

**Name of Policy**

**POLICY ON STUDY SUPPORT FOR STAFF**

**Version No.4. (2023 review)**

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| <b>Policy Title</b>        | <b>POLICY ON STUDY SUPPORT FOR STAFF</b> |
| <b>Policy Officer</b>      | Human Resources Development Unit         |
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## 1. CONTEXT / BACKGROUND

- 1.1 The continuous development of members of staff is fundamental to ensuring that the University possesses a vibrant and active “learning culture” in order to achieve its own strategic objectives of offering the best possible teaching and research environment to its students.
- 1.2 It is the University’s policy, therefore, to grant study support to staff members to improve their qualifications, thereby boosting the profile of the University in relation to its competitors on both national and international levels.
- 1.3 The granting of study support is entirely at the discretion of the University and is subject to the applicable provisions of the South African Receiver of Revenue (SARS) legislative framework and regulations, as amended from time to time.

## 2. PURPOSE

The purpose of this Policy is to regulate the granting of **study support to staff members for the attainment of formal academic, technical and/or personal and professional qualifications.**

## 3. DEFINITIONS

For the purpose of this document, the following definitions apply:

|  |  |
|--|--|
| <b>Personal learning and development</b>     | <b>Personal learning and development</b> refers to competencies, skills, qualifications or education needed to better oneself or advance one’s career in the longer term. It is not an explicit requirement of a current post or a requirement of any other post. This may take the form of formal, or informal learning.  |
| <b>Professional learning and development</b> | <b>Professional development</b> is focused on improving the <b>knowledge and skills to improve the potential of employees in the work environment</b> . These are the skills that make employees more efficient and effective at their jobs and increase their expertise in the chosen field or discipline.<br><br>It includes formal types of vocational education or training that leads to a career related qualification. It can also include informal learning and development programmes, which may be delivered on the job to develop and enhance skills. |
| <b>Formal learning and development</b>       | <b>Credit-bearing qualifications, certificates, degrees, diplomas, registered on the National Qualifications Framework (NQF).</b> Typically, these are for a longer duration, and are formally assessed and certified.   |
| <b>Non-formal learning and development</b>   | <b>These are short courses or skills programmes that are offered either internally or externally.</b> Typically, these are for a shorter duration (less than 3 months). They tend to address specific skills or competencies and may or may not be assessed and certified. These development opportunities often assist in deepening competencies within the job role, or within the field/discipline.   |
| <b>Informal learning and development</b>     | This may include reading, personal research, gathering information, coaching, mentoring. Informal learning is typically used for position-related needs, and learning ‘on the run.’  |

|                                  |  |
|----------------------------------|--|
| <b>Contact hours</b>             | The time spent in formal learning such as attending lectures and laboratory sessions but excludes preparation time.  |
| <b>Eligible members of staff</b> | Full-time and part-time employees of the University as defined in the University's Conditions of Service, including honorary staff, <sup>1</sup> joint staff and grant-funded staff (unless otherwise determined by the grantor), but excluding staff from University entities, i.e. Wits Enterprise, Wits Health Consortium, and the Donald Gordon Medical Centre.  |
| <b>Full qualification</b>        | A planned combination of learning outcomes, which has a defined purpose or purposes, and which is intended to provide qualifying learners with applied competence and a basis for further learning.  |
| <b>Recognised qualification</b>  | Any University that is gazetted as being classified within the South African Public Higher Education sphere or a Private Higher Education institution registered with the Department of Higher Education and Training. For academic staff members, this provision will also include international universities, with whom the University has collaborative relations.  |
| <b>Study support</b>             | Financial support or concession granted by the University by way of remission of tuition fees for studies at this institution, or by way of part-subvention of tuition fees for study at another South African institution. Academic staff members may in accordance with clause 5.6 be eligible for financial support in terms of tuition fees at an international institution.   |
| <b>Tuition fees</b>              | Refers to the fees payable to an institution by a registered student, including fees for <b>registration, course notes, practicals, laboratory fees, and excursion costs</b> , but excludes extraneous fees and charges, such as those for copyright, residence, cancellations, exemptions, re-examination or special examination, supplementary/aegrotat examination, admissions to status and the issuance of certificates, charges for the use of equipment and materials, fees for the purchase of materials and deposits in respect of breakages. |
| <b>The University</b>            | shall mean the University of the Witwatersrand, Johannesburg.  |

#### 4. SCOPE OF APPLICATION

- 4.1 Short courses are excluded as these are managed on a different basis for purposes of addressing identified skills or performance gaps in support of the objectives of the University's performance management system.
- 4.2 The University may provide support for the completion of course(s) on an occasional basis under the following conditions:
- such course/s are prerequisites for a staff member to register for a higher qualification; or
  - staff members required to extend their academic background by completing a specific undergraduate course / courses on an occasional basis; or
  - it is an inherent requirement of a job, e.g. an academic staff member being required to register for an occasional course which is deemed necessary to teach a particular subject.
- 4.3 Where a staff member wishes to pursue an education-based qualification, or an accreditation to comply with vocational, sector-specific certification, specifically as a mandatory requirement to comply with the minimum requirements to undertake their duties i.e. electrical / mechanical or

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<sup>1</sup> Joint Staff are in most instances, non-University employees who enjoy some University benefits because of their contribution to academic activity. The rules for joint staff are stipulated in Annexure B.

plumbing trade test, wireman's license or equivalent, this must be motivated in full, and facilitated via accredited institutions.

- 4.4 Where a staff member works in a scarce skill area characterised by rapidly evolving technologies, ongoing certification is essential in order to ensure competency within the job role e.g. the ICT function. Within this arena, formal certification through accredited providers will be supported within the context of the scheme.

- 4.5 Professional qualifications or technical qualifications verified through recognition of prior learning (RPL) processes as equivalent of full qualifications on the National Qualifications Framework, are included in the scope of application of this policy. However, professional certification as required by professional bodies is excluded.

- 4.6 The University encourages staff members to pursue full qualifications at levels *higher* than their existing qualifications, except under the following circumstances:

- a) where staff members have already obtained a PhD and wish to expand or diversify their specialisations/discipline;
- b) where a staff member has completed an M Med but wishes to undertake a specialised qualification - in which case the M Med must be a pre-requisite. This positions the specialised qualification at a higher level than the full qualification already obtained;
- c) where a staff member wishes to pursue an education-based qualification to complement their discipline/subject field and enhance their teaching skills; and
- d) where staff members are supported by their direct manager in the pursuit of a professional/vocational, technical or artisanal qualification to complement their academic qualification.

## 5. PRINCIPLES

### Job relatedness

- 5.1 The policy supports study towards personal **and** professional qualifications (as per the definitions on page 3). However, given the incentives linked to **professional qualifications**, job-relatedness is essential. The line manager must evaluate relevance to the job or career trajectory of the staff member in accordance with the job description, and the agreed individual development plan (IDP) or conditions of service, at the time of application.
- 5.2 Unless otherwise provided for in this Policy, qualification awards as determined by the University's Remunerations and Reward Policy shall only apply to full qualifications, which had been pre-approved by the line manager **as per paragraph 5.1 of this policy**. This includes those professional qualifications or technical qualifications verified through recognition of prior learning (RPL) processes as equivalent of full qualifications on the National Qualifications Framework.
- 5.3 In its discretion, the University may from time to time provide study support to build capacity within specific functional areas to enhance operational efficiencies. In these situations, the SET member responsible for HR has the mandate to override this policy to create a sponsorship and funding arrangement best suited to the particular project.

### Support for full qualifications

- 5.4 The study support shall be for purposes of attaining formal, full qualifications registered with the South African Qualifications Authority (SAQA) and culminating in a minimum of 120 credits. The level of qualification is to be understood in accordance with the other rules outlined in this document.
- 5.5 In the interest of improving its staff academic profile, the University may provide study support to eligible staff to pursue **full qualifications** at a recognised South African university for remission towards tuition and registration fees only. In accordance with other rules within the scheme, this applies to personal and professional, formal, development.
- 5.6 **Tuition and registration fees shall**, subject to South African Receiver of Revenue (SARS) regulations and/or concessions, **be paid in advance on behalf of staff members** in accordance with the prescribed rules, applicable percentage allocation and caps that the

- University may determine from time to time in the best interests of financial sustainability.
- 5.7 In the event that a full qualification is available only at a recognised international university, a full motivation must be submitted and the costs for study support will be awarded at the rate applicable to the most expensive qualification available at the University. International study support applies only to academic staff members.
- 5.8 The University may consider providing study support to a staff member for studies either at another South African or at an international University as appropriate, based on the following criteria:
- a) the specific full qualification in question is not offered at the University, and it is an important qualification to pursue in terms of a staff member's particular subject discipline, or in terms of a particular faculty or school's strategic objectives (i.e. capacity building);
  - b) the required specialist supervision required for the full qualification is not available at the University and, therefore, has to be sought externally at another university;
  - c) the required specialised resources for the particular field/discipline or full qualification are not available at the University;
  - d) where conditions a, b and c are met, but the envisaged full qualification is only available at an international institution, the bursary will be awarded at the rate applicable to the most expensive full qualification available at the University, and calculated at 67% of the University fee;
  - e) Where a staff member is already registered for a full qualification through an outside university at the time of being employed by the University, study support will be continued for the completion of that qualification, as per the applicable rules.
  - f) Evidence related to these criteria must be provided, for example, a letter from the school which houses the applicant, and/or a letter from the particular internal faculty confirming a lack of supervisory and/or unavailability of specialised resources, e.g. specialised laboratory equipment, telescopes, etc.
- 5.9 In the event that staff members have not previously received study support from the University for their post-graduate qualifications, they may be eligible for study support for job-relevant, post-graduate qualifications at an equivalent or lower level than they have already achieved.
- 5.10 The University recognises that in some work areas, studying towards a full qualification internally may present a conflict of interest within the staff role, e.g. in the examinations and graduation office. Under these unique circumstances, staff members will be considered for study support at accredited higher education institutions in South Africa at 100% of the benchmarked tuition fee, subject to taxation regulations being applied.

### **Support for Professional or Technical Qualifications verified as equivalent of full qualifications on the NQF**

- 5.11 The University will support professional or technical qualifications verified as equivalent of full qualifications on the NQF, where such a qualification is an inherent requirement for the job as per statutory requirements for competence, e.g. Finance Certification, ICT, Artisanship, etc.
- 5.12 Such support may include fees payable for trade testing requirements, subject to the provisions of duration and study support suspensions under this policy, and tuition fee exclusions.

### **Managing multiple sources of funding**

- 5.13 In the event that an employee is awarded a scholarship by the University or an outside funding source, the employee may not capitalize on both sources of funding and the staff bursary for the purposes of cash payment of excess funds. This is regarded as "double dipping."
- 5.14 Instead, the employee needs to select whichever of the two study support options provides the greater monetary benefit, so that this may be paid into their student account. Thereafter,

if there is still a balance outstanding, the employee may use the secondary study support option purely to settle the balance on the student account, **or defray any other costs towards the study, as defined within this policy, and which the first study support option excludes.**

- 5.15 Failure to declare other funding will disqualify the staff member from any fee remission going forward and the fee remission already granted will need to be refunded by the staff member to the University.

### **Duration of study support**

- 5.16 The University provides study support on the basis that the staff member achieves successful progression within a particular qualification on an annual basis. Should a staff member not meet the minimum requirements in a particular year of study, the study support may be suspended until such time as an academic year has once again been successfully completed at the staff member's own costs.
- 5.17 Study support shall be granted on a timeframe of n+1 for a specific study trajectory, provided that successful completion of each academic year is achieved; "n" being the maximum time required to complete a full qualification, and 1 being an additional allowable year of support. Should the study trajectory not be completed, or the study stream is changed, this will have implications for the value of n+1.
- 5.18 Notwithstanding the principles stipulated in paragraph 5.6, the University recognises that staff work full-time and may pursue their qualifications on a part-time basis. Therefore, a principle of n(p) shall apply, i.e. 'n' based on the stipulated duration of part-time study as opposed to n(f), on which 'n' is based on full-time study as stipulated in the recognised university's institutional/faculty rule book in respect of that particular qualification.
- 5.19 In instances where a full qualification is interrupted by maternity leave or adoption leave, the timelines for the provision of bursary support may be extended by an equivalent amount of time spent on such leave. This is to ensure that the staff member is not "penalised" in the sense that the bursary n+1 time period is used up during the maternity or adoption leave period.

### **Termination of services or suspension of study support**

- 5.20 The University provides study support towards the successful academic progression year-on-year within a particular qualification. In the event that a staff member does not meet the minimum pass requirements in a particular year of study, study support may be suspended until such time as an academic year has been successfully completed at the staff member's costs.
- 5.21 In the event that a staff member's services or studies are terminated before the obligations of a service undertaking are fully met, the study support shall be forfeited, and s/he is liable to repay the costs, pro-rata reduced by period served in lieu of their obligation, save in situations where a settlement agreement specifies the contrary.
- 5.22 For studies at the University, cancellation fees in respect of discontinuation of studies will be calculated in accordance with the relevant stipulations in the Faculty Rules Booklet for each year and shall be for the staff member's own account.
- 5.23 It is incumbent on the staff member to provide progress reports to both the line manager and the relevant HR Office, for administrative purposes. Staff members whose services are terminated by the University or on a voluntary basis, before completing their studies or concluding their contractual obligations shall take personal responsibilities for their studies and refund the University for support provided, *pro rata* reduced by period in service.
- 5.24 Staff members whose services are terminated for operational reasons may be considered for study support in accordance with the social plan agreed between the University and unions operating in the workplace or as part of the retrenchment packages.
- 5.25 In exceptional cases, and where a staff member retires (early or mandatory) before completing a full qualification, study support may be continued for such a staff member to enable him or her to complete the full qualification, without any contractual obligation for service and in accordance with paragraph 5.13 of this policy.



## **Attendance of lectures**

- 5.26 The granting of study support by the University does not automatically entitle staff to use working hours for study purposes. Staff members may, with the permission of their Head of Department, be permitted to attend lectures for up to 5 contact hours during the working week in accordance with the Leave Policy of the University.

## **6. ROLES AND RESPONSIBILITIES**

- 6.1 Roles and responsibilities pertaining to this Policy shall be executed as per Clause 7.1. and 8.2. hereof.
- 6.2 The Human Resources Committee (HRC) of the University shall exercise oversight on all issues pertaining to this policy, assisted by the Senior Director: Human Resources.
- 6.3 Line managers, assisted by Human Resources Managers, shall be responsible for approving applications for study support in their respective areas of responsibility. In exercising this responsibility, job-relatedness of proposed qualifications must be considered before approvals could be granted.
- 6.4 In the event of any disputes or appeals arising out of the administration of this policy, the Appeals Committee, comprised of the Senior Director: HR, the Registrar, the Head: HRDU, and the relevant HR Manager/Officer, will seek operational resolutions. Where appeal cases, data analytics, and the changing socio-economic landscape point to the need to fundamentally reconfigure aspects of this policy, the HRC sub-committee will provide strategic input.
- 6.5 The sub-committee, chaired by the Deputy Vice-Chancellor: People Development and Culture, shall provide regular reports on the disputes and appeals handled to meetings of the HRC.

## **7. ADMINISTRATIVE PROCEDURES**

The following administrative procedures shall apply for purposes of implementing this policy:

### **7.1 Applications**

- 7.1.1. Eligible staff shall submit applications via the Wits Online Bursary Application system, attaching both proof of admission to a full qualification and a statement of fees from a recognised university. This application for study support should be made via the online system and its associated workflow **on an annual basis, and at the beginning of an academic year**, or as soon as possible once registration has taken place at a recognised university or accredited institution in the year studies are undertaken.
- 7.1.2. In the event of the continuation of studies, applications must be accompanied by the examination results for the previous year of study, including an online statement of results obtained from the website of the registering institution, referring to the student number.
- 7.1.3. The relevant human resources office shall process the applications using the following considerations:
- a) for professional and administrative staff at the University who are encouraged to achieve their first qualifications, the job-relatedness criteria will be waived on an understanding that a first qualification is essential as a means of opening access to postgraduate study and increased specialisation. This supports the spirit of both personal and professional development.
  - b) Given the high-cost tier of qualifications **related to management development**, support is granted on the basis of a maximum cost threshold **as determined by the Senior Executive Team, from time to time (see Annexure A for details)**.
- 7.1.4. In terms of online workflow, applications for internal studies at the University will be channelled



via the relevant human resources office, through to the Fees Office. Applications for studies at another recognised university or institution (external) will be channelled via the relevant human resources office to the Human Resource Development Unit (HRDU) and then to the Finance Department for payment.

- 7.1.5. The online application system provides a clear indication of progress and indicates where each application is sitting as it moves through the workflow. The relevant human resources office is also able to provide feedback to staff to support and enable a timeous registration process.

## **8. QUANTUM DETERMINATION**

- 8.1.1. Except in cases of PhD studies, which are a condition of the job and for continued employment at the University, full-time and part-time continuous employees are eligible for bursary support as per the % allocations outlined in **Appendix A**.
- 8.1.2. Full-time fixed-period contract staff are eligible for study support as per the % allocations outlined in **Appendix A**. These staff members would serve their contractual obligation on a concurrent basis to their period in service.
- 8.1.3. Part-time, fixed period contract staff are eligible for study support as per their percentage appointment as specified in contracts of employment to the value indicated in **Appendix A**.
- 8.1.4. Staff in grant-funded positions will be treated as Council-paid staff members and will be eligible for study support according to the same rules for Council-paid staff. However, in the event that the grantor has specifically allocated costs for formal development, as part of the grant funding allocation, participation on study support will be excluded.
- 8.1.5. The formula to calculate remission of fees for honorary staff and lecturers/ instructors participating in the teaching of the University students, but who are not University employees, is as follows:  
Percentage remission of fees = annual number of contact hours teaching equal to or more than 100 (n), divided by 500\*, multiplied by 100 (to a maximum of 100%)  
$$= \frac{n}{500} \times 100$$
  
\*500 hours is the estimate of the time a full-time lecturer would offer. Therefore, honorary staff members or lecturers / instructors participating in the teaching of Wits' students, but who are not University employees, teaching 500 hours or more p.a. will receive the full remission. Note: Refer to **Appendix A**.

### **Contract administration**

- 8.1.6. Staff receiving support as envisaged in this policy shall sign a funding agreement with the University on the basis of one year for every year sponsored (served concurrently). This provision is not applicable to staff members who are receiving study support as part of the social plan or those who retire before completing their studies.

## **9. THE PROTECTION OF PERSONAL INFORMATION ACT, 4 OF 2013**

- 9.1 In order to give effect to this Policy and to the relevant employment contracts, the University may be required to process personal information and/or special personal information from time to time; this being in pursuance of the University's legitimate interests.
- 9.2 Any personal information obtained for purposes of this Policy will be processed in accordance with the requirements of the Protection of Personal Information Act, 4 of 2013.

## **10. POLICY REVIEW**

The policy shall be reviewed bi-annually, based on changes in the operational conditions of the University, applicable legislation, and/or changes in the broader socio-economic environment.

## VERSION HISTORY

| Version | Date           | Summary  | Changed by |
|---------|----------------|--|------------|
| 4       | 31 August 2023 | <p>The Policy for Study Support for Staff is amended to:</p> <ul style="list-style-type: none"><li>• Clarify additional definitions;</li><li>• Refine the principles;</li><li>• Update administrative procedures, and;</li><li>• Reconsider the maximum cost threshold for external studies given escalating fees in Higher Education.</li></ul> |            |
|         |                |  |            |

## APPENDIX A: Categories of Staff & Bursary Rates

| CATEGORY OF STAFF   | Own Studies at Wits  | Own Studies at Other Universities  |
|---|--|--|
| Full-time continuous staff  | <p>100%</p> <p><i>*Exceptions for studies at WBS</i></p>   | <p>67%<br/>(Academic Staff)</p> <p>75%<br/>(Professional and Admin Staff)</p> <p><b><i>*Against a threshold of R60 000 annual cost</i></b></p>                               |
| Part-time continuous staff  | <p>According to % time on contract</p> <p><i>*Exceptions for studies at WBS</i></p>  | <p>67% of contract %<br/>(Academic Staff)</p> <p>75% of contract %<br/>(Professional &amp; Admin Staff)</p> <p><b><i>*Against a threshold of R60 000 annual cost</i></b></p> |
| Full-time fixed period staff (contract)   | <p><b><i>NOTE: Time worked in at least 12 months or more before eligible for study support</i></b></p> <p>100%</p> <p><i>*Not eligible for studies at WBS</i></p>                            | Not applicable   |
| Part-time, fixed period staff (contract)  | <p><b><i>NOTE: Time worked in at least 12 months or more before eligible for study support</i></b></p> <p>According to % time on contract</p> <p><i>*Not eligible for studies at WBS</i></p> | Not applicable   |
| <p><b>IMPORTANT NOTICE</b></p> <p><b>*Bursary support for management studies at WBS are facilitated as follows:</b></p> <p><b>MBA, MM, and PGDip in Business Administration or PGDip in Management:</b><br/> <b>A flat remission rate of R60 000 per year</b> provided that specific criteria are met e.g. grade, strategic objectives, succession planning, transformation targets etc. The application must be accompanied by relevant supporting documentation in this regard.</p> |  |  |

## APPENDIX B: Health Sciences - Categories of Staff & Bursary Rates

Given the unique nature of the Faculty of Health Sciences – particularly, the staffing category of Joint Staff – we have outlined more detailed bursary rules for this area in a separate table.

| CATEGORY OF STAFF   | DESCRIPTION   | BURSARY ALLOCATION for study within Wits  |
|---|---|---|
| Professors and Non-Professorial academic Heads of Divisions/Departments | As per the current guideline  | 100%  |
| Registrars  | <p>All students registered for the “Master of Medicine” qualification, whose studies are on a full-time while in a clinical training position with the respective entity (e.g. Gauteng Health, NHLS, etc.).</p> <p>The minimum registrar study time is 4 years, consisting of Part 1 and Part 2; Part 2 includes the research report. For surgical disciplines it consists of Part 1A, Part1B and Part 2 (the research reports constitute a part of Part 2) done in a minimum period of 5 years.</p> <ul style="list-style-type: none"> <li>Non-Surgical bursary support for 3+1 years.</li> <li>Surgical disciplines bursary support for 4+1 years.</li> </ul> | <ul style="list-style-type: none"> <li>80% (1<sup>st</sup> registration in 2020 and for the duration of the qualification)</li> <li>70% (1<sup>st</sup> registration in 2021 and for the duration of the qualification)</li> <li>60% (1<sup>st</sup> registration in 2022 and for the duration of the qualification)</li> </ul> |
| Principal Specialists/Chief Specialists                                 | As per current guideline  | 80%   |
| Consultants   | Students who have completed M Med speciality, doing Sub-Specialty M Med for 2+1 years, e.g. Master of Medicine in Paediatrics in the subspecialty of Paediatric Cardiology.   | 67%   |
| Fellows   | These are Registrars that have completed their M Med Part 1 and Part 2 exams, undertaking either the research report or sub-specialty training  | 67%   |
| Specialists/Senior Specialists  | As per the current guideline  | 67%   |
| Medical Officers  | Joint appointees who participate in the teaching of Wits Students but who are not University Employees”   | 55%   |
| Supernumerary Registrars  | International registrars doing M Med who are here on a study permit. Studies are on a full-time basis while in a clinical training position with the respective entity (e.g. Gauteng Health, NHLS, etc) This is the <u>same as a Registrar but with no remuneration</u> , teaching, and not funded by their government. NOTE: A letter is required from the respective government as proof that no funding is provided.   | 55%   |

| <b>CATEGORY<br/>OF STAFF</b> | <b>DESCRIPTION</b>  | <b>BURSARY<br/>ALLOCATION for<br/>study within Wits</b> |
|------------------------------|---|---|
| <b>Honorary Staff</b>        | Individuals participating in the teaching of Wits Students but who are not University Employees | <b>55%</b>  |
| <b>Sessional Staff</b>       | Not applicable  | <b>Not Applicable</b>                                   |
| <b>Interns</b>               | Not applicable  | <b>Not Applicable</b>                                   |
| <b>Visiting staff</b>        | Not applicable  | <b>Not Applicable</b>                                   |