

MBHASHE LOCAL MUNICIPALITY



HUMAN RESOURCE POLICY

STUDY BURSARY POLICY

MBHASHE LOCAL MUNICIPALITY

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1] PURPOSE OF THE STUDY LEAVE POLICY

The purpose of this policy is to provide for the establishment of a bursary scheme and to provide for the regulation and administration of bursaries granted to officials of the Municipality. This policy applies only to bursaries granted to officials of the Municipality. It does not provide for bursaries to be granted to children of officials, or to councillors, or to third parties.

2] BURSARY SCHEME

The Municipality recognises the need for its staff to qualify themselves appropriately for their tasks, so as to enable the Municipality to carry out its functions. The Municipality therefore wishes to encourage its officials to undertake further studies.

It is therefore the policy of the Municipality to establish a bursary scheme, as is hereby done, in order to assist suitable officials to further their studies. The annual budget of the Municipality shall make provision for bursaries.

3] ELIGIBILITY OF OFFICIALS TO APPLY

An official of the Municipality will be eligible to apply for a bursary if the following Criteria are met:

- 3.1 He or she is a full time official of the Municipality;
- 3.2 He or she has been in the continuous employ of the Municipality for not less than 12 months;
- 3.3 He or she meets the minimum registration requirements of the university, college or other educational institution ("institution") at which he or she wishes to register;
- 3.4 The field of study must be appropriate to the official's career path and current job description, or must be appropriate to the development of other skills which are important to the municipality;
- 3.5 The study programme is accredited by the South African Qualification Authority (SAQA); and
- 4.6 He or she must meet any requirements that the Municipality may have regarding academic merit and leadership potential.

4] APPLICATION FOR BURSARY

- 4.1 An eligible official may apply to the Municipality for financial assistance in the form of a bursary to study. Only applications from officials for assistance for part-time studies will be considered. Applications for assistance for full-time study will not be considered.
- 4.2 Applications for bursaries shall be made in the form contained in Annexure A. Applications are to be submitted to the Head of Department who will consider same in consultation with the Manager, Corporate Services. In considering applications, due consideration must be given to the applicant's competencies, the chosen course of study and its benefit to the Municipality.
- 4.3 The Head of Department may make recommendations regarding applicants to the Municipal Manager, who shall make the final decision whether or not to approve the application, and may attach such conditions to such approval (which shall not be inconsistent with this policy) as he or she may deem appropriate.
- 4.4 Applications for bursaries shall not be approved unless there are sufficient budgeted funds to cover such bursaries. Applications must be made separately for each year of study. Applications for subsequent years of study will not be considered unless the applicant has in the preceding year passed such number of examinations as the Municipal Manager may stipulate when approving the application.
- 4.5 The approval of a bursary in respect of any year of study does not automatically entitle the staff member to a bursary in subsequent year, notwithstanding the successful completion of examinations in any year.

5] FINANCIAL ASSISTANCE

- 5.1 If an application for a bursary is approved, the cost of approved studies, or a proportion thereof as specified by the Municipal Manager when approving the bursary, will be paid for by the Municipality as a bursary.
- 5.2 There will be no repayment obligation if the official successfully passes the course, and if the official remains in the employ of the municipality for at least as long as the period of study after completion of the year of study in question.

5.3 If the official does not pass the course, or if the official leaves the employ of the municipality before the completion of the period referred to in 5.2, the amount paid as a bursary shall be recovered by the municipality from the official.

5.4 Costs covered by a bursary may include tuition fees, examination fees and the cost of prescribed textbooks, or a proportion of any of the foregoing costs, but shall not cover any other item.

5.5 Without derogating from the generality of 5.4, financial assistance will not be provided for:

- 5.5.1 any fees which were not approved by Municipal Manager;
- 5.5.2 any cost of repeating or re-writing examinations;
- 5.5.3 any amount in respect of accommodation or travelling allowance in connection with the course; and
- 5.5.4 any penalty fees or additional amounts charged by the institution, such as a penalty or any amount charged because the official has failed to obtain the qualification concerned within such period as may be set by the institution.

5.6 The Municipality shall not make any payments to or on behalf of the official unless the official has submitted to the Municipal Manager the originals of the relevant official documentation, invoices and or receipts from the institution. Unless it is impractical to do so, all amounts payable under a bursary shall be paid directly to the institution concerned.

5.7 If an application is approved, the official shall be required to sign an agreement with the Municipality in the form contained in Annexure B. No amount shall be paid under any bursary unless and until such agreement is signed.

6] REPAYMENT

6.1 Should an official fail to complete a course of study, he or she will be liable to pay back in full the amount paid by the Municipality for that particular course. In this event, the amount will be deducted pro - rata monthly from the official's salary over a period not exceeding one year. The official shall not, however, be obliged to repay such amount if his or her failure to complete the course was due to the Municipality, having provided a bursary in any year of study, fails to provide a bursary in a subsequent year of study.

- 6.2 If at any stage during the course of study the official withdraws from the study programme for which he or she had registered, the repayment of all study assistance amounts made by the Municipality in this regard shall immediately become due and payable in the manner provided in 6.1, unless the Municipal Manager is of the opinion that such withdrawal was due to circumstances beyond the control of the official and that repayment would cause the official undue hardship.
- 6.3 An official is expected to remain in the employ of the municipality for one year for each year of study for which a bursary is granted. In the event of an official leaving the employ of the Municipality (for any reason other than retrenchment, ill health, retirement or death in service), less than one year after completing a year of study, he or she will be required to repay immediately the amount of financial assistance paid by the Municipality on his or her behalf in respect of that year of study.
- 6.4 Any amount due and payable by an official to the Municipality may be set off against any salary, payment in the form of leave or other monies owing by the Municipality to such officials

7] REPORTING

A bursary holder is obliged to:

- 7.1 Submit all results of examinations and tests to the Municipality within 7 days of same having been made available by the institution; and
- 7.2 Notify the Municipality immediately if he or she discontinues studies.

8] STUDY LEAVE

- 8.1 The total amount of time off taken for the purposes of attending lectures or classes, inclusive for the time taken in travelling to and from such lectures shall not exceed 8 hours in any calendar week.
- 8.2 No time off shall be taken by any for any purpose other than to attend lectures in connection with the course or any contravention of this requirement may result in the immediate cancellation of financial assistance. For purposes of studying and sitting for examinations, an official will be allowed such study leave as may be provided for in the Municipality's leave policy. In cases where study leave is required in addition to that permitted under the Leave Policy, such additional leave must be taken as ordinary leave.

9] **THESES**

6.1 All dissertations/theses/treatises required to be submitted to the institution by officials in fulfilment of requirements towards degrees or diplomas or any other study activities are to be approved by the Municipal Manager who is to satisfy himself/herself that no confidential information will be included therein.

10] **WITHDRAWAL OF FINANCIAL ASSISTANCE**

Any Financial Assistance granted to an official will be withdrawn by the Municipal Manager where such official:

- 10.1 is refused permission by an institution to continue his/her studies;
- 10.2 breaches any provision of this Policy,
- 10.3 is suspended by the institution for whatever reason;
- 10.4 terminates his or her employment or is terminated by the Municipality on the grounds of misconduct;
- 10.5 is discovered to have utilised any leave granted to him or her for a purpose other than to attend lectures or classes or studying or for sitting examinations in connection with the approved course being undertaken by such official;
- 10.6 ceases to attend his or her approved course without a reasonable or satisfactory explanation;
- 10.7 fails to show satisfactory progress in his studies ; and
- 10.8 if financial assistance is withdrawn, the outstanding amount of which has been paid to or on behalf of the official up to and including the date such cancellation shall immediately and unconditionally become due & payable by the official to the Municipality.

11] **WAIVER REFUND**

11.1 Where an official is made redundant, is retrenched or medically boarded by the Municipality or dies, the refund of any outstanding amounts in respect of such Financial Assistance will be waived with effect from the date of redundancy, retrenchment, medical boarding or death.

12] NO EXPECTATION OF PROMOTION

12.1 The completion by an official of any course of study shall not give rise to any right or expectation of automatic promotion, increase in salary or any other benefit.

13] POLICY REVIEW

The responsibility for developing, coordinating, implementing and monitoring this policy shall reside jointly with the Head of Department: Human Resources & Administration of the MBHASHE Local Municipality. Changes that might affect the policy will be done ad hoc or during the tri-annual review in consultation with the staff and the representative of Trade Unions.

ANNEXURE "A"

APPLICATION FOR A BURSARY (COUNCIL OFFICIALS)

All applications must be submitted to the Head of Department of the Applicant. A copy of your LATEST PAY SLIP must be attached to this application.

1. PERSONAL PARTICULARS

Name:

.....

Job Title:

.....

Dept.: Pay Number:

.....

Date of employment:

.....

2. APPLICATION

I hereby apply for a bursary in the amount set out below for purposes of undertaking Studies as indicated below.

I submit the following information in support of my application:

.....
.....
.....
.....
.....

3. PROPOSED STUDY

Degree/Diploma/Course:

Institution:

.....

Total subjects: Academic Year:

.....

Subjects are:

.....
.....
.....
.....
.....

When do you propose to complete abovementioned subjects?

.....
.....
.....
.....
.....

4. PREVIOUS RECORD

COURSE COMPLETED:
.....
YEAR:

5. TUITION FEE

Amount made up as follows:

Registration fees
R.....
Course fees
R.....
Book fees
R.....
TOTAL
R.....
...

6. AMOUNT APPLIED FOR:

R.....

7. SIGNATURE OF APPLICANT:

.....

Date:
.....

9. COMMENT OF THE HEAD OF DEPARTMENT

Abovementioned application is recommended/ not recommended. If not recommended – give reason.

.....
.....
.....
.....

DATE
.....
SIGNATURE
.....

10. MUNICIPAL MANAGER'S APPROVAL

APPROVED / NOT APPROVED

APPROVED, SUBJECT TO THE FOLLOWING CONDITIONS:

DATE

.....

SIGNATURE

.....

ANNEXURE "B"
MEMORANDUM OF AGREEMENT

ENTERED INTO BY AND BETWEEN:-

MBHASHE MUNICIPALITY

(Duly represented hereinafter by [] in his capacity as [], authorized thereto by
Virtue of a Council Resolution of the [] Municipality

(Hereinafter referred to as "the Municipality") And

.....
.....

Identity number:
(Hereinafter referred to as the OFFICIAL)

WHEREAS:

The OFFICIAL is desirous to complete a course known as:-

.....
.....
.....
.....

At:

.....
.....

(Hereinafter referred to as ("THE EDUCATIONAL INSTITUTION")) and has applied for a
study Bursary for the academic year in the amount of

And whereas the Municipality agrees to grant such study bursary subject to certain
conditions which are acceptable to the OFFICIAL, who wishes to accept the bursary,

BOTH PARTIES THEREFORE AGREE AS FOLLOWS:-

1. The OFFICIAL will register
As a part-time student from (date).....in the (field of
study)
..... at (Institution)
.....

2. The Municipality hereby grants a bursary in the aforesaid amount to the OFFICIAL in
order to assist him / her financially to enrol for and successfully complete the study as
indicated in Clause 1.

3. The terms and conditions under which the Municipality grants the bursary are stipulated in
the Municipality's Bursary Policy, which is an integral part of this Agreement.

4. The OFFICIAL hereby accepts the bursary and accepts the said terms and conditions.

5. The OFFICIAL chooses as his/her domicile citadel ET executants,
For the purposes of this Agreement, the following address:
.....

.....
.....
.....

THUS DONE AND SIGNED at on this Day of
.....200 for the Municipality

WITNESSES:-

1.
.....
2.
.....

THUS DONE AND SIGNED at on this Day of 200.

.....
OFFICIAL

WITNESSES:-

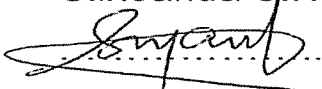
1.
.....
2.
.....

AUTHORITY

Approved by Council and Signed by:


.....
M Nako
Acting Municipal Manager

03/07/2017
.....
Date

Cllr. Janda S. N

.....
MAYOR

03/07/2017
.....
Date