



# OFFICE OF THE PREMIER

## BURSARY POLICY - HRM 009, 2024

## Table of Contents

	<b>Item title</b>	<b>Page</b>
	Definition	4
1.	Introduction	5
2.	Purpose	5
3.	Regulatory Framework and Mandate	5 - 6
4.	Scope of Applicability	6
5.	Policy Principles	6 - 7
6.	Bursary Administration Process	7
6.1	Applications	7
6.2	Criteria for Awarding a Bursary	7
6.3	Value of the Bursary	8
6.4	Duration of the study	8
6.5	Extension of Study Period	8
6.6	Fees Payment Process	8 - 9
7.	Bursary Exclusions	9
7.1	Bursary does not cover the following	9 - 10
7.2	Contractual Obligations	10
8.	Change of approved study field	10 -11
9.	Change of academic institution	11
10.	Waiving of study period	11
11.	Study leave	12
12.	Study loan takeover	12
13.	Transfer in and out of the Office	12
14.	Subsistence travel and accommodation	12
15.	Withdrawal and recovery of bursary	13
16.	Roles and Responsibilities	13
16.1	Immediate Supervisor	13
16.2	Employee	13 - 14
16.3	Director General	14
16.4	Human Resources Development Committee	14 - 15

16.5	Human Resource Development	15 - 16
17.	Policy Monitoring and Review	16
18.	Compliance	16
19.	Approval	16

## DEFINITIONS

**Bursary;** means financial assistance granted by the Office to an employee to obtain a formal qualification;

**A Bursary holder;** refers to an employee who has been granted a bursary by the Office to study towards a formal qualification;

**Contractual obligations;** refer to obligations, terms and conditions as contained in the bursary as well as work contract;

**Formal qualification;** refers to a qualification accredited through the National Qualifications Framework;

**Office;** refers to Office of the Premier: North West province

**Part-time Studies;** refer to studies undertaken using distance learning/after-hours while working;

**Public institution;** refers to a higher educational institution registered with the Department of Higher Education & Training offering accredited post-matric qualifications. This includes Universities, the University of Technology, Further Education & Training Colleges, and Technical and Vocational Education and Training Colleges.

**Service obligation;** refers to the period during which the employee should serve the Office post-completion of his/her studies;

**Satisfactory progress;** refers to instances where the bursary holder has passed 50% or more of the modules/subjects registered in a specific semester/ annually.

## **1. INTRODUCTION**

The Office of the Premier is committed to the training and development of its employees. In pursuit of this commitment, the Office through this policy undertakes to provide financial support to its employees to enable them to obtain formal and accredited qualifications, particularly those without formal qualifications. In this regard, the Office will endeavour to create a conducive working environment that shall allow the employees to study whilst fulfilling their professional obligations as public servants. This policy governs and outlines all the requirements, processes, and procedures to award bursaries to the employees in the Office.

## **2. PURPOSE**

- 2.1 The purpose of this policy is to provide a framework for the administration and management of bursaries awarded by the Office to its employees by:
  - 2.1.1 Address the inequalities of the past through financial assistance to study for accredited and formal qualifications.
  - 2.1.2 Establish a fair and transparent process in the awarding of bursaries.
  - 2.1.3 Encourage continuous training and development of employees through formal learning.

## **3. REGULATORY FRAMEWORK AND MANDATE**

- 3.1 This policy is regulated by the following legislation:
  - 3.1.1 Constitution of the Republic of South Africa, 1996
  - 3.1.2 Public Service Act, 1994, as amended;
  - 3.1.3 Public Service Regulations, 2016;
  - 3.1.4 Skills Development Act 1998, (Act No. 97 of 1998) as amended;
  - 3.1.5 Employment Equity Act 1998, (Act No. 55 of 1998);
  - 3.1.6 Public Finance Management Act, (Act No. 1 of 1999) as amended;
  - 3.1.7 Treasury Regulations;
  - 3.1.8 National Qualifications Framework Act (NQF);

- 3.1.9 Collective Agreements, Public Service Coordinating Bargaining Council Resolutions;

## **4. SCOPE OF APPLICABILITY**

- 4.1 This policy applies to all permanent employees in the Office of the Premier.

## **5. POLICY PRINCIPLES**

- 5.1 The following are the principles underpinning this policy:

- 5.1.1 The bursary administration process shall be free of unfair discrimination, whether direct or indirect on all listed grounds, including but not limited to race, marital status, religion, HIV status, culture, pregnancy, political affiliation, language, sex, colour, ethnicity or social origin and disability;
- 5.1.2 Qualifications to be pursued through this policy are junior degrees, postgraduate certificates and diplomas, honors degrees, master's degrees and doctoral degrees, Adult Basic Education Training qualifications, Further Education and Training qualifications, Grade 10-12, national certificates and national diplomas;
- 5.1.3 Bursary shall be awarded to support the development of employees and for the benefit of the organization;
- 5.1.4 Bursaries shall be awarded for part-time and/ or distance learning studies at accredited public and private institutions.
- 5.1.5 In the event a bursary applicant intends to study at a private institution the official pay the amount which does not exceeds the cost of the same course at a public institution after comparing/ benchmarking with the cost of at least two public institution.
- 5.1.6 Studying at international institutions shall be regulated by the relevant prescripts as issued by the Department of Public Service and Administration and preference shall be given to postgraduate students at the master's level;
- 5.1.7 Bursaries shall be awarded subject to the availability of funds and may be withdrawn at any time by the employer, subject to non-compliance of the rules;
- 5.1.8 Bursaries may be awarded per year considering the empowerment of Women, Youth and people with disability;

- 5.1.9 If an applicant has applied for a bursary for a study program, he/she is currently pursuing, a bursary shall be limited for the remaining duration of the program with no reimbursement paid for the already passed subjects/modules;
- 5.1.10 Considering that the bursary holder is an employee, he/she shall register a reasonable number of subjects/ modules that will enable him/her to complete the studies within the prescribed period bearing in mind the Office work he/she needs to perform without hindrance.

## **6. BURSARY ADMINISTRATION PROCESS**

### **6.1 APPLICATIONS**

- 6.1.1 Applications for bursaries shall be invited through an internal advertisement published using corporate communications to all employees in the Office by the 31<sup>st</sup> of August each year with the closing date of the 30<sup>th</sup> of September.
- 6.1.2 A prescribed application form obtainable from the Human Resources Management shall be completed fully accompanied by all the required supporting documentation as indicated in the advertisement.
- 6.1.3 Applications must be accompanied by proof of admission from the institution for the intended field of study.

### **6.2 CRITERIA FOR AWARDING A BURSARY**

- 6.2.1 The newly appointed employee must have served the Public Service for one year.
- 6.2.2 The applicant must not have any other sponsored state bursary.
- 6.2.3 Employees who were previously granted bursaries and breached such bursaries may be granted new bursaries provided that all outstanding debt from the previous years has been recovered.
- 6.2.4 Proximity to the workstation, particularly for part time graduate studies and higher education institutions within the North West province,
- 6.2.5 In the event the higher education institutions within the North West province do not offer the preferred study program, applications for institutions in other provinces may be considered, subject to proximity to minimize the costs.

### **6.3 VALUE OF THE BURSARY**

- 6.3.1 The value of the bursary shall be determined by the costs associated with the study program.
- 6.3.12 The bursary will cover registration fees, tuition fees, examination fees, library card fees, and the prescribed study books.
- 6.3.3 The Office will process payment directly to the academic institution for the full tuition amount within five (5) working days, subject to the submission of proof of registration and statement of account by the employee.

### **6.4 DURATION OF STUDY**

- 6.4.1 The duration of study shall be as prescribed by the academic institution.

### **6.5 EXTENSION OF STUDY PERIOD**

- 6.5.1 If the bursary holder realizes that he/she cannot complete the studies within the prescribed period of study, he/she must submit a motivated request for extension to Human Resources Management, recommended by the supervisor.
- 6.5.2 The request for an extension of the bursary must be submitted to HRD sixty (60) days before the end/expiry of the current bursary contract.
- 6.5.3 The examination results must accompany the request for registration payment sixty (60) days before the commencement of the next academic year/semester.
- 6.5.3 Each request for extension shall be considered by the Human Resources Development Committee based on its merits with a recommendation for a maximum extension period of two (2) years of study made to the approving authority.
- 6.5.4 Workload shall not be accepted as a valid reason for requesting an extension of the study period.

### **6.6 FEES PAYMENT PROCESS**

- 6.6.1 The payment of fees associated with the bursary is subject to the following:

- 6.6.1.1 Signing of a bursary contract;
- 6.6.1.2 Submission of the original statement of account/invoice with a breakdown of subjects/modules and proof of admission/ registration on the letterhead and stamped;
- 6.6.1.3 A letter/ course outline from the academic institution indicating the prescribed books on the letterhead and stamped; the Department is not liable for payment of recommended study materials.
- 6.6.1.4 Original quotation of books from the bookshop;
- 6.6.1.5 Bursary holders are required to submit proof of purchased prescribed books to HRD, refunds will be made to employees who purchased prescribed books from their budget.
- 6.6.1.6 Request for refund of purchased prescribed books should be accompanied by original invoices from the bookstores, proof of payment, and a list of prescribed books from the academic institution.
- 6.6.1.7 Submission of original examination results on an original letterhead of the academic institution.
- 6.6.1.8 In the event the institution of learning requires an immediate minimum payment of registration, the employee must pay the amount and claim the said cost from the office.
- 6.6.1.9 In the event of paragraph 6.6.1.8 above, the bursar is required to submit proof of payment and the latest statement of account from the institution.

## **7. BURSARY EXCLUSIONS**

### **7.1 THE BURSARY DOES NOT COVER THE FOLLOWING:**

- 7.1.1 Conferences and seminars to be attended during studies;
- 7.1.2 Nonaccredited programs
- 7.1.3 Any pre-assessment required for admission by the academic institution;

- 7.1.4 Supplementary and special examinations;
- 7.1.5 Penalties linked to the student account caused by the student;
- 7.1.6 Fees linked to repeat courses/ modules and associated interests;
- 7.1.7 Stationery and/ or copies of study material;
- 7.1.8 Postage costs associated with the studies;
- 7.1.9 Telephone calls and professional subscription fees;
- 7.1.10 Any incidental costs incurred by the bursary holder;
- 7.1.11 Notebooks, iPads, and calculators;
- 7.1.12 Application for admission fees;
- 7.1.13 International and local Study tours, unless such tours are prescribed as part of the studies for which bursary was granted.
- 7.1.14 The Department does not allocate bursaries for bridging and Recognition of Prior Learning courses;
- 7.1.15 Refund for purchased prescribed books from the street vendors.

## **7.2 CONTRACTUAL OBLIGATIONS**

- 7.2.1 Bursary holders shall sign a bursary contract with the Office for the period of study as prescribed by the academic institution.
- 7.2.2 If a bursary is not utilized in the year that it has been approved for without written approval by the Office, it shall automatically lapse.
- 7.2.3 Any request for extension shall be considered in line with paragraph 6.5 above.
- 7.2.4 Should the employee terminate his/her studies for any reason (except for the termination because of operational requirements, death, or incapacity due to ill health and dismissal) before completion of the study program, he/she shall be liable to the full costs incurred on tuition fees and prescribed books. Associated with his/her study program.

## **8. CHANGE OF APPROVED STUDY FIELD**

- 8.1 A bursary holder shall not change the course of study program that he/she has been approved for without obtaining approval from the relevant delegated authority;
- 8.2 A change of study field shall be permitted once.

8.3 A fully motivated request to change the study program shall be submitted to the Human Resources Management Director and recommended by the Chief Director of Corporate Management for approval by the Director General.

8.4 The new study program shall remain relevant to the functions performed by the employee as the priority and/ or broadly those of the Office.

## **9. CHANGE OF ACADEMIC INSTITUTION**

9.1 A bursary holder shall not change the academic institution without obtaining approval from the Director General. A change of academic institution shall be permitted once.

9.2 A fully motivated request to change the academic institution shall be submitted to the Human Resources Management Director and recommended by the Human Resources Development Committee Chairperson for approval by the Director General.

9.3 Preferences will be granted to changes informed by employee relocation/transfers within the Office.

## **10. WAIVING OF STUDY PERIOD**

10.1 Waiving of studies shall be permitted once under the following circumstances:

10.1.1 Proven medical reasons;

10.1.2 Operational reasons initiated by the employer;

10.1.3 If the academic institution requires the bursary holder to study for a bridging course before admission to the study program that the bursary has approved for it.

10.1.4 A fully motivated request to waive the study period shall be submitted to the Human Resources Management and recommended by the Human Resources Development Committee for approval by the Director General.

## **11. STUDY LEAVE**

11.1 Study leave shall be granted within the provisions of the Leave policy in the public service.

## **12. STUDY LOAN TAKEOVER**

12.1 The Office shall not take the study loan over from an employee who has been studying through a loan before being awarded a bursary.

12.2 The employee shall remain responsible for the re-payment of the study loan whilst the bursary shall cover the costs of studies effective from the date the bursary was awarded.

## **13. TRANSFER IN AND OUT OF THE OFFICE**

13.1 If a bursary holder transfers out of the office, the contract shall automatically lapse.

13.2 If the recipient declines to take over the bursary, the bursary contract between the former employee and the Office shall automatically lapse.

13.3 If a bursary holder of a bursary granted by another department transfers to the Office of the Premier or is appointed in the Office and requests a bursary takeover, the Office shall consider the request in terms of the following criteria:

13.3.1 Availability of funds;

13.3.3 Study progress at the time of transfer/ appointment into the Office.

## **14. SUBSISTENCE TRAVEL AND ACCOMMODATION**

14.1 Bursary holders who enrolled with institutions outside the proximity of their workstations shall be provided with subsistence traveling and accommodation for block or class attendance and writing of examinations in line with the Subsistence & Travelling policy.

14.2 Accommodation and subsistence & traveling costs of the bursary holder during attendance of classes and writing examinations shall be payable from the officials' Directorate budget.

14.3 The Office will be liable for the provision of official transport and payment of accommodation when bursary holders are attending graduation ceremonies.

## **15. WITHDRAWAL AND RECOVERY OF BURSARY**

15.1 The Office shall withdraw the bursary awarded to a bursary holder and recover the total costs incurred at the prevailing interest rates as determined by the Provincial Treasury, if:

15.1.1 Requested by the bursary holder;

15.1.2 The fees paid on the repeating subjects/modules;

15.1.3 The bursary holder abandons his/her studies;

15.1.4 The bursary holder fails to register in the year for which the bursary is awarded;

15.1.5 The bursary holder fails to complete his/her studies;

15.1.6 The bursary holder fails to submit results;

15.1.7 The bursary holder fails to meet the requirements for the granting of an extension of the study period;

15.1.8 The bursary holder is expelled from the academic institution;

15.1.9 The bursary holder breaches any conditions of this policy and the bursary contract;

## **16. ROLES AND RESPONSIBILITIES**

### **16.1 IMMEDIATE SUPERVISOR**

16.1.1 The immediate supervisor shall:

16.1.1.1 Assist employee with the identification of appropriate field of study, particularly in instances wherein the need to study arises from performance discussions;

16.1.1.2 Recommend the employee's application for a bursary;

16.1.1.3 Provide support to the bursary holder by creating a conducive environment to work and study simultaneously.

### **16.2 EMPLOYEE**

16.2.1 The employee shall:

16.2.1.1 Apply for a bursary;

16.2.1.2 Sign a bursary contract with the Office;

- 16.2.1.3 Be committed to the studies;
- 16.2.1.4 Subject himself/ herself to the rules of the academic institution;
- 16.2.1.5 Fulfil the contractual obligations of the bursary;
- 16.2.1.6 Pay back the total amount of financial assistance plus interest when the contract is terminated before fulfilling the contractual obligations of the bursary;
- 16.2.1.7 Submit proof of registration /statement of account from the academic institution for every semester and/ or annual registration;
- 16.2.1.8 Submit a list of prescribed books, original invoices, and proof of payment for purchased study books.
- 16.2.1.9 Submit examination results after each examination period;
- 16.2.1.10 Applies for extension of study period/change of study field /change of institution/waive of study period;
- 16.2.1.11 Responsible for application fees and fees payable to professional associations where registration on the program requires membership of such professional associations;
- 16.2.1.12 Perform his/her responsibilities as per the performance agreement with the supervisor;
- 16.2.1.13 Never uses studies as a basis for underperformance.

### **16.3 DIRECTOR- GENERAL**

16.3.1 The Director-General/ the delegated official shall:

- 16.3.1.1 Ensures that all employees adhere to the policy provisions without exception;
- 16.3.1.2 Ensures availability of funds for bursary allocations;
- 16.3.1.3 Approves the recommendations for bursary applications from the Human Resources Development Committee;
- 16.3.1.4 Sign-off bursary contracts on behalf of the Office.

### **16.4 HUMAN RESOURCES DEVELOPMENT COMMITTEE**

16.4.1 The Human Resources Development Committee shall:

- 16.4.1.1 Determine the criteria for awarding bursaries in line with paragraph 6.2,

- 16.4.1.2 Conduct the selection process for awarding bursaries;
  - 16.4.1.3 Make recommendations to the Director General for approval of bursary applications;
  - 16.4.1.4 Review bursary progress reports submitted by Human Resources Management and make recommendations for approval;
  - 16.4.1.5 Meet once a quarter;
  - 16.4.1.6 Ensures consistency, equity, and fairness in the awarding of the bursaries;
  - 16.4.1.7 Ensures that the bursaries are awarded in the interest of the Office;
  - 16.4.1.8 Provide inputs in the review/ development of the bursary policy.
- 16.4.2 The Human Resources Development Committee shall be constituted by the following:
- 16.4.2.1 Chief Director: Corporate Management - Chairperson;
  - 16.4.2.2 Chief Director: Policy and Planning;
  - 16.4.2.3 Director: Human Resources Management;
  - 16.4.2.4 Director: Provincial Human Resources Development
  - 16.4.2.5 Director: Budgeting;
  - 16.4.2.6 Director: Strategic Management Services;
  - 16.4.2.7 Chief Risk Officer;
  - 16.4.2.8 Representative of the Employment Equity Forum;
  - 16.4.2.9 Deputy Director: Human Resources Development — Secretariat & Advisory Services.
  - 16.4.2.10 The chairperson plus four members will make a quorum to adjudicate on the HRD Matters.

## **16.5 HUMAN RESOURCES DEVELOPMENT**

- 16.5.1 The Human Resources Development shall:
- 16.5.1.1 Develop and review the bursary policy;
  - 16.5.1.2 Monitor and advice on the implementation of the bursary policy;
  - 16.5.1.3 Administer the bursary applications and manage bursary contracts;

- 16.5.1.4 In consultation with Legal Services, develop a memorandum of understanding with institution/s where a majority of the students are studying for purposes of accessing students records;
- 16.5.1.5 In consultation with the Chairperson, convene the Human Resources Development Committee meetings;
- 16.5.1.6 Monitor study progress of bursary holders;
- 16.5.1.7 Develop and maintain a database of all bursary holders;
- 16.5.1.8 Prepares progress reports for the Human Resources Development Committee and Management in the Office.
- 16.5.1.9 Budget for bursaries in the Office;
- 16.5.1.10 Promptly facilitate payments to academic institutions and bookshops on behalf of bursary Holders.
- 16.5.1.11 Process payment for tuition fees and refund bursary holders in instances where self-payments were made whilst in possession of the bursary;
- 16.5.1.12 Maintain accurate filing and record keeping of the bursary records in the Office;
- 16.5.1.13 Provide Secretarial and advisory services to the Human Resources Development Committee.

## **17 POLICY MONITORING AND REVIEW**

- 17.1 The Director: Human Resources Management shall monitor the implementation of this policy and review it as and when the need arises.

## **18 COMPLIANCE**

- 18.1 Failure to comply with this policy will result in disciplinary actions.

## **19 APPROVAL**



---

**M.P MOGOTLHE**

**DIRECTOR-GENERAL**

**DATE OF APPROVAL:**

31/03/2025