

# LESEDI MUNICIPALITY



## **BURSARY POLICY FOR LESEDI MUNICIPAL EMPLOYEES 2019-20**

**APPROVAL DATE BY COUNCIL: 30 MAY 2019**  
**COUNCIL RESOLUTION NUMBER: LC.MC-87/05/2019**

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## 1. DEFINITIONS

The following definitions and principles will apply to the Council's Bursary Policy:

- **Career path** is the plan mutually agreed upon between the employee and relevant Executive Manager, or the Manager's nominated representative, in terms of which the employee's skills, knowledge and/or academic qualifications will be improved within a specified period of time in order for the employee to function effectively and efficiently in the working environment. The employee's progress will be evaluated in terms of mutually agreed upon levels of productivity, proficiency and performance within the specified time periods. Academic studies must be dealt with in terms of the Bursary Policy.
- **Employee development courses** are voluntary programmes that develop the employee's general skills and knowledge, through bursaries.
- **Learnership contracts** are contracts entered into between (a) a learner, (b) the Lesedi Municipality and (c) a training provider accredited by SAQA, where the training provider provides academic and skills training and the Lesedi Municipality provides practical experience that can lead towards a qualification registered by SAQA.
- **SAQA Act:** the South African Qualifications Authority Act, 1995 (No. 8 of 1995) – as amended
- **LGSETA:** the Local Government Sector Education and Training Authority
- **Skills Development Act:** the Skills Development Act, 1998 (No. 97 of 1998) - as amended
- **Skills Development Levies Act:** the Skills Development Levies Act, 1999 (No. 9 of 1999) - as amended
- **Council** means the Lesedi Local Municipality (LLM) and includes Councillors or any officer employed by the Council, acting by virtue of any power vested in the Council.
- **Employee** means any person, excluding an independent contractor, appointed by the LLM and who receives, or is entitled to receive any remuneration.
- **Registered Educational Institution** means a University, Technikon, College and/or any other tertiary institution.
- **Institution** educational institution registered with the Department of Education.
- **Approved Qualification** means a degree, diploma, certificate or equivalent accredited with South African Qualification Authority (SAQA) in an approved field of study as reflected on Council's list of approved study courses, PROVIDED it is presented at a Registered Educational Institution.

- **Approved Field** means a field of study that shall have a bearing upon and be applicable to the activities of local government as determined by Council.
- **Academic period** means the duration of a course for a degree, diploma or certificate or any portion thereof consisting of a specific number of subjects or modules to be completed within a fixed period as determined by the educational institution (Provided that the period is not shorter than 3 months).
- **Study Bursary** means the bursary granted to an employee for study purposes.

## **2. OBJECTIVES**

The objective of the Bursary Policy is to encourage employees to engage in or to continue their studies in order to:

2.1 develop the relevant skills and level of academic achievement of the Lesedi Municipality workforce

2.1.1 to improve the quality of life of workers, their career prospects and labour mobility, and

2.1.2 to improve productivity in the Lesedi Municipality;

2.2 increase the levels of investment in education and training in the Lesedi Municipality, and that the return on that investment be improved;

2.3 Encourage Executive Managers –

2.3.1 to facilitate active learning in the workplace, and

2.3.2 to provide employees with opportunities to acquire new skills and knowledge in the relevant field of work related to local government.

2.4 encourage employees to participate in training programmes;

2.5 improve the advancement of previously disadvantaged employees;

2.6 meet the objectives determined by career paths;

2.7 establish a pool of suitable candidates in order to support, inter alia, the Succession Planning.

## **3. ELIGIBILITY FOR BURSARY**

3.1 Every permanent employee, Municipal Manager and manager directly accountable to the Municipal Manager shall be eligible for Bursary subject to the provisions of this policy.

3.2 Priority shall be given to employees from designated groups in order to enhance skills development in terms of employment equity measures provided for in LLM's Employment Equity Plan/Policy

3.3 The period of the course shall not be shorter than three months or longer than that recommended or stipulated in the rules, regulations or yearbook of the educational institution.

#### **4. BURSARY FOR CAREER PATHING/PROGRESSION**

Bursary will be provided, to the mutual benefit of the Lesedi Municipality and the employee, based on qualifications accredited by SAQA, where they are:

4.1 directly related to the employee's present career;

4.2 directly related to the employee's approved and mutually agreed upon career path;

4.3 directly related to the requirements of an approved progression policy applicable to the employee's present career;

4.4 necessary for the furtherance of the employee's career within his/her present unit/department, i.e. where there is a clear and logical academic path to a relevant higher post on the approved staff structure of the employee's present Business Unit.

#### **5. BURSARY FOR EMPLOYEE DEVELOPMENT**

In instances where the employee's proposed field of study, will enable him/her to change his/her career in the service of the Lesedi Municipality, the following procedure will be followed:

5.1 The employee submits a written application for study as per the procedure detailed in paragraph 11. The Executive Manager must identify whether the proposed study would be of benefit to the Lesedi Municipality

5.2 In order to determine the eligibility of the proposed course of study, a panel consisting of the Executive Manager: Corporate Services and Legal (convener), Skills Development Forum Representative, and the Skills Development Officer, will consider the application. It is recommended that the relevant Executive Manager, or his/her nominee, be part of the proposed panel mentioned in the above paragraph. A representative from each Labour Union shall be represented in the Bursary Committee.

5.3 The panel mentioned in 5.2 above will submit its recommendations in the form of a report to the Municipal Manager for a decision on the eligibility of the proposed course.

5.4 Should the employee be dissatisfied with the panel's decision, he/she may pursue the matter by means of the Lesedi Municipality official Grievance Procedure.

5.5 The completion of courses obtained through the Bursary Policy is not linked to salary adjustment/s awards, or any other monetary compensation other than that refund where necessary to which the employee may be entitled to on successful completion of the course.

#### **6. TRAINING PROVIDERS**

Bursary will be granted only in respect of studies at institutions accredited by a body contemplated in Section 5(1)(a) (f) (bb) of the South African Qualification Authority Act.

## **7. FINANCIAL ASSISTANCE**

7.1 The Lesedi Municipality shall assist employees with the payment of registration, tuition and examination fees upon receipt of written proof that the employee has successfully passed his/her studies for a particular academic year, this amount will be capped at R20 000 per annum. Further to this, this amount shall be reviewed in a three-year cycle in accordance with inflation and this adjustment must be presented to Council for approval.

7.2 Should an employee's fees be more than the R20 000 covered the onus is on the employee to pay all outstanding amounts from their own pocket.

7.2 Should an employee fail some of the courses in any given year, he/she will be responsible for the payment of such repeated course/s; Lesedi Municipality will only pay for the subject passed.

7.3 Bursary is available until the completion of the course.

## **8. STUDY AND EXAMINATION LEAVE**

The Council shall grant the employee the study leave in accordance to the South Local Government Bargaining Council's Collective Agreement on Conditions of Service.

## **9. CONTRACTUAL LIABILITY IN TERMS OF FINANCIAL ASSISTANCE**

9.1 The employee shall be required to enter into an agreement (**Annexure B**) with the Lesedi Municipality for admission to the Bursary Policy and to remain in the service of the Lesedi Municipality for a period equal to which the Bursary was granted. The service requirement shall run concurrently with any year of study, e.g. If the employee has received Bursary for a period of 3 years, the second year of study shall be deemed to be the fulfilment of the service requirement pertaining to the 1st year of Bursary.

9.2 On termination of service prior to having satisfied the requirements in 9.1, the employee shall refund the Lesedi Municipality all the outstanding financial commitments incurred in respect of his/her contract, on a pro-rata basis.

9.3 Clause 9.2 is not applicable in instances of death, ill-health, incapacity or council retrenchment.

## **10. STUDIES THAT ARE UNDERTAKEN DURING WORKING HOURS FOR PART OF THE DAY OR THE FULL WORKING DAY**

10.1 Proof required. The employee must submit written proof that will be sufficient and acceptable to his/her Executive Manager that study in the specific field is not available on a part-time basis after working hours, or through distance tuition from any institution in South Africa subject to approval by the Municipal Manager.

## **11. NEW EMPLOYEES STUDYING TOWARDS AN APPROVED QUALIFICATION**

11.1 Newly appointed employees studying towards an approved qualification will only be given bursaries for courses or studies that they enrol for only when they are in the service of Council.

11.2 No study costs will be taken over from the previous employer of a person newly appointed within the LLM staff structure.

## **12. SUBMISSION OF THE RESULTS**

An employee must submit proof of the examination results to the satisfaction of the Council, within one (1) month after the results have been made available by the educational institution.

## **13 PROCEDURE FOR BURSARY**

Bursary shall be considered for employees who wish to undertake a programme on the approved schedule of study programmes. Applications for prior Bursary shall be handled in terms of the following procedure (see **Annexure A**: Bursary Application form).

13.1 The employee must submit a written request for Bursary at least three months prior to the start of the programme. An application on the prescribed form detailing the following must be submitted to the Executive Manager:

- the specific subjects and study programme that the employee wishes to study;
- the registration, tuition and examination fees in respect of each subject;
- written proof of (a) must accompany the application:
- the name and address of the educational provider;
- whether the studies will be undertaken part-time, after hours or whether the student will be required to attend lectures, etc. during working hours. In the latter instance, the actual times and duration of lectures for training hours/sessions must be stated, i.e. a study roster should be lodged and approved.

13.2 The panel as contemplated in clause 5.2 will assess the application.

13.3 The Executive Manager: Corporate Services will inform the employee in writing of the decision reached in terms of paragraph 5.3.

## **14. PROCEDURE REGARDING APPLICATION FOR RETROSPECTIVE BURSARY**

Retrospective Bursary is rendered in respect of studies commenced without obtaining prior approval from the panel (see clause 5.2) and shall be defined as follows:

14.1 The employee has enrolled/registered for the study without obtaining the approval, and has not paid any amount to the educational provider; or

14.2 The employee has enrolled/registered for the study without obtaining the approval and has paid the registration fees etc. partially or in full; or

14.3 The employee is a new appointee, who was already participating in studies at the time of his/her appointment.

14.4 The employee carries the risk of committing to and/or engaging in a study without first finding out whether financial assistance will be granted by Council.

14.5 Where retrospective applications are approved, the employee will be refunded with the full costs pertaining to the registration, tuition and examination fees of each subject successfully completed after the approval date and on submission to the Executive Manager of the official examination results issued by the educational provider.

14.6 The employee must submit a written request for Bursary, detailing;

- the specific subjects and study programme that the employee wishes to undertake;
- the registration, tuition and examination fees in respect of each subject;
- written proof of 12.1 must accompany the application;
- the name and address of the educational provider;
- whether the studies will be undertaken part-time, after hours or whether the student will be required to attend lectures etc. during working hours. In the latter instance, the actual times and duration of lecture/training hours/sessions must be stated, i.e. a study roster should be lodged and approved. (clause 5.2)

14.7 The Executive Manager will assess the application and determine whether the studies qualify for Bursary, as detailed under clause 4, or whether the conditions detailed in clause 5 apply.

14.8 The Executive Manager will consult with the Executive Manager: Corporate Services in respect of these applications.

14.9 The Executive Manager will inform the employee in writing of the decision reached in terms of the application.

14.10 Where the Executive Manager does not approve the application, the conditions detailed in clause 5 will apply.

14.11 In Instances where the employee has successfully completed his/her course of study, the relevant Executive Manager shall advise the Chief Financial Officer in writing to refund the employee with the full costs of the subjects passed. The employee's examination results must be attached thereto.

## **15. IMPLEMENTATION AND MONITORING**

This policy will be implemented and effective once recommended by the Local Labour Forum and approved by Council.

## **16. COMMUNICATION**

This policy will be communicated to all Municipal employees using the full range of communication methods available to the municipality.

## **17. POLICY REVIEW**

This policy will be reviewed annually and revised as necessary.



## **18. BUDGET AND RESOURCES**

The financial and resource implication/s related to the implementation of this policy should be qualified and quantified.

## **19. ROLES AND RESPONSIBILITIES**

The Municipal Manager or his/her delegated assignee accepts overall responsibility for the implementation and monitoring of the policy.

## **20. DISPUTE RESOLUTION**

Any dispute arising from this policy due to ambiguous wording or phrasing must be referred to the Senior Management Team (SMT) of the municipality for adjudication.

### **AUTHORITY**

Formulated by: \_\_\_\_\_ Date: \_\_\_\_\_

Consulted: LLF: \_\_\_\_\_ Date: \_\_\_\_\_

Section 80 Approval: \_\_\_\_\_ Date: \_\_\_\_\_

Council Approval: \_\_\_\_\_ Date: \_\_\_\_\_

**ANNEXURE "A"**

**APPLICATION FOR A BURSARY (OFFICIAL OF COUNCIL)**

All applications must be submitted to the Head of Department of the Applicant, Who in turn will submit it to Municipal Manager. A copy of your LATEST PAY SLIP must be attached to this application.

**1. PERSONAL PARTICULARS**

Name: .....

Job Title: .....

Dept: ..... Employee 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 FOR CONSIDERATION BY THE BURSARY COMMITTEE**

APPROVED / NOT APPROVED / APPROVED, SUBJECT TO THE FOLLOWING CONDITIONS:

.....  
.....

DATE :.....

SIGNATURE :.....

**ANNEXURE "B"**

**MEMORANDUM OF AGREEMENT**

ENTERED INTO BY AND BETWEEN:-

**LESEDI LOCAL MUNICIPALITY**

(duly represented hereinafter by **[Municipal Manager]** in his capacity as [Municipal Manager], authorized thereto by virtue of a Council Resolution of the [ ] Municipality.

(Hereinafter referred to as "the Municipality")

**And**

Name: .....

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 domicilium citandi et executandi, for the purposes of this Agreement, to the following address:

**Official’s address:**

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

THUS DONE AND SIGNED at ..... on this ..... day of ....., 20....

.....

OFFICIAL’S NAME

.....

SIGNATURE

**WITNESSES:-**

1. NAME: .....

SIGNATURE .....

2. NAME: .....

SIGNATURE: .....

**For the Municipality**

**MUNICIPALITY'S ADDRESS:**

.....

.....

.....

THUS DONE AND SIGNED at ..... on this ..... day of  
....., 20..... .

.....

MUNICIPAL MANAGER'S NAME

.....

SIGNATURE

**WITNESSES:-**

1. NAME : .....

SIGNATURE .....

2. NAME: .....

SIGNATURE: .....