



# **BURSARY POLICY FOR MUNICIPAL EMPLOYEES**

**2023/24**

## **1. PREAMBLE**

The pursuit of further education and training is important as it exposes employees to new developments in their professional careers, help them grow and perform their work better. Basically it broadens their knowledge base and helps them derive new ways of doing things. This ensures continued supply of learned human resources that will enhance and sustain service delivery by Maruleng Local Municipality. In the interest of improving the skills of the employees, it is of utmost importance that resources are allocated to support and encourage this initiative that is geared at developing the human resources to sustain present and future survival of the Municipality.

## **2. POLICY OBJECTIVES**

The objectives of this policy are:

- to create a learning organisation where further learning is encouraged;
- to encourage and support employees who intend pursuing formal learning at accredited tertiary institutions in order to obtain qualifications in areas which are in line with Maruleng Local Municipality's core functions;
- To support and address the Employment Equity (EE) and Affirmative Action(AA) initiatives of the Municipality as spelled out in the Employment Equity Plan.

## **3. BUDGET**

The Human Resource Development division shall budget each year for financial assistance to be granted to selected employees during an academic year. This shall be based on projected increase in academic fees, Maruleng Local Municipality's human resources plan knowledge / skills requirements. The budgeted amount shall be allocated as follows:

- 85% shall be allocated to designated groups in terms of the Employment Equity Act;
- 15% shall be allocated to previously advantaged employees;

The ratios shall be reviewed annually by the Bursary committee and be approved by the Municipal Manager

## **4. CONDITIONS FOR FINANCIAL ASSISTANCE**

The conditions stipulated hereunder will apply with regard to awarding of bursaries to applicants depending on the availability of funds:-

- All employees irrespective of gender, race, culture, tribe, age, creed, educational level, seniority, disability or status can apply for financial assistance;
- The Municipality may at any time suspend the financial assistance to the employee in its sole discretion if the employee is not making satisfactory academic progress. An employee shall be deemed to be making satisfactory academic progress if (s) he has passed more than 50% of the course(s)/subject(s) registered for in an academic year;
- The bursar shall repeat failed course(s)/subject (s) at own cost failure to repeat the course (s)/subject(s) failed during the previous year, the bursar shall have to repay the Municipality the amount paid for the course (s) subject(s).
- In the event that the bursar fails s/he shall refund the Municipality funds paid for those courses. Should the employee repeat the failed courses successfully then on production of receipt of payment & statement of results s/he shall be refunded by Maruleng Local Municipality.

***NB: Any further financial assistance can be applied for on passing failed course(s)/ subjects and forwarding proof thereof to the Bursary Officer.***

- A bursary shall be awarded to an employee who pursue studies which are in line with the current post held or career path;
  - Permission to pursue studies on a full-time basis shall be agreed to by Council and approved by the Municipal Manager as per Clause 7.1.1. Special Leave Policy;
  - A bursar is restricted to register for a maximum of 4 courses/ subjects per academic year. Permission to register for more than 3 courses/ subjects shall be granted and approved by the Bursary Committee. Therefore employees registering for a 3 year diploma or degree shall be expected to complete their studies in 5 years;
  - In the event the bursar leaves the employ of the Municipality for any other reason other than retrenchment, redundancy or retirement before the expiry of the said duration, the bursary shall become immediately repayable in full or pro-rata depending on the time outstanding:
- N.B: In case of death or the bursar being incapacitated by any mental or physical disability, any liability for the refund of any moneys that may be owed to the Municipality the Bursary Officer shall communicate this to the Municipal Manager to obtain authority to write off the debt.

## 5. NATURE AND EXTENT OF FINANCIAL ASSISTANCE

No	Expense description	Category of students entitled	Amount
1.	Registration fee	All	No limit
2.	Tuition fee	All	No limit
3.	Examination fee	All	No limit

## 6. COMPOSITION OF THE BURSARY COMMITTEE

The bursary committee shall be made up as follows:

- Corporate Services Director
- CFO
- Human Resources Manager
- UNION Representatives (02)
- Head of Admin Portfolio
- SDF (also serve as secretariat)

## 7. RECRUITMENT AND SELECTION

### 7.1. Advertisements

A circular inviting applications for financial assistance shall be issued on the first working day of July each year via the Bursary Officer to ensure that:

- All regional employees are afforded an equal opportunity to apply:
- To allow timeous application at relevant institutions.

7.2. Application made on the prescribed Bursary Application Form and completed in full with Line Management's recommendation should be forwarded to the Bursary Officer.

NB: The Line Management recommendations must include confirmation that:

- the studies to be pursued by the applicant forms part of his/her Personal Development Plan (PDP)
- will provide the applicant with critical skills required in his current post
- The studies are in line with the applicant's anticipated career path.

The applications should reach the office of the SDF by not later than the 31<sup>st</sup> August each year. The Bursary Committee shall within a month after the closing date scrutinize and select applicants who qualify for financial assistance. The Memorandum with details of the applicants recommended to be granted

financial assistance shall be forwarded to the Municipal Manager for final approval.

ADDENDUM 1: A copy of the Bursary Application Form.

**NB:** *Due to budgetary constraints, first preference in granting Financial Assistance will be given to employees pursuing studies that will fulfil the skills gap as informed by the Workplace skills plan (WSP) and the Employment Equity (EE) and Affirmative Action (AA) initiatives in the Municipality.*

## **8. ADMINISTRATION PROCESS**

The Bursary Officer shall ensure that:

- all applicants are informed of the outcomes of their applications on or before the 31<sup>st</sup> October every year.
- all successful applicants must sign the Contractual Binding Forms for Training Assistance : Serving Employees.
- Payments of registration and tuition fees are done directly to the relevant educational institutions upon receipt of proof of registration.

ADDENDUM 2: A copy of Contractual Binding forms for Training Assistance: Serving Employee.

## **9. CONTRACTUAL OBLIGATIONS**

The following contractual obligations shall apply to employee (s) studying on full-time basis:

- The employee who pursue studies full-time on an external bursary or scholarship with post-study obligations, such an employee shall have to terminate his/ her employment with the Municipality.
- Where the employee pursue full-time studies on an external bursary or scholarship with no post-study obligations, the following conditions shall apply:
  - The employee shall have the option of terminating his/her employment with the Municipality:
  - the employee can take unpaid leave or can apply for study leave if (s) he has sufficient leave days to cover the duration of his/her studies. Permission shall be granted subject to the Municipal Manager 's approval. Upon completion of the studies, the employee shall be placed in a position anywhere in the Municipality that is not lower in rank than the one held prior to pursuing the studies.

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- in case of an employee having received a bursary from the Municipality to study full-time, (s) he shall redeem the bursary by serving the Municipality for a period equal to that for which the bursary was granted:
- in case of an employee who studies or undergoes training in short periods, e.g. three or six months, (s) he shall enter into a contract with the Municipality in terms of which (s) he shall serve the Municipality for a commensurable period:

#### **10. BURSARY CANCELLATION**

If the bursar is excluded or expelled from the institution or discontinues his /her studies on his/her own accord, the bursary shall be cancelled forthwith and the bursar shall have to repay the Municipality at an interest rate applicable from time to time to debts due to the state as determined by the Minister of Finance in terms of section (80)1(b) of the Public Finance Management Act. The amount owed shall be deducted from his /her salary on an instalment basis over a period to be agreed to by the Municipal Manager. The SDF shall facilitate this. The employee authorising the Municipality to effect such deductions must complete an Acknowledgement of Debt Form. This shall be effected a month following cancellation.

#### **11. ACHIEVEMENT BONUS**

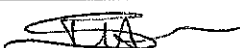
An achievement bonus shall be granted to employees on successful completion of degree or a degree or national diploma at a University or Technikon on part-time basis. Three certified copies of academic transcripts should be forwarded to the Bursary Officer for filling and for applying on behalf of the employee for the awarding of an achievement bonus.

The achievement bonus shall be awarded in of terms of the applicable Personal Administration standards.

#### **12. COMMUNICATION**

The Bursar must keep the SDF informed of his /her academic progress, examination results and of change of status, e.g. cancellation, discontinued studies, resignation, transfer, etc. In case the bursar intends to change study direction or the learning institution, he/ she must communicate his /her intentions in writing to the SDF. The SDF can only effect such a change on approval by the Municipal Manager.

The terms of this policy shall effect on the date of approval by the council.

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<b>Compiled by</b>	<b>Human Resources</b>
<b>Date Approved</b>	<b>29/05/2023</b>
<b>Effective Date</b>	<b>01/07/2023</b>
<b>Signature</b>	

**ADDENDUM 1**

<p style="text-align: center;"><b>MARULENG LOCAL MUNICIPALITY</b></p> <p style="text-align: center;"><b>BURSARY APPLICATION FORM</b></p>
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**PERSONAL DETAILS**

Name: \_\_\_\_\_ Empl No: \_\_\_\_\_

Gender: Male ( ) Female ( ) Disabled: Yes ( ) No ( )

Job Title/ Rank: \_\_\_\_\_ SBU/Region \_\_\_\_\_

Division: \_\_\_\_\_ Telephone No: \_\_\_\_\_

Highest Qualification: \_\_\_\_\_ ID No: \_\_\_\_\_

**NB: PLEASE ATTACH COPIES OF QUALIFICATIONS OR LATEST ACADEMIC RESULTS**

**STUDY DIRECTION**

Intended field of study to be pursued: \_\_\_\_\_

Name of Institution: \_\_\_\_\_

Academic year of study (e.g. 1<sup>st</sup>, 2<sup>nd</sup> or 3<sup>rd</sup> year): \_\_\_\_\_

**FINANCIAL ASSISTANCE BREAKDOWN**

Expense description	Amount
Registration fee	R
Tuition fee	R
Examination fee	R
<b>TOTAL</b>	<b>R</b>

**LINE MANAGEMENT APPROVAL**

Name	Persal No.	Job Title	SBU/Region

Line Management recommendations:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**CONTRACTUAL BINDING**

**TRAINING ASSISTANCE:      SERVICING EMPLOYEES**

**UNDERTAKING**

- (a) Whereas I, the undersigned,.....(full name) hereinafter called "**the Employee**", born.....19.....an employee in the service of the State in the..... (Name of Municipality/ administration; hereinafter called "**the Municipality**", am accepting a bursary/an assignment of the Municipality to undertake on a full-time/ part-time basis..... (Name of course/ study) hereinafter called "**the Course/ Assignment**", which extends over a prescribed minimum period/ prescribed minimum remaining period of.....year(s).....months, and
- (b) Whereas I must for the aforementioned purpose attend classes in official hours of duty and/or undertake study/ research, as the case may be, at an approved training institution locally or abroad as stipulated in writing by the Municipality and directed by its needs from time to time and;
- (c) Whereas the Municipality will allow/assign me to attend such classes in official hours of duty for the prescribed minimum duration/ prescribed minimum remaining duration of the Course/ Assignment.

2. Therefore I undertake-

- (a) to commence the Course/ Assignment effect from..... to take the Course/Assignment full-time/part-time while I am in the service of the Municipality and to complete the Course/ Assignment successfully within the aforementioned period or within such extended period as may be approved in terms of clause 3 (d) (ii).
- (b) to furnish the Municipality with satisfactory proof of enrolment for the Course/ Assignment at the commencement of each year of each year of study;
- (c) if study full-time, to report for and resume my normal duties in the Municipality at the centre specified by the Municipality from time to time, during the vacations when I am released from attendance at lectures and/ or practical/ theoretical training may be granted to me in respect of such periods;



unless leave of absence is granted to me in respect of such period(s);

- (d) to undergo such practical training as may be prescribed by the aforementioned training institution as part of the Course/ Assignment or as may be required for purposes of registration in my particular profession, in the Municipality so desires;
- (e) to inform the Municipality on a regular basis of my progress, and to furnish the Municipality with official proof of my examination results immediately after the results of any annual/ bi-annual examinations/ supplementary examinations have been made known by the examining authority;
- (f) If study full-time, and after I have complied with all requirements of the Course/ Assignment, to immediately continue to serve the Municipality or such Municipality to which I may be transferred, in any capacity for which the Municipality concerned may consider me suitable, for a continuous period.