

# **MORETELE LOCAL MUNICIPALITY**



## **BURSARY POLICY FOR EMPLOYEES & COUNCILLORS APPROVALS**

**FINANCIAL YEAR 2023-2024**

## 1. INTRODUCTION

Moretele Local Municipality acknowledges that South Africa is presently experiencing political, economic and social change in which human resource capacity plays a pivotal role in the upliftment of the society. This gives rise to a “change event network” which affects the community’s ability to adapt with technological, political, economical and social development. The changing environment requires the municipality to confront and adapt to change in order to continue with the delivery of quality services in an efficient and effective manner.

Moretele Local Municipality must develop effective mechanisms for dealing with change. One of these mechanisms is training and development, which is aimed at developing the skills, knowledge and attitudes needed by the municipal employees to cope with the changing work environment and continuous change in the communities they come from.

The municipality also acknowledges: -

- 1.1 The provision of Section 68 of Municipal Systems Act, which stipulates that the municipality must develop its human resource capacity to a level that enables it to perform the functions and exercise its powers in an economically effective and accountable way;
- 1.2 That capacity building, social and economic development cannot be separated from training;
- 1.3 That it is entitled to provide financial assistance to its employees for training and development in a manner that is sustainable, affordable and equitable.

This policy is developed in consideration of the definition of human resource development which is “the integrated use of training and development, organizational development and career development to improve individuals, group and organizational effectiveness”

## 2. DEFINITIONS

In this policy, unless the context indicates otherwise.

### **“Employee”**

As defined by the Labour Relations Act, any person appointed in the services of the municipality and includes those appointed as fixed term contract employees. The term “employee” will include Councillors.

**“Employer”** means Moretele Local Municipality

**“Conditional Donation”** means when the student is required to refund a bursary under certain circumstances included herein

**“Council”** means the Moretele Local Municipality Council

**“Course duration”** means the number of years allowed for completion of the course as provided for in the rules and regulations of the institution or stipulated in any law of the Republic of South Africa

**“Bursary”** means money given to an employee to help him/her pay for his/her studies

**“Institution”** means a University / Technikon or FET institution registered and approved by South African Qualifications Authority (SAQA)

**“Examination”** a final testing of the proficiency of knowledge of a student (oral or written) in a particular subject/module prescribed by the institution, towards the completion of a module or subject.

**“Qualifications”** means a Certificate, Diploma, Junior Degree, Honours/  
Masters and or Doctorate Degrees

**Commented [PM1]:** Exclude the following qualifications from the bursary policy

**“JIPSA”** Means a Government Policy on Joint Initiative on Priority Skills Acquisition

**“Neighbouring Institution”** means institutions within the North West Province and Gauteng Province.

### **3. OBJECTIVES OF BURSARY POLICY**

The main objective is to create opportunities for employees to acquire the relevant qualifications so as to satisfy the human resource requirements of the municipality as well as the career development needs of the employees. To empower the employees with advanced skills to make meaningful contributions towards the upliftment of their communities in line with the Local Growth and Development Strategy and JIPSA.

The sub-objectives include the following:

- 3.1 To prepare employees for municipal development interventions;
- 3.2 To limit staff layoff and enhance staff retention
- 3.3 To maximize the ability of the municipality to provide quality and sustainable services to the community.

### **4. COMPLIANCE WITH JIPSA**

The awarding of a bursary also has to address the scarce skills in line with the JIPSA targets in the following areas relevant to municipalities namely:

- 4.1. Engineering studies for projects on towns and cities development needed by municipalities;
- 4.2. Management and planning skills in environment, finance, local economic development and public administration.

### **5. COMPLIANCE WITH LOCAL GROWTH AND DEVELOPMENT STRATEGY**

- 5.1 The awarding of a bursary must holistically be able to address overall strategic objectives of the Local namely:

5.1.2. Qualifications funded must be able capacitate an employee to meaningfully participate towards the economic growth of the district.

5.1.3. Must provide the employee with opportunity to acquire and develop an institutional capacity, technology and skills that will facilitate rapid economic growth within the district.

**Commented [FM2]:** District or municipality

## 6. BURSARY FUND

6.1. The Council may approve the establishment of a bursary fund budget vote and budget therein such sums of money as the council may determine from time to time.

6.1.1 And/or the Council may approve the utilization of the Training Budget as a source for the Bursary Fund.

**Commented [PM3]:** Create a separate vote item for the bursary

6.2. The Council may subject to the provisions hereinafter contained, annually approve a budget for the granting of bursaries to employees for the purpose of assisting them to follow an approved course of study at a learning institution.

6.3 The number of bursaries granted by the Council annually shall be determined by the availability of funds. "limited to the applicants for their first degree or formal qualification: National Diploma, National Certificate

**Commented [PM4]:** Insert the phrase to extend the qualification to a bursary

## 7. CRITERIA FOR THE GRANTING OF BURSARY

7.1. Bursary shall be granted to an employee for any course, which is relevant employee's functions and /or his specific role description in the municipality, promoting the JIPSA objectives and addressing priorities as indicated in the District Growth and Development Strategy and the District Development Model

7.2. Bursary shall be granted to an employee for a course or programme that is relevant for the career path planning of that particular employee notwithstanding, clause 4 and 5 above.

7.3. Bursary shall be granted to employees who;

7.3.1 Have registered with an institution which is approved by the South African Qualifications Authority (SAQA)

7.3.2. Have applied in writing for a bursary on the prescribed application form

7.3.3. Indicate satisfactory performance in their studies. That is passing at least 75% of the prescribed courses for the year

7.3.4. Have signed bursary agreement setting out the terms and conditions of the bursary awarded and repayment processes.

7.3.5. Have registered with the "institution neighbouring" the Local, the Municipal Manager shall apply his/her discretion where an employee has registered with an institution outside those referred to as "neighbouring institutions" but within the Republic of South Africa.

## **8. APPROVAL OF BURSARIES**

8.1. The Municipal Manager and the Mayor shall appoint a Bursary Committee to be constituted by three Officials to serve as an advisory Committee and recommend the awarding/ none awarding of bursaries to them.

8.1.1 And/or the awarding of the bursary shall solely be the responsibility of the HR & Corporate Services Directorate including the administration thereof.

8.2. Each application assessed by the Skills Development Facilitator shall have a recommendation/approval by the Director/Manager of the applicant and the Director of HR & Corporate Services shall authorize the utilization of the vote for the particular applicant/applicants.

8.3. The authority to award bursary in terms of this policy is delegated to the HR & Corporate Services Director with the Municipal Manager giving the final approval.

8.4. An employee aggrieved by the non-approval of his application for a bursary by the Municipal Manager shall make a full presentation in writing to Mayor stating clearly the reasons for his dissatisfaction, and the decision of the Mayor shall be final.

## 9. AMOUNT AND PAYMENT

9.1 The amount awarded to an employee shall depend on the approved qualification, subject to admission by a recognised institution, for a particular **first** Certificate, Diploma or Degree, per annum **to** a maximum of R50 000.00 for an employee

**Commented [PM5]:** The maximum amount to be set

9.2. The payment shall be made directly to the institution on behalf of the employee, and the following shall be conditions of the bursary provided to the institution;

9.2.1. That no refund shall be paid by the institution to the employee;

9.2.2. All balances in the student account at the end of the academic year shall be paid back to the Municipality;

9.2.3. That the institution **and the employee** shall inform the Municipality in instances where the employee has more than one bursary or another source of funding except for MLM bursary.

**Commented [PM6]:** Include the employee to also take accountability of declaring other bursaries

9.3. The amount shall only be for registration, tuition (excluding books) and examination.

9.4. No subsistence and traveling allowance or any other expenditure shall be paid for except payment as mentioned in clause 9.3 above.

9.5. Payment shall be made subject to the submission of the Admission letter, information on registration, tuition (excluding Books) and examination fees and a fully signed bursary agreement.

9.6. No payment shall be made for the following year of study provided:

9.6.1. Previous examination results are submitted by the employee to the Directorate Human Resources and Corporate Services;

9.6.2. All the subjects/modules have been passed or back-payment has started or an arrangement has been made with the Directorate: Budget and Treasury for the repayment of the fees for subjects/modules that the employee has failed provided that at least 75% of the prescribed courses for the year has been passed by the employee as contemplated in clause 7.3.3 above.

9.6.3. The Municipality will not pay for the failed courses, the employee shall undertake to pay for those courses he/she failed.

## **10. OBLIGATIONS**

### **10.1 THE EMPLOYEE'S OBLIGATIONS**

10.1.1 Upon receiving a bursary from MLM an employee commits him/herself that she/he will not receive any form of a bursary or funding from other schemes.

10.1.2 The employee shall apply and register for himself or herself at the Institution for the qualification and shall undertake all studies and do all things necessary to obtain the qualification.



10.1.3 The employee shall ensure that he/she is conversant with the Bursary policy and shall also undertake to acquaint him/herself with such amendments as may from time to time be made to the policy.

10.1.4 The employee shall not have the right to cede or assign his/her rights or obligations under the Bursary agreement or in any way pledge the monies paid to or on behalf of him/her in terms of the Bursary Agreement.

10.1.5 The employee shall not have a right to change courses and or qualification approved and funded by the Municipality without a written consent by the Municipal Manager.

10.1.6 At the end of each academic year, within 15 working days after the publication of the examination results by the Institution, the Employee shall provide the Council with evidence of his/her results in the course of study towards the qualification undertaken by him/her during that year.

10.1.7 After completing his /her studies the Employee shall undertake to remain in the employment of the Municipality for the period equivalent to that of his/her study using Municipal Bursary Fund, during such period no further bursary shall be granted by MLM.

10.1.8 Fixed term contract employees shall not be affected by clause 10.1.7 if the end of service with the Municipality is due to expiry of his/her employment contract, where benefiting employees leaves before the end of the contract 10.1.9 should apply.

10.1.9 An employee leaving the municipal employment at any time before the expiration of the period of service mentioned in 10.1.7 above, shall pay the Municipality the bursary amount in full for the outstanding years.

10.1.10 In the event the employee leaves the Municipality while on study bursary the Municipality shall terminate the bursary and evoke clause 10.1.7.

10.1.11 The employee shall be responsible for own transportation and accommodation if required and the employer shall not reimburse any expenses as a result of the employee acquiring accommodation and transportation

**Commented [PM7]:** Include this clause of obligations on the employee

## 10.2 EMPLOYER'S OBLIGATIONS

10.2.1 The Employer undertakes to pay timeously all financial commitments resulting from approved bursaries

10.2.2 All institutions will be verified to establish their registration with Higher Education Council, SETA's to ensure that all qualifications obtained are valid and credible

10.2.3 The employer will provide secure accommodation while following Supply Chain Management processes, for all officials whose attendance may require sleeping over, upon approval for the use of funds from the immediate supervisor or the Director/Manager.

**Commented [PM8]:** Delete this clause of the employer paying for accommodation

10.2.4 The Employer will not pay for any accommodation reserved without following Supply Chain Management processes

## 11. REPAYMENT METHOD

11.1. The bursary awarded to the employee is immediately repayable after non compliance with clause 10.6 above and/ or immediately when it is evident that the employee has failed certain modules or subject as contemplated in clause 9.6.2

11.2. The employee shall repay the full amount owing to the municipality at that stage. Repayment shall be done in equal instalments, calculated by the municipality commencing the first day following the month in which the employee failed to submit results and or failed subjects/modules as contemplated in clauses 9.6.2. and 10.6.

11.3. The repayment installment shall equal the amount of years during which the bursary was granted.

## 12. STUDY LEAVE

12.1. The employee shall be entitled to an examination leave for the date(s) upon which he/she is required to present him/herself for an examination as prescribed by the Institution plus one day study leave prior to the examination date.

12.2. Where employees are required to attend contact lessons, study leave shall be provided for 50% of the lessons' days and the other 50% shall be the employee's holiday leave. Employees must provide Moretele Local Municipality with proof of attendance on return from contact lessons.

## 13. GRATUITY GESTURE

13.1 Upon successful completion of the study and the final results are within the HR & Corporate Services records, the Municipality undertakes to award the applicant with the one-off month taxable salary in addition to the normal monthly salary as a token of appreciation. This clause will be repealed by:

13.1 No gratuity will be paid to the employee upon completion of their studies. This is so, as to enable the Municipality to equitably distribute the financial resources to an anticipated increased volume of interest.

**Commented [PM9]:** Delete the clause of gratuity upon completion

# **MORETELE LOCAL MUNICIPALITY**



## **APPLICATION FORM FOR A BURSARY: EMPLOYEES YEAR: 2023**

**NB: Please write clearly, answer all the questions fully and attach supporting documents where required.**

**1. PARTICULARS OF STUDY**

Institution:.....

Student number (if any): .....

Course: .....

Duration of the course.....

**Subjects/ modules (Year Applying For)**

**Cost**

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

**TOTAL AMOUNT APPLYING FOR:.....**

**Motivation:**.....

.....

.....

.....

.....

.....

.....

.....

**2. PERSONAL PARTICULARS**

Title:.....Surname:.....Initials.....

First names:.....

Employee No: .....

Identity No: .....

Position.....

Directorate.....

Postal address:.....

.....

.....

Postal code: .....

Home address: .....

.....

.....

Postal code: .....

Contact telephone/cell no: .....

**3. EDUCATIONAL PARTICULARS – TERTIARY INSTITUTION  
(Please attach a copy of proof of admission, if applicable)**

Highest Qualification.....

Current Studies (If any) .....

Duration of the Current Course.....

Subjects already passed (attach official results)

\_\_\_\_\_  
**APPLICANT**

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

**4. STATISTICAL INFORMATION**

Have you applied for the bursary before, Yes/No

If Yes, were you approved, Yes/No

If Yes, how much was approved: R.....

Name of the programme: .....

Institution Attended: .....

Status of the programme

Completed	Terminated	In Progress	
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Please tick the applicable column

- **Attach the recent year end results/academic record for approved bursary**
- **The form must be completely filled and signed with initials on each page at the bottom right corner**
- **Failure to submit required documents will results in your application not considered**

6.

<b>FOR OFFICE USE – DIRECTOR FOR HR &amp; CORPORATE SERVICES</b>	
<b>Application Recommended / Not Recommended</b>	
Amount Recommended:.....	
Institution Recommended .....	
<b>COMMENTS</b>	
.....	
.....	
.....	.....
<b>DATE</b>	<b>SIGNATURE</b>

<b>FOR OFFICE USE – : DIRECTOR/AMANAGER FOR</b>	
<b>Application Recommended/Not Recommended</b>	
Amount Recommended.....	
Institution Recommended ..... <b>COMMENTS:</b>	
.....	

<p>.....</p> <p>.....</p> <p><b>DATE</b></p>	<p>.....</p> <p>.....</p> <p style="text-align: center;"><b>SIGNATURE</b></p>
<b>FOR OFFICE USE – MUNICIPAL MANAGER</b>	
<p><b>Application Approved / Declined</b></p> <p><b>Amount Approved:</b>.....</p> <p><b>Institution Approved:</b> .....</p> <p><b>COMMENTS</b></p> <p>.....</p> <p>.....</p> <p>.....</p>	
<p>.....</p> <p><b>Date</b></p>	<p>.....</p> <p style="text-align: center;"><b>MUNICIPAL MANAGER</b></p>

**THE EMPLOYEE’S OBLIGATIONS**

The employee undertakes that:

1.1 Upon receiving a bursary from MLM an employee commits him/herself that she/he will not receive any form of a bursary or funding from other schemes.

1.2 The employee shall apply and register for himself or herself at the Institution for the qualification and shall undertake all studies and do all things necessary to obtain the qualification.



1.3 The employee shall ensure that he/she is conversant with the Bursary policy and shall also undertake to acquaint him/herself with such amendments as may from time to time be made to the policy.

1.4 The employee shall not have the right to cede or assign his/her rights or obligations under the Bursary agreement or in any way pledge the monies paid to or on behalf of him/her in terms of the Bursary Agreement.

1.5 The employee shall not have a right to change courses and or qualification approved and funded by the Municipality without a written consent by the Municipal Manager.

1.6 At the end of each academic year, within 15 working days after the publication of the examination results by the Institution, the Employee shall provide the Council with evidence of his/her results in the course of study towards the qualification undertaken by him/her during that year.

1.7 After completing his /her studies the Employee shall undertake to remain in the employment of the Municipality for the period equivalent to that of his/her study using Municipal Bursary Fund, during such period no further bursary shall be granted by MLM.

1.8 Fixed term contract employees shall not be affected by clause 10.7 if the end of service with the Municipality is due to expiry of his/her employment contract, where benefiting employees leaves before the end of the contract 10.9 should apply.

1.9 An employee leaving the municipal employment at any time before the expiration of the period of service mentioned in 10.7 above, shall pay the Municipality the bursary amount in full for the outstanding years.

1.10 In the event the employee leaves the Municipality while on study bursary the Municipality shall terminate the bursary and evoke clause 1.7.

**2. REPAYMENT METHOD**

2.1. The bursary awarded to the employee is immediately repayable after non compliance with clause 10.6 above and/ or immediately when it is evident that the employee has failed certain modules or subject as contemplated in clause 9.6.2 of the policy

2.2. The employee shall repay the full amount owing to the municipality at that stage. Repayment shall be done in equal installments, calculated by the municipality commencing the first day following the month in which the employee failed to submit results and or failed subjects/modules as contemplated in clauses 9.6.2. and 10.6.

2.3. The repayment installment shall equal the amount of years during which the bursary was granted.

**SIGNED BY:** \_\_\_\_\_ **ON THIS DAY** \_\_\_\_\_ **OF**  
\_\_\_\_\_ **2023**

**WITNESSES:**

1. \_\_\_\_\_ 2. \_\_\_\_\_ **NAME &**  
**SURNAME NAME & SURNAME**

\_\_\_\_\_  
**SIGNATURE**

\_\_\_\_\_  
**SIGNATURE**