
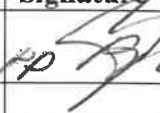






## OFFICE OF THE PREMIER

### ROUTE FORM

<b>Ref No. : S5.2.1</b>			
<b>Subject</b>		<b>RE: BURSARY POLICY 2018 REVIEW</b>	
<b>Compiled by:</b>	Ms Motabogi	<b>Tel/Ext</b>	053- 838-2427
<b>Rank</b>	Admin Clerk		
<b>Directorate</b>	Capacity Development		
<b>Compiler's Signature</b>		<b>Date:</b> 05/03/2018	
	<b>Name/Designation</b>	<b>Received/Signature</b>	<b>Date</b>
<b>Routed to</b>	Ms M. Pienaar Director: PMCD		5/3/18
<b>Purpose/Comments</b>	<b>For Noting</b>		
<b>Routed to</b>	Ms M. Tlaetsi Chief Director: SHCD		6/03/2018
<b>Purpose/Comments</b>	<b>For Noting</b>		
<b>Routed to</b>	Ms G. Matlaopane DDG: Institutional Development		6/3/2018
<b>Purpose/Comments</b>	<b>For Noting</b>		
<b>Routed to</b>	Mr. J. Bekebeke Director General		
<b>Purpose/Comments</b>	<b>For Signature</b>		
<b>Routed to</b>			
<b>Purpose/Comments</b>			

**Final Return to:**

Mr J. Modise



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Date :  
Leshupelo: **05.03.2018**  
Umhla :  
Datum :

Reference :  
Tshupelo : **S.5.2.1**  
Isalathiso :  
Verwysings:

**To : The Director-General  
Office of the Premier**

Dear Sir,

**RE: Review of the bursary Policy 2018**

The Departmental Training Committee (DTC) has reviewed the Bursary Policy for 2018 as per the requirements of the Policy. The changes / amendments identified have been incorporated in the Policy.

Attached herewith please find the Bursary Policy for your signature.

Thanking you in anticipation.

**Ms M. Tlaletsi**

**Chief Director: Strategic Human Capital Development**

# OFFICE OF THE PREMIER



# BURSARY POLICY

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**Responsible unit: HRD**

**Contact Details of Responsible Person: DD Training (053) 838 2419**

**Date Policy: 01 April 2018**

**Version Number of Policy: 4**

## ACRONYMS AND GLOSSARY TERMS

### Acronyms

ACRONYM	DEFINITION
DG	Director - General
DPSA	Department of Public Service and Administration
HEI	Higher Education Institution
HRD	Human Resource Development
DTC	Departmental Training Committee
NQF	National Qualifications Framework
OTP	Office of the Premier
RPL	Recognition of Prior Learning
SDF	Skills Development Facilitator
SMS	Senior Management Service
WSP	Workplace Skills Plan
ABET	Adult Basic Education and Training

### Glossary of terms

TERM	DEFINITION
Academic	Refers to a theoretical studies and the obtaining of an accredited qualification (degree/diploma/certificate) obtained from recognised Higher Education Institutions (HEIs) (university/college/academy) in line with the National Qualifications Framework (NQF)
Accreditation	The periodical certification of a person, a body or an institution as having the capacity to fulfil a particular function in the quality assurance system set up by the South African Qualifications Authority Act, of 1995 and in terms of the Education and Training Quality Assurance body.
Applicant	Any employee who has applied for a bursary in terms of this

TERM	DEFINITION
	policy.
Breach of contract	Failure to carry out the obligations of the Bursary Contract in terms of this policy.
Bursar	An employee who has been granted an approved bursary by OTP.
Bursary	A bursary is the amount of money that is paid by OTP towards part time studies at tertiary institutions see item 2. The bursary is for a course that shall not be less than one year.
Contract	An agreement entered into between the bursar and OTP describing the conditions, obligations and benefits thereof.
Designated groups	Refers to Blacks (African, coloureds and Indians); women and people with disabilities as defined by the Employment Equity Act, 1998.
Permanent Employee	An employee appointed in terms of section 8 (1) (c) of the Public Service Act of 1994 and whose probation has been confirmed.
Employer	Refers to the Public Administration Leadership and Management Academy (OTP)
Pre-tertiary qualification	Study at school levels of grade 10, 11 and 12
New entrants to the Public Service	An employee newly appointed in terms of section 8 (1) (c) of the Public Service Act of 1994 whose appointment requires a mandatory probation period and an employee appointed in terms of section 8 (1) (c) of the Public Service Act of 1994 after a break in service and whose appointment requires a mandatory probation period.

## **1. PREAMBLE**

The HRD strategy for South Africa (HRDSA) 2010 -2030 was developed as an instrument that would lay a foundation for building a competent, efficient and effective Public Service, workforce, youth and the unemployed.

The National Development Plan, Vision 2030 envisages a capable and developmental state that is geared towards a proactive approach to resolving challenges. The objectives of the strategy is amongst others to promote and support the National Skills Development Agenda, to ensure a continuous supply of specialist skills and promote their absorption in the Public Service, Transform Public Service by building a competent, efficient and effective Public Service and address the National Skills challenges at all Public Service delivery points within the developmental state.

The Office of the Premier (OTP) is committed to invest in the on-going training and development of all staff in line with its strategic objectives, other government policies and the HRDSA 2030. The overall aim is to develop the capacity of employees to meet and exceed expectations and to achieve their full potential to the benefit of themselves and the department.

In line with this policy, Office of the Premier strives to ensure that learning is embedded into the organization, and further supports the on-going development of staff through the provision of opportunities to gain new skills and knowledge in the workplace and through experiential learning. The bursary scheme is one of the means by which staff can work towards acquiring new skills, knowledge and competencies.

The bursary scheme applies to relevant fields of study or development that, if successfully completed, will lead to the award of a recognized educational or professional qualification (e.g. Degree, Diploma and certification). The fields of study to be pursued, the number of bursaries to be awarded and the value of bursaries are determined annually taking the changing circumstances, the availability of funds and the needs of the department into account.

## **2. POLICY STATEMENT AND APPLICATION SCOPE**

### **2.1 POLICY STATEMENT**

- a) To ensure consistent, fair and effective awarding and monitoring of bursaries allocated to OTP employees.
- b) Bursaries in the Office of the Premier will be awarded to employees studying towards:
  - I. An accredited qualification at a South African tertiary or education institution;
  - II. An accredited qualification at a South African tertiary or education through the E – learning methodology;
  - III. The awarding of bursaries will target employees who wish to obtain credit bearing qualifications listed below:
    - Under-Graduate qualifications
    - Certificate ( NQF aligned courses )
    - Diploma ( NQF aligned qualification )
    - Post-Graduate qualifications
    - ABET and Pre-tertiary qualification)

#### **2.1.1 Policy Objectives**

- 2.1.1.1. To encourage on-going formal learning;
- 2.1.1.2. To provide financial and non-financial support to employees who intend pursuing formal learning at accredited tertiary/ education institutions;
- 2.1.1.3. To address the knowledge and skills gaps in the organisation;
- 2.1.1.4. To address the challenge of scarce and critical skills identified in the Office of the Premier HR Plan by offering financial assistance in identified fields of study;
- 2.1.1.5. To address the imbalances of the past in line with the Employment Equity Act, no 55 of 1988;
- 2.1.1.6. To attract and retain an excellent performing cadre of personnel that will keep up to speed with changing environment in the global village; and
- 2.1.1.7. To promote development and career management, performance management and good employer/employee relationships.

## **2.2. SCOPE OF APPLICATION**

This policy applies to permanently employed employees in the Office of the Premier and new entrants to the Public Service whose probation has been confirmed.

## **2.3. LEGISLATIVE MANDATE**

- MPSA Directives
- Employment Equity Act, (Act 55 of 1998)
- National Human Resource Development Strategy
- National Qualifications Framework
- PSCBC Resolutions & MPSA Determinations
- Public Service Regulation , 2016.
- Promotion of Access to Information Act (2000)
- Skills Development Act, 1998 (Act 97 of 1998)
- Skills Development Levies Act, 1999 (Act 9 of 1999)
- South African Qualifications Act (SAQA), 1995 (Act 58 of 1995)
- National Development Plan, Vision 2030

## **2.4 PRINCIPLES**

The following key principles underpinning efficient and effective management of the OTP Bursary Scheme should be pursued:

### **2.4.1 Skills driven**

The Department's bursary scheme will be focused on the skills needs of the department in relation to the Departmental HR Plan.

### **2.4.2 Redress**

The allocation of bursaries will redress the imbalances of the past in line with government transformation strategy.

### **2.4.3 Accountability**

Bursars must be committed to their studies and abide by the terms and conditions governing their bursary contractual agreement with the department.

### **2.4.4 Fairness**

All bursary matters arising from the partnership will be handled fairly according to the specifications in the contract by all parties.

### **2.5.5 Value for money**



### **3 IMPLEMENTATION PLAN**

#### **3.1 IMPLEMENTATION Procedures**

3.1.1. The invitation for the application for bursaries will be sent out by the Directorate: HRD on or before the 30 September, in order to give potential candidates reasonable opportunity to submit their applications. Completed application forms must be returned to the sub-directorate: HRD / bursary committee secretariat not later than 30 October each year.

3.1.2. Bursary application forms are obtainable from the directorate: HRD (Appendix A);

3.1.3. The Bursary application forms consist of sections 1 to 2 to be fully completed by the applicant to provide information for the Training / Bursary Committee discussions, and decision, (note that all applications will be kept anonymous prior to submission to the committee in reviewing each application equitably). Applications will be assigned reference numbers to conceal the applicant's name. Applicants should attach copies of any course information from education/tertiary institutions e.g. previous courses passed and proof of enrolment or registration;

3.1.4. Prior to completion of the application form, a discussion should take place between the employee and the line manager. Following the discussion the line manager should complete and sign section D of the form;

3.1.5. Incomplete applications or those that do not contain sufficient information will not be considered. The fully completed form should be submitted to the directorate: HRD. Late applications will NOT be considered or accepted; it is the responsibility of the applicant to ensure that the application is received in time by the directorate: HRD;

3.1.6. All applications will be collated by the bursary secretariat: who will prepare the report for consideration by the DTC;

3.1.7. All applications will be considered for recommendation by the DTC against the set criteria, as mentioned under paragraph 4;

3.1.8. The recommendations by the DTC will be submitted to the Director – General for approval. No appeal system exists. Applicants have the right to invoke the Grievance Procedure should they feel that they have been treated unfairly;

3.1.9. Applicants will be informed in writing of the decision made and, if application is unsuccessful, reasons must be provided. Where the application is successful, both the applicant and the line manager will be informed of the amount awarded.

3.1.10. On receipt of the award letter, the applicant should enter into a Bursary Contractual Agreement with OTP within 5 working days of receipt of the letter, as failure to do so will result in the award being withdrawn and re-allocated to another applicant (Appendix B);

3.1.11. Declining of a bursary should be communicated in writing to the chairperson of the DTC/Bursary committee;

3.1.12. At the end of each semester (January and July each academic year), each employee in receipt of a bursary award must submit an examination report to the directorate: HRD.

3.1.13. Bursars will redeem the bursary after successful completion of the studies.

## **3.2 AWARDING OF BURSARIES**

- 3.2.1. Bursaries are granted in terms of core competencies, scarce and critical skills needs identified in the OTP's approved HR Plan subject to the available budget.
- 3.2.2. Educational/tertiary institutions specify the minimum study period/course duration required to obtain a qualification eg. a three (3) year diploma or four (4) year degree. This stipulated minimum study period specified by an institution, will only be extended by a maximum of two years for a bursar to obtain a qualification. Thus a three year qualification must be completed within 5 years, a 4 year qualification within 6 years and so forth.
- 3.2.3. In the event the bursar fails to complete the qualification within the period as stipulated in 3.1.2 above, the bursary will be cancelled and the bursar shall be obliged to repay the full bursary amount and any interest that may be due.
- 3.2.4 Public Service Regulation, 2016, Empower the head of department to grant financial or other assistance for further education and training to all serving employees including those on probation.

## **3.3. BURSARY CONDITIONS/PROVISIONS**

### **3.3.1 General Bursary Conditions**

- a) No application fees shall be covered by the employer;
- b) Monies due to a bursar or an educational/tertiary institution i.e. registration, tuition and examination will be paid directly to the institutions after receipt of specified accounts from the applicant.
- c) Bursary amounts or part time studies will cover registration and tuition fees.
- d) Only applications for bursaries in terms of permanent employees whose probation has been confirmed will be considered.
- e) Assistance towards prescribe books to be considered by the DTC for recommendation to the accounting officer , subjected to the submission of motivation by the applicant. Such motivation be submitted immediately after registration at an education / tertiary institution.
- f) Bursaries will be granted to designated groups in line with the Departmental Employment Equity policy.
- g) Preference will be given to Non- SMS members. Eighty percent (80%) of the bursaries will be allocated to employees below SMS and twenty (20%) to SMS members.
- h) Should the bursar resign from the public service, while he/she is studying, he/she shall be obliged to pay the full cost of the bursary and any interest due;
- i) Should the bursar, who has completed their qualification, resign from the public service, while he/she is still serving the terms & conditions of the bursary contract, he/she shall be obliged to pay fifty per cent (50%) of the total bursary cost allocated to him/her;

### **3.3.2. Take-over if employee transferred from other departments**

- OTP may take over bursaries in the study fields applicable to the OTP approved HR Plan;
- The taking over of the study debts will be made in terms of the guidelines of the Public Finance Management Act (PFMA), Act 1 of 1999.
- No financial settlements should take place between the Departments (as listed in Schedules 1 and 2 of the Public Service Act, 1994), when employees with obligations towards a particular department are transferred.
- After approval, OTP will cover 100% of the take-over from registered institutions for that specific academic year, excluding interest; and
- Proof of debt and progress report should be submitted.

### **3.3.3. Redeeming Of Bursary**

- a) The bursar is contractually bound to serve the Northern Cape Provincial Administration or any other public sector institution for minimum of 2 years after completion of qualification.
- b) In the event that the bursar leaves the public sector for the private sector he/she will be obliged to pay all the costs incurred relating to the bursary and any interest due. All bursars will be captured on Persal to monitor the implementation of the 2 year obligation period.
- c) Should the bursar, who has completed their qualification, resign from the public service, while he/she is still serving the terms & conditions of the bursary contract, he/she shall be obliged to pay fifty per cent (50%) of the total bursary cost allocated to him/her;

### **3.3.4. Abandonment of Study**

- a) In the event the bursar fails to continue immediately with his/her studies in the next academic year, the bursar will be deemed to have abandoned the studies. Abandonment of study constitutes a breach of contract.
- b) In the event of abandonment of studies, bursars shall be held accountable for repaying all bursary costs incurred in terms of the bursary contract including any interest due.
- c) Should special circumstances exist that cause a bursar to abandon the studies, the bursar is required to immediately provide the HRD Unit with valid reasons and evidence to this effect.
- d) The reasons and evidence will be submitted to the DTC for consideration and decision.

- e) After consideration of the reasons and evidence the DTC may hold the bursar accountable for repaying all bursary costs incurred in terms of the bursary contract including any interest due.

### **3.3.5. Repeated Courses and Supplementary Examinations**

- a) Any failed or uncompleted subject(s) will not be paid for by OTP and will be the responsibility of the bursar to repeat such module(s) at own cost;
- b) OTP will not pay for any subject(s) changes as a result of such repetition;
- c) The costs incurred for supplementary examination purposes will be at the bursar's own cost.

### **3.3.6. Change of Study Direction**

- a) A change in study direction will only be considered in exceptional cases motivated and recommended by the Branch/Unit Head and approved by the Chairperson of the DTC/Bursary Committee provided that the new field is in line with OTP's Strategic priorities;
- b) OTP will cancel the bursary contract in cases where the bursar changes the study field without prior approval and the bursar will be obliged to repay with interest the money owed to OTP; and
- c) In cases where a bursar is granted permission to change study direction:
  - ✓ The OTP will pay the costs equivalent to the initial approved bursary, and the employee shall be liable for the difference in cost if any;
  - ✓ The bursar will sign a new bursary agreement considering the prescribed academic period of the new study direction plus the number of years already sponsored by OTP.

### **3.3.7. Withdrawal from Study by the Employer**

- a) OTP may at any time withdraw the contract if:
  - ✓ The bursar fails to register in the year for which the bursary is awarded;
  - ✓ If the bursar changes study field, without prior approval;
  - ✓ A bursar is found guilty and dismissed due to misconduct as identified by the employer;
  - ✓ Where there is a breach of Contractual Agreement
- b) In the event that a bursary granted for studies is withdrawn, the bursar shall be liable for repaying OTP all cost incurred for outstanding modules already paid for by OTP, with interest.

### **3.3.8. Bridging Courses**

The bursary scheme may make provision for the funding of a bridging course should a bursar is required to do so.

### **3.3.9. On Job Assignments/Research**

- a) Bursars requested by institutions to submit assignments/thesis/ research work regarding a topic related to the core function of OTP are required to request approval from the Director-General.
- b) Will utilize their time to do an assignment.

## **4. Financial Implications**

- 4.1. Preference will be given to the identified scarce and critical skills as per the HR Plan and Non-SMS members;
- 4.2. The budget for the bursary funding will be centralised in the Directorate: HRD;
- 4.3. The awarding of bursaries within OTP will depend on the availability of funds;

## **5.Compliance, Monitoring and Evaluation**

The department training committee will ensure compliance with the policy.

## **6.Policy Impact**

The impact of the policy will be measured by the success rate of bursar's as well as improvement in the quality of work of bursar's.

## **7.Policy review**

The policy will be reviewed every two-years, or as necessary or as necessitated by legislation.

## **8.Adaption of Policy**

The policy will be adopted after all consultative process have been conducted/exhausted.

## **9.POLICY EFFECTIVE IMPLEMENTATION DATE**

Unless specifically expressed in the document, the policy should be deemed to take effect on the day it is approved and signed by the Director – General.


## **10.VALIDITY OF POLICY DOCUMENT.**

In an event of any doubt about authenticity of this policy document, the document signed by the Director – General should be considered as the only document with validity, authority and a force of law.

## 12. APPENDICES

Appendix A	Application form for bursary for part time studies
Appendix B	Bursary contractual Agreement: OTP employees

## 13. APPROVAL

<b>Policy Version: 4</b>		
<b>Compiled by: PM &amp; CD</b>		<b>Implementation date: 01/04/2018</b>
<b>Approval</b>		
<b>Director-General</b>	<i>Justice Bekubeka</i>	 <i>7/3/18</i>
<b>Rank</b>	<b>Name</b>	<b>Signature</b>