



BURSARY POLICY

Date Approved	Version	Resolution No
	3	

DRAFT

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1. Preamble

The Municipality is committed to the structured and systematic training and development of all its employees on an on-going basis to facilitate the acquisition of knowledge, skills and other competencies in order to realise employees' potential as well as assist the municipality meet the stated organisational objectives and fulfil its mandate.

2. Objectives

The objectives of this policy/directive are the following:

- 2.1 To set out an integrated framework for employee assistance for training and development purposes.
- 2.2 To enable employees to acquire formal qualifications and fulfil latent potential.
- 2.3 To create a culture of learning and build capacity within the municipality.
- 2.4 To meet equity objectives
- 2.5 To ensure staff retention and attraction within the Municipality

3. Principles

- 3.1A training and development committee will be established as per the terms of reference and provide a framework and direction for the provision of training, and provide guidelines to prioritise the allocation of resources for training and development purposes inclusive of the provisions of bursaries to eligible staff within the Municipality.
- 3.2 The Training and Development Committee shall make recommendations to the Council on which training and development interventions should be funded.
- 3.3 The allocation and/or approval of bursaries will be subject to availability of budgeted funds. The Municipality undertakes to budget for training and development.
- 3.4 Bursaries shall only be granted to employees who have completed their probation period with the Municipality.
- 3.5 Training of Councillors will be implemented in line with the Upper Limits on the Remuneration of Councillors and the Municipal Work Skills Programme (WSP).

4. BURSARY PROCEDURE

- 4.1 The granting and taking over of bursaries must have direct relevance to the functions performed within the unit of the municipality or the skills to be acquired as a result of the study programme must hold some benefit to the Municipality.

4.2. A motivation regarding the merits of granting a specific application must be provided by the Director to the Training Committee who will make a recommendation to the Director Corporate Services for final approval.

The following provisions will be applicable and will form part of the motivation:

- The Municipality will prioritise new applications for qualifications that are prescribed as essential requirements in the approved job description of the applicant and reflected in its approved Works Skills Plan (WSP). In such instances, the Municipality will be responsible for the tuition fees, accommodation and subsistence allowance for the aforesaid qualifications. Staff members whose studies are funded by the Municipality in this manner will however not benefit from the Qualifications Recognition Policy.
- The Municipality may consider bursaries applications where an employee furthers his/her studies over and above the minimum requirements for the position that he/ she currently occupies. In order to qualify, employees must enrol for qualifications that are in line with the municipal core functions and these qualifications must be completed within an area related to the incumbent's key performance areas. The Municipality will however only be responsible for tuition fees and this will be subject to availability of funds.
- All bursary applications must be accompanied by an acceptance letter.
- All bursary applications must be submitted to the Corporate Services Directorate by the 30 November in the year preceding the implementation of the course/programme.
- Preference be given those applicants that were provided with bursaries in the previous year for continuation (only if it is a continuation of the same funded qualification)
- Applicants are required to submit all specifics regarding both the institution and the course content; (specific documentation required);
- The Municipality will only fund programmes that are offered by institutions accredited by the Council for Higher Education and all applications must include confirmation of the accreditation status of that particular institution;
- In cases where funding is required for a programme that is not an essential requirement of the post, the applicant must provide an indication of how this particular course would assist the applicant within his/her present line of functioning within Senqu Local Municipality;
- Approval shall only be for one year at a time pending passing of the course by the bursary beneficiary.
- Only one bursary will be granted during an employee 's tenure at the Municipality.
- The Municipality will only fund studies that will help an employee to obtain the minimum requirements of their jobs and will thus be limited to a Bachelor 's degree or equivalent. The Municipality will only approve bursaries for postgraduate studies when it is a requirement of the job that the incumbent should hold a post graduate qualification.

4.3. Upon a recommendation by the relevant Departmental Director to the Training Committee pending the availability of funds, the applicant would be duly advised and requested to submit all required documentation for registration purposes.

4.4 Employees who are granted bursaries, or whose bursaries have been taken over by the municipality, shall enter into an agreement with the Municipality under the following conditions;

- a) The municipality undertakes to pay reasonable costs of registration and tuition fees directly to the institution.

- b) The applicant shall undertake to pursue his/her studies with diligence and complete the approved tuition intervention with the prescribed study period or such period as the Council may approve.
- c) The applicant undertakes to submitting, at the end of each academic year, semester or whatever period deemed to be an academic cycle, a report from the educational institution on his/her performance and achievement to the Training and Development Committee.
- d) The applicant undertakes to serve the Municipality and be contractually bound to the Municipality for a period equivalent to the period for which a bursary has been granted to the employee.
- e) Failure to complete the required "work back period, will result in the employee being liable for the repayment of the full amount of the bursary granted to such an employee by the municipality.
- f) Applicant doing the Certificate Programme in Municipal Financial Management Development (CPMD) programme will be contractually bound to work for the Municipality for a period equal to double the period for which the financial assistance has been granted to the employee, after completion of the CPMD Programme. Failure to work back the required period will result in repayment on a pro rata basis for the financial study assistance as well as any monies paid by the Municipality for Travelling and accommodation.
- g) In the event of Ill health or death of the employee, the Municipality will be liable for all training related costs.

4.5. All repeat or substitute subjects are for the employee's own costs.

4.6 Both permanent and fixed-term contract employees are eligible to be granted bursaries and to be assisted for the purpose of improving their skills in terms of the provisions of this policy.

4.7 Both the applicant and Municipal Manager are required to sign acceptance of the Bursary Agreement.

5. Cancellations

5.1 If the bursar is expelled from the institution, discontinues on the employee's own accord or failed to complete the studies, the bursary will be cancelled and all disbursement in terms of the bursary shall be regarded as an interest free loan and shall be repaid to the Municipality at a rate agreed upon.

5.2 A bursary granted to the employee will be withdrawn / cancelled and the employee is obliged to pay back the bursary, if;

- The employee is failing to submit results as provided in this policy.
- The employee fails to complete the studies within the prescribed study period.
- There is failure to make reasonable/acceptable progress.
- If the employee resigns from the Municipality.

6. Forms of Financial Assistance

- Bursaries for Part-time studies at registered and recognised institution – national Diploma and Degree/Qualification Etc.

- Bursaries for Full-time Studies at registered and recognised institution in exceptional circumstances.

7. Conditions of Service

7.1 Leave

The provisions of the leave policy governing study leave will be applicable.

7.2 Study debt will be redeemed from any amount payable to the employee on resignation. If the mentioned method is insufficient the employee will be held liable to pay the amount out of own sources and will be required to sign an acknowledgement of debt prior to his/her departure from the Municipality.

8.1 Examination Leave

8.1.1 An employee shall be entitled to examination leave for all study that is in line with the employee's field of work and that would be of benefit to the Municipality.

8.1.2 An employee will be entitled to one (1) working day special leave per subject with full pay for preparation purposes and one (1) working day special leave per subject with full pay for the examination up to a maximum of sixteen (16) working days within a leave cycle.

8.1.3 In order for an application for examination leave to be considered, such application must be accompanied by an examination timetable and proof of registration relevant to the specific registered study undertaken by the employee.

8.1.4 Examination leave is only applicable to the writing of subjects on first attempt and not for supplementary or special examinations.

8.1.5 Notwithstanding the provisions of this policy, leave of absence for the purpose of examination shall be granted with due consideration to the operational requirements of the Municipality.

8.1.6 An employee will not qualify for examination leave where such study field is not in line with the employee's field of work or occupation and therefore to no benefit to the Municipality.

8.1.7 Where an employee is a beneficiary of a bursary awarded to the employee by the Municipality, such an employee shall furnish the Municipality with his/her results as soon as possible and failure to do so will result in the leave granted being converted to annual leave.

8.2 Study Leave

An employee shall be entitled to study leave for all study that is in line with the employee's field of work and that would be of benefit to the Municipality.

All study leave will be applied on a 50/50 basis up to a maximum of thirty (30) days within a leave cycle, i.e. 50% of the total number of days taken as study leave will be debited from an employee's annual leave and 50% will be granted to the employee as a form of special leave.

Where such study leave is an unequal number of days the employee will be liable for the excess days, e.g. 11 days study leave will be debited as follows:

Employee's Annual Leave = 6 days

Special Leave Granted by Municipality = 5 days

In order for an application for study leave to be considered, such application must be accompanied by an examination timetable and proof of registration relevant to the specific registered study undertaken by the employee.

Notwithstanding the provisions of this policy, leave of absence for the purpose of study shall be granted with due consideration to the operational requirements of the Municipality.

An employee will not qualify for study leave where such study field is not in line with the employee's field of work or occupation and therefore to no benefit to the Municipality.

9. Takeover of Bursaries

9.1 It will be the sole discretion of the Council, having taken cognisance of the recommendations of the Training and Development Committee, to take over existing study bursaries and loan agreements/debts from new employee's previous employer.

10. Functions of the Training and Development Committee

10.1 The Training and Development Committee shall be responsible to evaluate and approve successful candidates for awarding bursaries, and make recommendations to the Municipal Manager.

10.2 The committee will consider applications which have been submitted in the following manner:

- An application form for a bursary must be filled and signed.
- Costs for required studies must accompany the application form in the form of a pro forma invoice.

10.3 The Committee must align the choice /content of study with the skills requirements of the municipality as stated in the Workplace Skills Plan of the Municipality.

11. Administration Process

The Corporate Service Director will ensure the following:

- All successful candidates sign a letter of acceptance and a standard contract.
- Payment of registration and the educational institution fees payable to the institution.
- Leave form is submitted and approved, and loaded onto the system.
- Results are submitted immediately when they are available.
- Communication regarding progress, examination results and any change of status, with the bursar is done via the HR office.
- Accommodation, travel and subsistence allowance are payable for study purposes that are funded by the Municipality.

12. Bursary for Student Trainees

12.1 In order to uplift the standard of living in the community in the area of the Senqu Municipality's jurisdiction, the municipality may afford an opportunity to the local students to pursue their education and advancement in areas identified as critical for the Municipality.

12.2 Such bursaries may be offered on the following criteria:

12.2.1 The responsibility of the student candidate;

- The student candidate must be residing in the area of jurisdiction of Senqu Municipality.
- The student candidate must be from the designated group, the student candidate must not have the means to pay for own tertiary studies. In this regard, parents or guardian/s of applicants must furnish the Municipality with full information pertaining to their financial circumstances plus documentary proof.
- If the bursar is expelled from the institution or discontinues on the employee's own accord or fail to complete the studies, the bursary will be cancelled forthwith and all disbursement in terms of the bursary shall be regarded as an interest free loan and shall be repaid to the Municipality at a rate agreed upon.
- A satisfactory proof of enrolment at an acceptable or recognised tertiary institution must be furnished.
- The student candidate must enter into an agreement with the municipality on the following issues;
 - a) To undertake to undergo practical training as prescribed by the institution at Senqu municipality or an organisation prescribed by the institution.
 - b) To submit proof of examination results within two weeks of such results being available.
 - c) Not change the course of study as prescribed in the contract without the knowledge of the Municipality. Any change of the course of study will result in the student being liable for all expenses the municipality incurred in respect of his/her studies.
 - d) The student candidate must complete the course within the period stipulated in the contract of agreement. In the event of having to repeat three and more modules, the Municipality reserves the right to terminate his/her contract.
 - e) The student candidate commits not to substitute the institution in the contract of agreement without the consent of the Municipality.
 - f) The student candidate shall undertake to pursue his/her studies with diligence and complete the approved tuition intervention with the prescribed study period or such period as the municipality may approve.

12.2.2 The responsibility of the Municipality will: -

- 1) Be the payment of registration, tuition fees and study material as prescribed by the learning institution. The Municipality will also pay for S&Ts as per the Municipality 's S&T policy.
- 2) The termination of the contract if the student is dismissed for any reason relating to his/her conduct or capacity as a student or experiential trainee, or if the Municipality is satisfied that the student is not making satisfactory progress with the course, or did not attend lectures and/or practical classes regularly, or that it is not in the interest of the Municipality to continue to grant assistance to the learner.
- 3) To make necessary arrangements to provide the student concerned with experiential training as prescribed by the institution as part of the course,

- 4) Be to call upon any student who, in its opinion, without justification, fails to complete his/her studies/examinations set for the year in respect of which he/she received financial assistance, to repay the whole or part thereof.

12.2.3 The municipality shall not be obliged to employ the student after completion of the course, but he/she may apply for a relevant advertised post in the Municipality. The granting of such bursaries is subject to the availability of sufficient budget and are granted at the sole discretion of the Municipality.

13. MONITORING AND EVALUATION

13.1 Corporate Services is the implementing agent of this policy and shall ensure that all officials comply with the provisions thereof.

13.2 This policy shall become the official policy of the municipality once it is adopted and approved by the Council of Senqu Municipality.

14. APPROVAL OF THE POLICY

Date of Approval by Council:

Resolution Number:

M M YAWA
MUNICIPAL MANAGER

DATE



BURSARY AGREEMENT

(Entered into by: M.M Yawa in his capacity as Municipal Manager)

And

To study towards the (Learnership/ Bursary/ Learning Programme for the course of your personal gain)

COURSE : _____

INSTITUTION : _____

YEAR OF STUDY: _____

The financial study assistance to the amount of R_____ (Total amount of training and registration costs, excluding study material/including study material) calculated as of the total amount due for such studies being subsidized 100% by Council.

When an employee resign from the Council within a period equivalent to the period for which a bursary has been granted to the employee of completion of the Learnership/ Bursary/ Learning Programme, he/ she must refund the municipality for the financial study assistance as well as any monies paid by the Municipality for Travelling and Accommodation.

Declaration by an employee/student

I, _____ presently employed as _____

in the _____ Department,

Voluntary undertake:

1. To give satisfactory proof of enrolment for the above-mentioned course/ learnership of study.
2. To observe the rules of the above-mentioned learning institution.
3. To furnish the council with a certified copy of examination results in respect of any Intermediate as well as annual examinations within a period of one month after such results have been released by the relevant institution. **(Irrespective if the results are**

good or bad).

4. To serve the Council upon having obtained the above –mentioned qualification for a period equivalent to the period for which a bursary has been granted to the employee, and in the event of my services with Council being terminated for any reason prior to the completion of the above-mentioned course or to fulfilling the obligations set out in this agreement, to refund the Council an amount equivalent to the financial study assistant amount received and effectively due. The amount payable by me shall be paid by deduction from any monies which may become due to me on the termination of my services. If the mentioned method is insufficient the employee will be held liable to pay the amount out of own sources and will be required to sign an acknowledgement of debt prior to his/her departure from the Municipality.
5. To authorized the Financial Manager in the event of my services with the Council being terminated for any reason to deduct from any monies which may become due to me on termination of services, the difference between any amounts already paid by me in terms hereof and the total amount of such learning programme.
6. To refund the Council the full amount of such learning programme advanced to me should I fail to complete the course of study. The employee will still be liable for the costs incurred by council.

And furthermore, understand and agree:

- (a) That other than the first payment, further payments by the Council shall be made upon receipt from the institution concerned to the effect that my progress has been satisfactory in all relative subjects.
- (b) That if conduct, diligence or progress at any time during the period of study is unsatisfactory, the Council shall have the right to cancel this agreement and in such event I shall be required to refund the full amount expended on my account.
- (c) If the employee is excluded or expelled from the institution, or discontinues his/her studies on his/her own accord the bursary will be cancelled forthwith and I shall be required to refund the full amount expended on my account .
- (d) That the Council shall have a right to deduct any monies due by me from the leave pay-out, pro rata bonus and salary on my resignation month end.

DATED AT LADY GREY THIS _____ DAY OF _____ 20_____

DATE

SIGNATURE MUNICIPAL MANAGER

DATE

SIGNATURE DIRECTOR CORPORATE

DATE

SIGNATURE OF EMPLOYEE

DATE

SKILLS DEVELOPMENT FACILITATOR

DRAFT