulfils a different role), and motivate their interest in the course prior to any study applications being completed.
- 5.1.3 The Head of the Department will determine:
 - a. Whether the proposed training will elevate the Employee to an enhancing level of work performance and proficiency;
 - b. Whether the proposed training is in line with Bottle Buhle Brands business objectives; and
 - c. Whether internal (on-the-job training) or external training will be required to address the training need.
- 5.1.4 Where external training is required, the Employee is required to follow the application procedure set out in point 5.3 below.

5.2 Budget considerations.

- 5.2.1 The Chief Executive Officer will set the annual training budget through consideration of the following:
 - a. The financial situation of Bottle Buhle Brands;
 - b. Previous records of study fees;
 - c. Current staff education levels;
 - d. Required/desired staff education levels; and
 - e. Input received from the People Manager.
- 5.2.2 Bottle Buhle Brands will base its study assistance structure on the length of service of the Employee combined with the current earnings of the employee, serving as an

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indication of the relative worth the Employee provides to the Company. Therefore, a tiered approach to study assistance will be applied. A pro-rated work-back period will apply where the value of the course is less than 70% of the maximum value stipulated. Refer to Addendum A to identify which positions sit on the different occupational levels.

- a. The Employee has worked at Bottle Buhle Brands for less than eighteen (18) months.

Occupational level	Maximum value of course	Work-back period
Top Management	N/A	N/A
Senior Management	Up to R100 000	18 months
Middle Management / Professionally Qualified	Up to R50 000	12 months
Junior Management / Skilled Technical (C Upper Band)	Up to R 40 000	12 months
Junior Management / Skilled Technical (C Lower Band)	Up to R25 000	9 months
Semi-Skilled (B Band)	Up to R12 500	6 months
Unskilled (A Band)	Up to R 5 000	6 months

- b. The Employee has worked at Bottle Buhle Brands for more than eighteen (18) months but less than three (3) years.

Occupational level	Maximum value of course	Work-back period
Top Management	N/A	N/A
Senior Management	Up to R200 000	24 months
Middle Management / Professionally Qualified	Up to R 100 000	18 months
Junior Management / Skilled Technical (C Upper Band)	Up to R 75 000	12 months
Junior Management / Skilled Technical (C Lower Band)	Up to R50 000	12 months
Semi-Skilled (B Band)	Up to R25 000	9 months
Unskilled (A Band)	Up to R 10 000	6 months

- c. The Employee has worked at Bottle Buhle Brands for more than three (3) years.

Occupational level	Maximum value of course	Work-back period
Top Management	N/A	N/A
Senior Management	**To CEO's discretion	48 months

Middle Management / Professionally Qualified	Up to R 150 000	36 months
Junior Management / Skilled Technical (C Upper Band)	Up to R 100 000	24 months
Junior Management / Skilled Technical (C Lower Band)	Up to R75 000	18 months
Semi-Skilled (B Band)	Up to R35 000	9 months
Unskilled (A Band)	Up to R 20 000	9 months

5.2.3 Exceptions to the duration of service principle.

- a. In exceptional cases, the company may fund studies which are more expensive than the prescribed amount outlined in this policy, however, the minimum work-back period applied will be thirty-six (36) months. The implemented work-back period will be determined by Management, and on a case-by-case basis. The duration of the work-back period may be extended, at Management's discretion.
- b. Honours (or equivalent), Masters, MBA or PhD qualifications may be funded by the company regardless of the Employee's length of service, in the following instances:
 - a. The Employee is in a senior position in the company.
 - b. The Employee has been identified by Management as an invaluable asset to the company and would like to grow and retain the Employee.
 - c. The Employee has been identified by Management as a key employee for succession planning, and needs to equip the Employee with the required skills and knowledge to fulfil their future role.
- c. Where an Employee has completed an Honours (or equivalent), Masters, MBA or PhD qualification, the Employee's work-back period will be forty-eight (48) months.
- d. Approval of any study application that does not conform within the parameters of 5.2.2a, 5.2.2b, and 5.2.2c, is at the absolute discretion of the Chief Executive Officer.

5.2.4 The company will not take over any historical debt incurred by the employee for study purposes.

5.3 Application procedure.

5.3.1 A study assistance application form must be completed by the Employee and submitted to the Head of the Department for review and approval at least three (3) months before the registration deadline.

5.3.2 The following supporting documents should be submitted with the application:

- a. Proof of admission with training provider (if applicable);
- b. Copy of Matric certificate (if applicable and required for further studies);
- c. Copy of any other degree/diploma/certificate (if applicable and required for further studies).
- d. Contact time schedule.
- e. Estimated number of study days required.
- f. Course prospectus.
- g. Estimated course fees for each year of study.

5.3.3 Once the training request has been approved from a Departmental perspective, the Head of the Department must submit the completed form to the People Manager.

5.3.4 The People Manager will review the application and present appropriate applications to the Chief Executive Officer for consideration.

5.3.5 Dependent on the duration (longer than twelve (12) months) and/or cost (greater than R50 000) of the intended study programme, the Employee may be required to present a motivational presentation to a Training Panel before a final decision can be made.

5.3.6 The motivational presentation should outline the following, as a minimum:

- a. The Employee's need for the training.
- b. The perceived benefit(s) the qualification will bring to the company.
- c. The suitability of the intended programme for the employee's performance / advancement in the company.
- d. An overview of the course objectives and contact time structure.
- e. The estimated costs associated with the course.
- f. The estimated number of study leave days required by the Employee.

5.3.7 The panel for the presentation, as a minimum, will consist of:

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- a. People Manager.
- b. Chief Executive Officer.
- c. Departmental Head.
- d. Senior Financial Manager.
- e. Employee's direct superior (where the employee does not report directly to the Head of the Department).

5.3.8 A final decision on the study assistance application will be provided to the Employee within ten (10) working days from the date of presentation.

5.4 Records that must be kept:

The People Department must keep records of all internal and external training for claiming Bottle Buhle Brands Skills Development Levy back.

5.4.1 Internal Training Records:

The following documents must be in place and kept on record:

- 5.4.1.1 Attendance register needs to be completed with all of the following information:
- a. Full name of employee;
 - b. Date of training;
 - c. Type of training;
 - d. Topic covered in the training;
 - e. Facilitator's name;
 - f. Duration of training; and
 - g. Facilitator's signature.

5.4.2 External training:

The following documents must be kept on record:

- 5.4.2.1 Certificate of attendance/completion of the Employee; and
- 5.4.2.2 Proof of payment of course.
- 5.4.2.3 The Employee will be required to submit their semester/course results to the People Department within three (3) working days of receiving the results from the institution.

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6. Study leave.

- 6.1 Employees will be entitled to paid study leave subject to the following conditions:
- a. The study leave is in relation to an approved, company funded study assistance programme.
 - b. The Employee needs the study leave to sit an examination.
 - c. Employees may apply for study leave for the day before an examination for preparation purposes. However, study leave will not be granted on a Friday for an examination scheduled on the Monday following, nor will study leave be granted before a public holiday where the examination falls after the public holiday.
 - d. Study leave will not be granted for an Employee to complete an assignment, as all coursework must be completed in the Employee's personal time.
 - e. Study leave must be applied for at least four (4) weeks in advance. Where the Employee fails to provide sufficient notice of a scheduled examination, and the delay is not as a result of the institution's poor planning, the Employee will not be entitled to study leave to sit the examination and will be required to make use of annual leave (or unpaid leave where annual leave is not available).
 - f. The official examination timetable must be attached to the study leave application.

7. Related policies and procedures.

- 7.1 Employee Loans Policy.

8. Related documents

- 8.1 Study assistance application form.
- 8.2 Motivational presentation (where required).
- 8.3 Addendum to contract – work-back period.
- 8.4 Addendum A: Occupational Levels & Job Titles.

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