



## ANNEXURE

MOGALE CITY LOCAL MUNICIPALITY

# BURSARY POLICY

2024 -2025

APPROVED

## DOCUMENT MANAGEMENT

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## TABLE OF CONTENTS

1.	ABBREVIATION AND TERMS .....	4
2.	EXECUTIVE SUMMARY .....	5
3.	INTRODUCTION .....	5
4.	OBJECTIVES .....	6
5.	LEGISLATIVE FRAMEWORK.....	6
6.	SCOPE AND APPLICABILITY.....	6
7.	KEY PRINCIPLES .....	6
8.	ROLES AND RESPONSIBILITIES .....	7
9.	POLICY CONTENT .....	8
10.	BURSARY HOLDERS FILE.....	9
11.	IMPLEMENTATION OF THE POLICY .....	11
12.	FINANCIAL IMPLICATIONS.....	11
13.	MONITORING AND EVALUATION OF THE POLICY.....	11
14.	POLICY AMENDMENT AND REVIEW .....	11
15.	COMMUNICATION.....	11
16.	COMPLIANCE .....	12
17.	PRECEDING POLICIES RESCINDED .....	12
18.	APPROVAL .....	12

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## 1. ABBREVIATION AND TERMS

### 1.1 Abbreviations

ABBREVIATION	DEFINITIONS
MM	Municipal Manager
CSS	Corporate Support Services
EEA	Employment Equity Act
EM	Executive Manager
HRM	Human Resources Management
L&D	Learning & Development
LGSETA	Local Government Sector Education Training
LRA	Labour Relations Act
MCLM	Mogale City Local Municipality
NSDS	National Skills Development Strategy III
NQF	National Qualifications Framework
SAQA	South African Qualifications Authority
SDA	Skills Development Act
SDF	Skills Development Facilitator
SDLA	Skills Development Levies Act
SETA	Sector Education and Training Authority
SOP	Standard Operating Procedure
CHE	Council for Higher Education (i.e., Universities, Colleges, TVET)

## 1.2 Terms

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

TERM	DEFINITIONS
Academic year	A stipulated period within which an employee attends in an academic institution.
Bursary	Financial assistance provided for by the employer to enable the employees to further their studies.
Bursary holder	Any employee who is permanently employed and is granted approval for an opportunity to study at an institution of their choice
Contact classes	Face to face interaction with a tutor and/or lecturer
Qualifying employees	Any permanent employee who has been within the employment of Mogale City Local Municipality for a minimum period of one year
External sponsorship	Any form of financial assistance from external source
Post-graduate studies	Relates to studies done after earning a first qualification
Undergraduate studies	Studying in a university/College for a first degree/diploma. All the academic studies up to the level of a bachelor's degree or equivalent
Special Leave arrangement for class attendance.	An internal procedure in terms of MCLM leave policy to undertake study schools' programmes for a period not exceeding 20 days per annum
Examination and Study	A written or oral assessment as per university /College requirements and the number of days approved for study including the day of examination

## 2. EXECUTIVE SUMMARY

Mogale City Local Municipality (MCLM) recognizes the need to assist employees who would like to pursue their studies at institutions of higher learning accredited by the Council for Higher Education (CHE).

The acquisition of a formal qualification at a higher learning institution equips employees with knowledge that is vital for career advancement which will advance the Municipality through improved productivity and enhanced competencies. This policy provides guidelines for granting financial assistance to employees.

## 3. INTRODUCTION

Mogale City Local Municipality acknowledges the fact that it is operating in an environment where most of the human capital requires training. The Municipality also acknowledges the fact that to sustain economic development, its human capital must be empowered in order to contribute significantly to the economy.

Therefore, the Municipality commits itself to addressing these development areas through encouraging and implementing human resource development interventions in line with the relevant legislations. This will be realized by, among others, the granting of bursaries to the qualifying employees to further their

studies and acquire the skills needed to make them competent and that are directly relevant to the current position and/or division.

The MCLM also promotes the concepts of self-development, lifelong learning, and continuous improvement. All stakeholders of MCLM must fully align themselves with all efforts and initiatives to establish the MCLM as a learning organisation.

#### **4. OBJECTIVES**

The Bursary policy strives to achieve the following:

- i. To encourage a culture of lifelong learning aimed at sustaining the supply of intellectual capital;
- ii. To provide a framework to facilitate the application, selection and the administration process of the bursary scheme;
- iii. To encourage and support employees at all levels to obtain qualifications in areas where skills gaps have been identified;
- iv. To provide equal opportunities to all employees in line with the MCLM's Employment Equity Plan and Workplace Skills Plan.

#### **5. LEGISLATIVE FRAMEWORK**

- i. The Constitution of Republic of South Africa, Act No. 108 of 1996
- ii. South African Qualification Authority (Act of 1995)
- iii. Skills Development Act (Act 97 of 1998)
- iv. Skills Development Levies Act (Act 9 of 1999)
- v. Employment Equity Act (Act 55 of 1998)
- vi. Labour Relations Act (Act 66 of 1995)
- vii. National Skills Development Strategy III
- viii. Municipal Finance Management Act (Act 56 of 2003)
- ix. Municipal Systems Act 32 of 2000
- x. National and Provincial Capacity Strategies

#### **6. SCOPE AND APPLICABILITY**

The Bursary Policy applies to all permanent employees who have been within the employment of Mogale City Local Municipality for a minimum period of one year.

#### **7. KEY PRINCIPLES**

MCLM shall adhere to the following key principles in the implementation of the Bursary Policy:

- i. All bursary application shall be approved on merit.

- ii. A potential bursary holder must have entered a development plan with the direct supervisor.
- iii. A course of study must be relevant to the current position / within the field of a division and individual career path.
- iv. A formal bursary application process must be followed within the stipulated timeframes.

## **8. ROLES AND RESPONSIBILITIES**

### **8.1 Council**

It is the responsibility of Council to approve the Bursary Policy.

### **8.2 The Municipal Manager**

It is the responsibility of the Municipal Manager to oversee the implementation of the approved Bursary Policy, Process Flow and SOP.

### **8.3 Executive Managers**

It is the responsibility of the EM CSS to approve bursary applications, subject to availability of funds.

### **8.4 Executive Managers and Line Managers**

It is the responsibility of all Executive Managers and Line Managers to:

- i. Acquaint themselves with Bursary Policy, Process Flow and SOP
- ii. Communicate the contents of the Bursary Policy, Process Flow and SOP to all employees in their departments.
- iii. Ensure and oversee the correct implementation of and adherence to the approved Bursary Policy, Process Flow and SOP

### **8.5 Human Capital Management**

It is the responsibility of HCM to:

- i. Monitor the consistent implementation of the Bursary Policy
- ii. Communicate the approved Bursary Policy to all employees within the Municipality.
- iii. Ensuring the alignment of Bursary Policy with all HR Policies and Council resolutions of MCLM

### **8.6 Learning and Development**

It is the responsibility of L & D to:

Facilitate and administer the implementation of the bursary policy.

### **8.7 Expenditure Management**

- i. It is the responsibility of Expenditure Management to ensure that all bursary related payments are processed on time.
- ii. The bursary shall be paid directly to the learning institution where the bursary holder will be pursuing his/her studies.

## **8.8 Trade Unions**

It is the responsibility of the Trade Unions Representatives to fully participate in the bursary allocation processes.

## **8.9 Bursary Committee**

It is the responsibility of the bursary committee to screen bursary applications in accordance with the policy objectives and to make recommendation to EM CSS for approval.

## **8.10 Employees**

- i. All employees are responsible for adhering to the conditions of the approved Bursary Policy.

# **9. POLICY CONTENT**

## **9.1 Bursary Administration**

### **9.1.1 Bursary Advertisement and Application Process**

Applications for the bursary shall be open to all qualifying employees provided they are in line with the skills and competency requirements of MCLM.

#### **9.1.1.1 Advertisement**

The L & D subdivision shall publish an advertisement inviting prospective applicants who wish to apply for bursaries on an annual basis. The advert shall be circulated for first time applicants via intranet, e-mail, and all notice boards by the 1<sup>st</sup> of October with closing date being the 30<sup>th</sup> of November every year.

**This submission date applies to all applicants whose classes will commence in January (1<sup>st</sup> semester intake) and July (2<sup>nd</sup> semester intake) respectively.**

#### **9.1.1.2 Application Process**

The applications shall be on the prescribed form (i.e. the Bursary Application Form), must be completed in full and be accompanied by:

- i. A copy of applicant's individual development plan that is relevant to current position, divisional mandate or MCLM's priority goals.
- ii. A certified copy of the academic reports/ transcripts, qualifications as well as the quotation for the prospective year of study.
- iii. A provisional acceptance letter from the learning institution where the applicant intends registering.



- iv. The application form together with the documents referred to above, must be forwarded to the L&D sub-division for processing.
- v. L & D sub-division shall consolidate and compile a list of applicants and submit it to the Bursary Committee.
- vi. The Bursary Committee will screen and recommend the qualifying applicants for approval to the Executive Manager Corporate Support Services.

## **10. Bursary Holders Files**

The L& D sub-division shall open bursary files for the Employees who have been granted bursaries. The following documentation shall be placed in the file:

- i. Completed Bursary Application Form;
- ii. Individual development plan
- iii. Signed Bursary Contract;
- iv. Letter of Consent;
- v. Proof of payment(s) made to institution (i.e., receipts);
- vi. Examination time-table;
- vii. Statement of results

### **10.1 Conditions for bursary holders**

#### **10.1.1 Conditions for existing bursary holders**

The conditions for granting bursaries to Employees shall be as follows:

- i. The employee who has been granted a bursary shall enter into a signed contract with MCLM.
- ii. The bursary holder must complete the course (s)he/she has registered for.
- iii. No bursary assistance shall be awarded to an employee if the study is not relevant to the employee's present and future functions and in line with the career progression of the employee.
- iv. The course of study must be pursued at an accredited learning institution.
- v. Where studies are undertaken on a year-to-year basis, the bursary redemption service shall run concurrently with the studies pursued during the subsequent academic year of study.
- vi. In a case where the course of study takes a period of one year, the bursary holder shall on completion of the course be obliged to remain in the employ of the Municipality for a period of six months.
- vii. In the event that the bursary holder decides to leave the Municipality before the lapse of six months, the Municipality will be entitled to recover from the bursary holder the pro-rated amount which MCLM would have spent for the bursary holder.
- viii. The monies shall be recovered from the bursary holder's final payment/ remunerations.
- ix. In a case where the course of study takes a period of more than three (3) years, the bursary holder shall on completion of the course be obliged to remain in the employ of the Municipality for a period of one year six months.
- x. In the event that the bursary holder decides to leave the Municipality before the lapse of a period of one year six months, the Municipality will be entitled to recover from the bursary holder the amount which MCLM would have spent for the bursary holder for that academic

period/year. The monies shall be recovered from the bursary holder's final payment/remunerations.

- xi. Provisions of clauses 10.1.1(vii) and 10.1.1.(viii) shall apply mutatis mutandis to any other period of study undertaken by the bursary holder.
- xii. The bursary holder shall submit results within a month after release of the results by the learning institution. Failure thereof will result in clause (vii) and (viii) above being applied.
- xiii. In the event the bursary holder fails to meet his/ her academic requirement, the bursary holder will not be legible for additional financial assistance for any other course qualification,
- xiv. In a case where an applicant decides to pursue another qualification that is recommended by the line manager and approved by the Executive Manager: Corporate Support Services, the amount initially paid for the first qualification shall be recovered in full from the applicant before the approval of the second qualification from his/her **Available Leave Days/ Salary**;

## **10.2 Special Leave arrangement for Classes attendance**

10.2.1 The bursary holder shall be allowed time-off to attend Contact Classes/ Study Schools (block release).

10.2.2 The number of study days shall be allocated as follows:

- i. For Undergraduate Studies: **maximum of 20 working days per academic year**. If the employee exceeds 20 working days, he/she will utilize his/her annual leave days.
- ii. For Post-Graduate Studies/ also this includes research purposes: **maximum of 20 working days per academic year**. If he/she exceeds 20 working days, he/she will utilize his/her annual leave days.
- iii. The bursary holder shall qualify for One (1) day special leave for examination preparation and one (1) day for writing examination.
- iv. All applications for paid special leave stated above must be accompanied by the necessary supporting documentation.
- v. Employees who are paying for their studies (own expense) shall enjoy the same benefit of special arrangement as stipulated in clauses *above*.

**NB: The recipient of the Bursary shall apply for the study leave through the Electronic Leave System of the MCLM. No bursary holder shall be allowed to commence his/her study leave without prior approval.**

## **10.3 Employees on external sponsorship**

- i. Where an employee pursues full-time studies on an external bursary/scholarship, the Employee shall have the option of either voluntarily terminate his/her services at the commencement of studies or may elect to take unpaid leave for the normal duration of the course of study.

- ii. On completion of studies, the employee who would have opted for unpaid leave, shall be reinstated to his/her substantive position.

### **10.3 Nature and extent of the bursary**

The nature and extent of Bursary assistance to be granted shall be as follows:

#### **10.3.1 Undergraduate Studies: For Employees**

<b>No.</b>	<b>Expense Description</b>	<b>Amount</b>
1	Registration fee	R20,000.00 per annum
2	Tuition fee	
3	Examination fee	

#### **10.3.2 Procedure for Amendment**

The allocated bursary amount shall be increased on an annual basis linked to CPI (Consumer Price Index).

### **11. IMPLEMENTATION OF THE POLICY**

The Bursary Policy will be effective once approved by Council and signed by the Municipal Manager.

### **12. FINANCIAL IMPLICATIONS**

MCLM shall set aside a budget for the Bursary scheme for each financial year to provide financial assistance to employees who would like to pursue studies at learning institutions. The budget allocation shall be guided by the skills gaps/ requirements and priorities of MCLM.

### **13. MONITORING AND EVALUATION OF THE POLICY**

HRM (L & D sub-division) will monitor and evaluate the implementation and compliance of the Bursary Policy.

### **14. POLICY AMENDMENT AND REVIEW**

The Bursary Policy is subject to review every three (3) years or where there is new emerging information that has a financial impact on both the employee and/ or the employer.

### **15. COMMUNICATION**

The Bursary Policy shall be communicated to all Municipal employees using the full range of communication methods available to the Municipality.

**16. COMPLIANCE**

All levels of management will be held accountable for the implementation of the Bursary Policy in their areas of responsibility. Failure to implement the Bursary Policy correctly may result in disciplinary action against the line manager(s) responsible. Individual employees also have direct legal responsibilities to follow practice.

Any employee found to have acted in contravention of the Bursary Policy, shall be guilty of an offence and disciplinary process shall follow in terms of the Collective Agreement or the Municipality's Grievance Code and Disciplinary policy.

**17. PRECEDING POLICIES RESCINDED**

The bursary policy shall supersede any current and previous bursary policy.

**18. APPROVAL**

Municipal Manager	
Signature:	
Date approved:	
Effective Date:	

APPROVED