



**BA-PHALABORWA MUNICIPALITY**  
HUMAN RESOURCES

**STAFF STUDY BURSARY**

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REVISION HISTORY

| Revision | DATE         | AUTHOR     | REASON FOR CHAGE |
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## 1. PREAMBLE

Ba-Phalaborwa municipality is committed to the structured and systematic training and development of all its employees on an ongoing basis. This will enable them to perform their duties effectively and efficiently. Staff Study Bursary and other development programs will be provided to enable employees to acquire skills, knowledge and other attributes and develop their potential to meet the municipality's future human resource needs

## 2. DEFINITIONS

In this policy unless the context otherwise indicates –

**“Academic qualification”** means theoretical or partially theoretical skills acquired from a tertiary institution and recognized as such by the National qualifications Framework.

**“Study fund”** means a sum of money in the annual budget earmarked by Council for the education and training of its employees.

**“Study bursary”** means an amount of money that the Council pays to employees from the study fund to further their studies subject to the conditions set out in this policy.

**“Council”** means the Municipality of Phalaborwa or its legal successor in title.

**“Misconduct”** means the submission of fraudulent and/or misleading information concerning the content and/or cost of registered course as well as withholding of relevant and/or submission of false information related to the studies.

**“Necessary training”** means training focused on achieving a desired standard of efficiency or behaviour that is required to do a job by means instruction and/or practice.

**“Prima facie proof”** means the original final examination results or original course certificate.

**“pro rata refund”** means the refund by the council or the employee to the Council or the employee in respect of the subjects passed or failed out of the total number of subjects registered for in a study year.

**“Qualifications”** means the skills that makes a person competent, eligible or legally suitable for the job.

**“Skills”** means that ability to do the job well especially as the result of long practical experience.

**“Statutory acknowledged qualification”** means a qualification recognized in terms of the relevant legislation of the Republic of South Africa, applicable and legally registered professional bodies and the National Qualifications Framework.

**“Tertiary institution”** means an institution recognized in terms of the relevant legislation of the Republic of South Africa to provide training and education on a tertiary level, i.e. universities, Technikons and colleges.

**“Condition of Employment”** means the condition of employment prescribed by the industrial Council for the Local Government undertaking and detailed in Government Gazette No. 16047 dated 28 October 1994

### 3. Legal Framework

The following are amongst others national laws and policies which impact on how an organization approaches education, Staff Study Bursary:

- Public Service Regulations, 2001
- South African Qualifications Authority Act, 58 of 1995.
- Labour Relations Act, 65 of 1995.
- Constitution of the RSA, 108 of 1996.
- Basic Conditions of Employment Act, 75 of 1997.
- Employment Equity Act, 55 of 1998.
- Skills Development Act, 97 of 1998.
- Skills Development Levies Act, 1998.
- White Paper on Public Service Training and Education, 1998
- Ba-Phalaborwa Municipality Leave Policy

The above-mentioned laws underpin and inform the Ba-Phalaborwa Municipality’s Education, Training and Development Policy Framework

### 4. PURPOSE AND PRINCIPLES

- 4.1. The purpose of the study bursary policy is to provide staff members who are permanently employed by the council with the opportunity to enroll for a course

or part of a course at a acknowledged tertiary institution in order to obtain a statutory acknowledged qualification.

- 4.2, Study bursary covers the payment of study fees (including registration and book fees) in respect of applications approved by the Council.
- 4.3. A study bursary is awarded to an employee out of the study fund only if the degree or diploma course pursued is **applicable** to and **reconcilable** with the activities of the Council and **relevant** to the applicant's position.
- 4.4. The study bursary fund enable employees to obtain the necessary training and academic qualifications in the functioning/activities of the municipality on an after hour basis.

## 5. ADMINISTRATIVE REQUIREMENTS

- 5.1. During the training needs analysis, any council employee who wishes to apply for study bursary must indicate the need, which shall form part of the Council's Workplace Skills Plan for that particular financial year.
- 5.2. After the Workplace Skills plan has been approved for that financial year, the Human Resources division shall advertise and invite applications for bursaries.
- 5.3. The employee will be required to complete the prescribed bursary application form with the Skills Development Facilitator, wherein the following shall be indicated:-
  - 5.1.1. The need for a bursary in accordance with the training needs analysis and The Workplace Skills Plan
  - 5.2.2. Course (s), module or papers desired for that particular year,
  - 5.3.3. The amount for the bursary applied for,
- 5.3. The application for bursary forms shall serve in the training committee which shall determine the approval and awarding of bursaries to employees pursuing diploma/degree or courses that are applicable to and reconcilable with the activities of the Council and relevant to the applicant's position.
- 5.4. After an employee has been awarded a bursary, the completed application form must be submitted to the Municipal Manager for approval.

- 5.5. Any aggrieved applicant shall have the right to written reasons for not being awarded.

## 6. CONDITIONS UNDER WHICH BURSARIES SHALL BE GRANTED

- 6.1. Before the study bursary is paid out, the employee must agree that:-
- 6.2. His/her right to claim money in respect of his/her salary, leave and any other money which will be due to him/her with the termination of service, BE CEDED to Council up to the amount of the study bursary.
- 6.3. Sign a study bursary agreement with the Council wherein the conditions of the study bursary are reaffirmed.
- 6.4. A study bursary after being approved by the Council will be paid directly to the relevant educational institution with the understanding that if employee can sufficiently furnish proof that the relevant study money or a portion thereof was paid by him/her, the said bursary or portion thereof can be paid directly to the employee.
- 6.5. The employee whose studies follow a calendar year shall be granted a study bursary for an academic year and it shall be upon him/herself to re-apply for refunding for the second academic year, which application shall not be unreasonably refused. This is in line with the Workplace skills plan which is reviewed and budgeted for on an annual basis.
- 6.6. An employee whose studies follow a semester and or trimester pattern, shall apply for the bursary studies for the total whole of semesters and or trimesters within an academic year and it shall be upon him/herself to re-apply for further funding for the second academic year as per clause 6.5. above.
- 6.7. The amount of a bursary granted to the employee in respect of any one year's study and/or completed study course shall deemed to **be repaid** to Council only if prima facie proof **is submitted** that he/she has passed all the registered subjects.
- 6.8. The employee shall, in consideration of the council's expenditure incurred in clause 6.4 above, undertake to bind him/herself to pay back by offering services to council for a period of two years after completion and acquisition of the qualification.

- 6.9. The study bursary granted, shall if the study year is failed in total or in part, **be repayable** by the employee to the Council, respectively in full or part based on the number of subjects failed. The amount so calculated will be repayable in ten even payments over a period of ten months inclusive of fifteen percent (15%) interest.
- 6.10. It shall be upon the employee him/herself to ensure that the subject/s failed as per clause 6.9. above are registered at own cost and passed before another application for staff study bursary can be handed in for consideration to continue with his/her studies.
- 6.11. The Council can at anytime withdraw the bursary if it is of the opinion that the employee is guilty of any misconduct or any principles or conditions stipulated in this policy are not adhered to.
- 6.11.1. If the Council withdraws the bursary or if the employee discontinues his/her studied before the expiry of the study period, the employee must repay the full amount of the bursary plus 15% calculated on the total cost of the bursary awarded.
- 6.11.2. When the employee retires on attainment of pensionable age, resigns, or is dismissed from the Council's service before the expiry of the study period, the indebted amount according to his/her contract is immediately payable to Council. The outstanding amount may be deducted from the employee's salary/payment of leave days or any other money due to the employee.

## 7. AWARDING OF BURSARIES

The training committee shall be the responsible body to award study bursaries to the employees subject to the availability of funds.

The awarding of bursaries shall be based on merit and employees whose studies are continuous in nature as per clause 6.5 and 6.6. above will be given first preference when awarding bursaries.

## 9. SPECIAL LEAVE FOR STUDY PURPOSES

- 9.1. Study leave on full pay shall be granted in terms of clauses as contained in the applicable Collective agreement on Conditions of service for Limpopo Division and the Ba-Phalaborwa Municipality's leave policy.

- 9.2. Council, in consultation with the South African Local Government Association, will consider applications received for study leave not provided for in this policy and the agreement on its own merits.

## **10. IMPLEMENTATION AND MONITORING**

The policy will be implemented and become effective once approved by Council.

## **11. COMMUNICATION**

The policy will be communicated to all employees using a full range of communication methods available in the municipality.

## **12. POLICY REVIEW**

The policy shall be reviewed on an annual basis and revised whenever it is necessary.

## **13. DISPUTE RESOLUTION**

Any dispute arising from the application of this policy shall be handled in terms of the grievance procedure as outlined in the SALGBC as well as the Labour Relations Act, 55 of 1995.

## **14. APPROVAL**

\_\_\_\_\_  
**APPROVED BY MUNICIPAL MANAGER**

\_\_\_\_\_  
**DATE:**

\_\_\_\_\_  
**APPROVAL BY COUNCIL**

\_\_\_\_\_  
**DATE**



**BA-PHALABORWA MUNICIPALITY**

**AGREEMENT FOR STAFF STUDY BURSARY**

Agreement for study bursary made and entered into between the **BA-PHALABORWA MUNICIPALITY** (Hereinafter mentioned as the council) and hereafter represented by **MOAKAMELA MAITE IRENE** in her capacity as Director Corporate Services due to that purpose authorized according to Council resolution  
And

.....  
**ID. NO:**.....

Referred to as an employee stationed in the department

.....  
working as (Name of position)

.....  
WHEREAS the employee applies for a Study Bursary.

**NOW THEREFORE the parties agree as follows:**

1. The Council gives herewith a bursary to the employee for part time study at an approved tertiary education.
2. The employee shall in consideration of the council’s expenditure in clause 1 above, undertake to bind him/her studies to pay back by offering services to council at a rate of two years services after acquisition of the qualification.
3. The bursary amount to R ..... and, if the study year is failed in total or part thereof, the amount is respectively payable in full or partial in respect to the subject failed, repayable in ten even payments inclusive of 15% interest.

- 4. When the employee retires, resigns or dismissed from the Council’s services before the period expires, the indebted amount according to his contract is immediately payable and does Council have first claim on any salary, payment with regard of leave or any other money that the Council owes the employee and can it be deducted from the mentioned money.
- 5. The employee herewith agrees to the jurisdiction of the Magistrate Court of Phalaborwa if any dispute arises from this agreement.
- 6. If the employee discontinues his study, or cedes the bursary, the full amount of the bursary inclusive of 15 % interest is payable – failing which council can take possession of the money as mentioned in paragraph 3 above.

**THE DONE and SIGNED** by the **EMPLOYEE** at **PHALABORWA**, this  
 ..... day of ..... 20.....

**AS WITNESSES:**

- 1. ....
- 2. ....

.....  
**EMPLOYEE** .....  
**DATE**

**Thus done and SIGNED** by the **COUNCIL** at **PHALABORWA**, this  
 ..... day of ..... 20.....

**AS WITNESSES**

- 1. ....
- 2. ....

\_\_\_\_\_  
**DIRECTOR: CORPORATE SERVICES**



**BA-PHALABORWA MUNICIPALITY**

**APPLICATION FOR STUDY BURSARY FOR COUNCIL EMPLOYEES**

- 1. NAME OF APPLICANT.....
- 2. IDENTITY NUMBER.....
- 3. DEPARTMENT.....
- 4. POSITION.....
- 5. INTENDED STUD FIELD.....
- 6. SUBJECTS.....  
.....  
.....

7. AMOUNT OF BURSARY.....

8. HAVE YOU APPLIED FOR A BURSARY BEFORE?

 YES NO

IF YES, FOR WHICH FIELD OF STUDY?

.....

9. WHAT SUBJECTS DID YOU REGISTER FOR:

.....

.....

10. HAVE YOU COMPLETED THE STUDIES IN TERMS OF THE PREVIOUS BURSARY:

.....

IF NOT, WHAT ARE THE SUBJECTS NOT ACHIEVED:

.....

.....



4. **MUNICIPAL MANAGER**

Study bursary

APPROVED

DISAPPROVED

Remarks: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_  
**MUNICIPAL MANAGER**

\_\_\_\_\_  
**DATE**