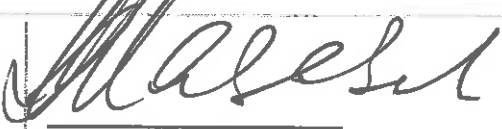




KWAZULU NATAL PROVINCIAL TREASURY

BURSARY POLICY

Signed:	 MR LS MAGAGULA
Designation:	HEAD OF DEPARTMENT
Date:	05/07/2016

1. Introduction

The KwaZulu-Natal Provincial Treasury acknowledges the right of each person to have access to education and training in compliance with the Constitution of the Republic of South Africa 1996. As a result, the Department is committed to making further education and training available and accessible to serving employees and prospective employees through the implementation of a bursary scheme. This affords employees and prospective employees the opportunity to equip themselves in a formally structured manner on the basis of identified requirements in the interest of the Department, with enhanced knowledge and skills to undertake present and/or future duties diligently and satisfactorily.

2. Scope of applicability

This policy is applicable to all bursary holders and must be adhered to in order to ensure uniformity within the Department.

3. Objectives

The objectives of the bursary scheme is to:-

- a) set out the parameters in accordance with which this Department may financially assist officials to acquire the necessary qualifications, to perform specific occupational tasks and general administrative tasks for a more dynamic broad public service.
- b) grant financial assistance to employees who undertake studies at recognized academic institutions for a recognized qualification, in specifically identified areas that are relevant and are to the advantage of this Department and the officials current work functions or career path.

4. Legislative Framework

Constitution of the Republic of South Africa 1996 (Act 108 of 1996);
Public Service Act, 1994 as amended (Proclamation 103 of 1994);
Public Service Regulations, 2001 as amended;
Skills Development Act 1998 (Act No 97 of 1998) and

5. DEFINITIONS

5.1 BURSARY

Financial assistance by the department for the tuition, registration and examination fees of officials who are studying part-time or on a correspondence basis, towards diplomas, degrees and post graduate qualifications offered by recognized institutions registered with the South African Qualifications Association (SAQA).

5.2 BASE QUALIFICATION

A base qualification has a minimum period of three years or as prescribed by the recognized institution for the attainment of a certificate / diploma / degree.

5.3 SERVING OFFICIALS

Are those employees who are currently employed, in a permanent capacity i.e. not on probation by the Department. An exception are those employees who have been on probation for at least 10 months can apply for state aided studies and the final approval will be made after the employee's appointment has been confirmed.

5.4 OUT OF SERVICE BURSARS

Are individuals who are not employed by the Department but are wishing to study towards a qualification that is relevant to the functions of the Department.

5.5 RECOGNIZED ACADEMIC INSTITUTIONS

These are academic institutions that are accredited with the Council for Higher Education (CHE).

6. CONDITIONS UNDER WHICH A BURSARY ASSISTANCE MAY BE GRANTED

6.1 SERVING OFFICIALS

- a) Bursaries may be granted to serving employees for the duration of their studies provided that the amount granted does not exceed the cost of tuition, registration and examination fees for the minimum number of subjects recommended for the relevant qualifications. Any cost pertaining to study material or resulting from the attendance (includes traveling costs) of lectures or workshops etc, must be borne by the employee.
- b) Employees studying towards the attainment of a qualification which is in line with the core functions of the post, must be given preference in the granting of financial assistance over those who wish to study towards a post graduate qualification or higher, unless it can be clearly illustrated why preference should be given to an employee who already has a base qualification.
- c) An employee receiving financial assistance, who fails in any subject or year of study, must immediately repeat the subject/s failed in the following year, at his/her own expense. If the employee discontinues his/her studies or does not repeat the relevant subject/s, the employee will be liable to repay the fees that have already been paid with interest from the date the contract was breached. If, however, the employee repeats the relevant subjects successfully, the financial assistance granted to him/her will continue for the remainder of the qualification.
- d) The total period of study towards a qualification must not extend for more than the maximum prescribed duration as determined by the recognized institution.
- e) Deferment of studies will only be considered provided sufficient grounds exist and are approved by the Human Resource Training and Development Committee.
- f) Employees must study at a locally recognized institution. Most economical studies at overseas institutions will only be considered if the same / similar qualification cannot be obtained in South Africa and that it is a need for the department. This will be subject to the availability of funds.

6.1.1 Bursary obligation

Successful applicants should take note of the following obligations upon approval:

- i) Pro-forma invoice for payment of tuition fees must be submitted to the HRD office within two weeks of obtaining bursary and also at the beginning of the semester for semester students and at the beginning of the year for annual students upon obtaining academic results.
- ii) Examination results should be submitted within two weeks of release.
- iii) In order for subsequent payments to be made by the department, a bursary holder would have failed no more than 1 module for current registered modules.
- iv) No payments will be made for repeated modules.
- v) Approval to change the field of study will be granted subject to, and on condition that the bursary holder will pay for courses in the new field of study (taking into account credits obtained from the previous field of study) equivalent to an amount funded by the department for the previous study. The department will then continue paying for additional tuition costs.
- vi) Applications for the suspension and/or extension of bursary contract should be submitted in writing.
- vii) Approval for suspension and extension of bursary contract will only be granted once, thereafter no further requests will be considered.
- viii) A bursary contract will only be suspended or extended for a period of one year.
- ix) Approval for bursary suspension and extension will depend upon seriousness and nature of cause, therefore no extension or suspension will be granted due to work commitments etc. It is the responsibility of the bursary holder to manage time. Extension and suspension of bursary contract will only be granted up to a period of one year.
- x) **The Department will not pay for textbooks and lecture notes.**

Non-compliance with the above will constitute a breach of contract and a debt will be set up against the bursary holder.

6.2 OUT OF SERVICE BURSARIES

6.2.1 Bursaries will be granted in accordance with the strategic objectives of the Department.

6.2.2 The Department will award bursaries to out of service bursary holders based on their academic achievements and financial position. This will be considered subject to the availability of funds.

6.2.3. The following criteria must be considered when awarding bursaries to external applicants:-

- a) Preference will be given to students who display an excellent academic record (Grade 12- June Examination results or records supported by tertiary institutions).
- b) The student must be able to demonstrate that due to verifiable limited financial resource that he/she cannot afford the cost of the studies.
- c) Out of service bursaries will be offered to previously disadvantaged persons only, more so in line with Department's Employment Equity targets.
- d) The student has a responsibility to provide the Department with all tests and exam results.
- e) Students must be prepared to bind themselves contractually to serve the department after completion of studies, equivalent to the number of years the bursary was granted.
- f) Should the bursary holder leave the Department prior to the expiry of the obligation, he or she shall be liable to re-imburse the Department (while serving a service obligation) for the remaining period that he or she has not served. (Calculation: remaining period (months)/total service period/months X total bursary cost the Department incurred).
- g) The stipend paid will be equivalent to the minimum notch for salary level 7 for National Diploma, Bachelor Degree and above qualifications. The stipend for National Certificates plus completion of in-service training requirement will also be at salary level 7.

6.2.4 The bursary will cover the following:

- a) Tuition fees,
- b) Meals, (applicable only if residence costs are being paid for and in line with each costs charged by the academic institution)
- c) Accommodation (applicable only if student resides more than 50km from campus), and
- d) Books (actual cost of prescribed books only)

6.2.5 Further costs such as the purchase of stationery, prescribed reading material, attendance of workshops, seminars, miscellaneous fees or supplementary or aegrotat or special examination matriculation board fees (for exemption purposes only) and traveling fees shall be borne by the bursary holders.

6.2.6 In the event of a bursary holder wishing to temporarily suspend or discontinue his or her studies or where he or she made unsatisfactory academic progress, it will be incumbent upon him/her to immediately make a formal request to the department for a deferment of contractual obligation. He or she must present the Department with a proposal to enable him or her to complete the relevant qualification on his or her own time and at his or her own expense to avoid immediate steps being taken to institute a recovery of bursary amount. However, this deferment shall not exceed a period of two (2) years without prior approval of the Head of Department.

6.2.7 In the case of a bursary holder who fails to complete his or her studies satisfactorily and/or does not fulfill his or her service obligation, an "out of service" debt will be instituted against him or her and he or she may be liable for the full payment of the bursary amount (including interest) which was granted to him or her.

6.3 ADMINISTRATIVE REQUIREMENTS

- a) A bursary holder must submit the relevant requests for the payment of registration fees, examination fees and tuition fees, at least 2 weeks before registration, in order to allow for sufficient time for the administration processes to be completed and payment to be made timeously. Should it be found that delays are experienced due to bursary holders not submitting the relevant documentation timeously, such employees will be requested to make the necessary payment to the institution concerned and then claim re-

imbursement from the department. Any penalties / interest as a result of late payment will not be reimbursed / paid by this department.

- b) Examination dates and expected leave requirements must be submitted by 15th February of each year to Managers or within two (2) weeks of receiving notification thereof with regards to semesterised courses.
- c) Submission of prior year results must be presented within two (2) weeks of receiving the results before any further financial assistance will be provided.
- d) The line manager should support granting of financial assistance and non-support should be substantiated with valid reasons.
- e) The Departmental Training Committee will consider new bursary applications twice a year. All relevant background information regarding bursary applications will be considered by the Committee.
- f) Every successful applicant must complete and sign an undertaking and must initial every page. This undertaking then becomes a legal and binding bursary contract.
- g) No money will be paid on behalf of an employee if this undertaking is not completed and signed correctly and submitted to the bursary section.
- h) The Department shall pay from date of approval of bursary, respective costs. There will not be any re-imbursement for partial studies already completed at the bursary holders cost.

7. CRITERIA TO BE CONSIDERED WHEN AWARDING BURSARIES / STATE AIDED STUDIES

The following criteria is considered when awarding financial assistance to officials:-

- a) The objective of the bursary scheme is to grant financial assistance to employees who undertake studies towards fields of recognized qualifications at recognized academic institutions (institutions that are accredited with the Council for Higher Education).
- b) Those employees who are employed, in a permanent capacity (i.e. not on

probation) by the Department are eligible for a bursary. Employees who have been on probation for at least 10 months with satisfactory performance rating can also apply for state aided studies.

c) Bursaries must be awarded in order of priority as per the following provided funds are available:

- ✓ Senior Certificate
- ✓ FET Qualifications leading to a National Diploma
- ✓ National Diploma
- ✓ Undergraduate Degree / B Tech
- ✓ Honours
- ✓ Masters
- ✓ Doctorate

(Qualification types not listed above will be equated in terms of its NQF rating to the current NQF Framework - provided these are full qualifications and not short certificate courses). Bridging courses are not funded.

- d) The area of specialization must be relevant to the official's current work / career path in terms of current post.
- e) The NQF level (using the new NQF) of the envisaged studies must be progressive to the current qualification (exceptions for lateral qualifications would be in instances where existing qualifications affect career progression in terms of upward mobility).
- f) The bursary does not cover overseas studies unless it can be proven that such a course is not available within South Africa. Further, as far as possible preference will be given to institutions within KZN unless such courses are not available or the studies are done through correspondence.
- g) Ex- bursary holders that are paying off a debt will not qualify for another bursary until the debt is fully paid.
- h) A current bursary holder will not be granted financial assistance to study towards another progressive qualification up until he/she complies satisfactorily with the current qualification that is being sponsored by the department.

8. POST-GRADUATE STUDIES

Studies towards postgraduate qualifications may be considered for bursaries, depending on the relevance of the course and the availability of funds. The final approval must be granted by the Head of Department

9. CONTRACTUAL AGREEMENT

- 9.1 Redemption of the contract period for an employee, who studies part-time in terms of undertaking services of the department, begins after the attainment of the relevant qualification. The serving employee must serve the Department for at least one year after attaining the relevant qualification.
- 9.2 If the obligation cannot be fulfilled owing to death or incapacity due to any mental or physical disability, any liability for the outstanding moneys, which may be due in terms of the undertaking, shall lapse.
- 9.3 If an employee leaves the Department before completing his / her studies (with the exception of a transferring official where the receiving Department is agreeing to take over the bursary) or does not make satisfactory progress towards obtaining his / her qualification, and / or elects not to continue with his / her studies, the employee must re-imburse the Department a full amount of the bursary that was (plus interest accruing from date of breach of contract as prescribed by National Treasury) granted to him / her. In the case of the person who leaves the public service, the amount owing will be reclaimed from his / her pension money, failing which an “out of service” debt must be set up and recovered.
- 9.4 Where an employee completes his/her qualification but fails to undertake the last year of service with the department, he/she will be liable to repay the full amount of the bursary that was granted to him/her.
- 9.5 In the event of an employee wishing to temporarily suspend or discontinue his/her studies or having made unsatisfactory academic progress, it will be incumbent upon him/her to immediately request the Department for a deferment of contractual obligation which must be approved by the Human Resource Training and Development Committee.
- 9.6 All employees must submit their results within two (2) weeks of the institution making them available, failing which they will be deemed to have breached the contract.

- 9.7 An employee can be granted a bursary extension on the following conditions:
- (a) The maximum time institutions allows an official to complete his/her degree/diploma
 - (b) An extension can be granted up to three times within the time frame institutions allow an official to complete his/her degree/diploma.

10. CHANGE IN STUDY DIRECTIONS

- 10.1 Authority may be granted by the Human Resource Training and Development Committee to officials to change their direction of study or institution provided that:-
- a) The new field of study complies with the criteria laid down in above.
 - b) The student repeats an equal number of subjects, at his/her own expense, for which the Department has paid in respect of his/her initial study, or repay the costs already incurred by the department for the previous course of study.
 - c) If the change is at the instance of the Human Resource Training and Development Committee the department shall bear the costs.
 - d) No more than two changes from institution or study direction will be accepted unless there are extreme circumstances to be considered.
- 10.2 Should an academic institution discontinue a qualification, a change to an alternative field of study may be allowed provided that:
- a) Field of study is related to the functions/ careerpath of the employee.
 - b) Maximum credits can be obtained for the initial qualification.
 - c) The employee had yielded satisfactory progress in the initial qualification.

Based on these merits the department will decide to what extent it will pay in lieu of the losses due to change.

- 10.3 In the event of voluntary change, the department will not pay for bridging courses.

11. TAKE-OVER OF BURSARIES

- 11.1 An official who transfers from one Department to another is regarded as having cancelled the contract.

- 11.2 A take-over of a bursary contract may, however, be negotiated between Departments.

- 11.3 The take-over of a bursary contract may include the receiving Department financially re-imbursing the Department, which granted the bursary, for any year of study, which has not yet been redeemed by service obligation. The responsibility for any future financial/service obligations resulting from the granting of the bursary will be borne by the receiving Department.

12. ADMINISTRATION OF BURSARIES

- 12.1 In view of the importance accorded to training and development, it is essential that adequate provision on the establishment structure be made for a component to administer/ manage bursaries in an efficient and effective manner.

- 12.2 A Bursary register/database, containing the following information:

- (a) Bursary applicant;
- (b) Course/degree;
- (c) Period of contract;
- (d) Date of payment;
- (e) To whom paid;
- (f) Amount paid;
- (g) Student number;
- (h) Year of study;
- (i) Results and date of submission;
- (j) Number of courses repeated.

13. CORRESPONDENCE

To avoid unnecessary delays and errors in the processing of any documentation relating to an official's studies, all correspondence directed to the Senior Manager: Human Resource Management and Development must contain the following:

- (a) Surname and initials;
- (b) Persal number;
- (c) Student number and
- (d) Institution.

14. BREACH OF CONTRACT

The following cases constitute a breach / cancellation of contract and the required action to be taken by the official concerned is listed below:-

14.1 *Failure to pass all subjects/courses/modules in a calendar year.*

Date of breach: - is the date results should have been submitted (2 weeks after released by institution)

Action required: -

- (i) Official to re-write the subject(s) at own cost.
- (ii) Failure to re-write subject(s) will result in an instant breach of contract unless the subjects are re-written in the following semester or as per an arrangement with the Bursary Section. The official is liable to pay the full-amount paid by the Department for all subject(s) plus interest from the date of breach.

14.2 Failure to pass certain subjects/modules/courses in a calendar year

Date of breach: - is the date results should have been submitted (2 weeks after released by institution). Action required:-

- a) Where failure has no bearing on continuing to next year of study,

the official is to:-

- (i) Re-write the exam at own cost;
 - (ii) Failure to re-write subject(s) will result in an instant breach of contract unless the subjects are re-written in the following semester or as per an arrangement with the Bursary Section. The official is liable to pay the full-amount paid by the Department for all subject(s) plus interest from the date of breach.
- (b) Where the following year of study is affected:-
- (i) It is the onuses of the official to request that the contract be suspended until such time as the following year of study can be resumed.

14.3 Where an official transfers to another department

- (a) Passes all modules at the end of the year :-
- (i) Transfers mid-year:- Enters into new contract with the department which agrees to take over the service obligation
 - (ii) Transfer at end of year:- Enters into new contract with the receiving department
- (b) Fails certain modules:-
- (i) The official must repay this department the full amount of the modules failed plus interest (if no payment is received, this implies a breach in contract for which the official will be liable for full cost) and
 - (ii) Enter into a new contract with the receiving department

14.4 Where an official fails to continue undertaking studies:-

- (i) Mid-year :- Repay a full amount of the bursary plus interest from date of payment for the year of study
- (ii) At the end of calendar year an official does not continue studies in the New Year, the official must complete the years service obligation or repay the bursary plus interest from day of payment.

14.5 Where an official fails to complete the required year/s of service:-

- (i) repay the department's portion of the bursary granted in relation to the period of service not undertaken.

15. TERMINATION DURING SERVICE OBLIGATION (OUT OF SERVICE BURSARIES)

The bursary holder shall be liable for the total bursary cost as he/she must redeem the bursary by serving the department on the basis of one year for each year of study.

16. PRACTICAL TECHNICAL TRAINING OF STUDENTS

The department will afford students (who are funded by the department) an opportunity to obtain practical experience in the department relevant to their studies. Such students will be reimbursed per the subsistence and travel rates as applied by the Office of the Premier. Applications should be made by February of each year to the Human Resource Management and Development Directorate, in order to identify the needs and assess whether the department is in the position to provide the necessary experience.

17. CONCLUSION

In conclusion, it is pointed out that each application for financial assistance for a bursary will be judged on its own merit and due consideration will be given to those applicants who wish to study in those fields where a shortage of skills exists. Therefore, persons who wish to study should be given careful consideration to the field of study, their capabilities, aptitudes and talents when deciding on a course of study.

18. COMMUNICATION

The Directorate: Human Resource Management and Development is responsible for communicating this policy to all employees within the department.

19. MONITORING AND EVALUATION

The Directorate: Human Resource Management and Development is responsible for the development and regular review of this policy document.

Any inputs or amendments regarding this policy can be directed to the abovementioned component for the attention of Senior Manager: Human Resource Management and Development.