

BURSARY POLICY

1. INTRODUCTION

The Department of Education is committed to providing financial aid in a form a bursary to staff members who are interested in improving their knowledge and skills. Applications for bursaries will be assessed on merit.

2. THE OBJECTIVES

- 2.1 To afford employees in the Department the opportunity to equip themselves through formal study with more knowledge and skills in order to perform their present and possible future duties well.
- 2.2 To encourage employees to develop themselves and their career.
- 2.3 To cultivate a culture of life-long learning.

3. DEFINITIONS

“ Employer “

Refers to the Department of Education (DOE)

“ Experiential Learning “

Unstructured training that expose bursar to the working environment under the guidance of an experienced person to acquire the necessary skills.

“ Contract “

An agreement between the employer and the bursar describing the conditions of a bursary and the benefits thereof.

“Internal bursary”

A part time study aimed at developing current staff in their line functions.

“Bursar”

A permanent employee who have granted an approved bursary by the Department of Education.

4. PRINCIPLES

4.1 Commitment

Bursars must be committed to their studies and abide by the rules and conditions governing the bursary contract with the Department.

4.2 Accountability

Each party to the contract will be held accountable for their action of non-performance.

4.3 Fairness

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

4.4 Partnership

A partnership between the employer and the bursar is formed when the Department grants a bursary and the bursar accepts it by signing the contract. Each party should keep to terms and conditions of the contract.

4.5 Transparency

All processes stemming from the partnership should be conducted openly between the parties.

4.6 Funding

The Department will budget for bursaries and make funds available for the development of its employees.

5. STATUTORY PROVISIONS AIMED AT PROMOTING EDUCATION AND DEVELOPMENT WITHIN THE PUBLIC SERVICE

5.1 Public Service Regulations

5.2 Employment Equity Act

5.3 Skills Development Act

5.4 Labour Relations Act

5.5 National Qualification Framework

6. THE SELECTION CRITERIA

6.1 Bursaries will be granted to officials who wish to obtain pre-tertiary qualifications (the equivalent of *ABET to grade 12, National Diploma, Degree, and Honours*).

6.2

- Applicants who would like to enroll or acquire a first tertiary qualification with a minimum value of RQV13 (i.e. diplomas and junior degrees) at the university/technikon will be given first preference in awarding bursaries.
- *Officials who wish to enroll for Masters and Doctoral degrees will only be funded depending on the availability of funds*

6.3 Applications from candidates on the production and advanced production levels as well as supervisory level (up to and including the Deputy Director) who would like to enroll for junior or honours degrees will be given first preference.

6.4 Members of Senior Management do not qualify.

6.5 Length of service of an official, new appointees would first have to complete a probation period.

6.6 Work performance /attitudes towards work will be taken into consideration.

6.7 Applicants should register with state institutions, except when only a private institution offered a certain course.

6.8 *For recurring bursary holders* academic performance will be taken into consideration.

6.10 Availability of funds.

6.11 Structured short-courses will be funded from the Skills Development and training budget.

6.12 Applicants who wish to enroll for a horizontal qualification in another discipline provided that qualification has direct relevance to the relevant post requirement/job content.

7. INVITATION

- 7.1 The availability of bursaries will be advertised annually inside the Department.
- 7.2 Officers will be invited to apply for bursaries through a Departmental circular that will be sent out by the 15 September every year, giving applicants a calendar month opportunity to apply.
- 7.3 The Directorate: Staffing will be responsible in disseminating information to all officials in their respective Branches to ensure that the bursary scheme is accessible to all.

8. APPLICATION FOR A BURSARY

- 8.1 *Officials* who wish to apply for a bursary must do so on the prescribed Department Bursary Application *form* (Annexure).
- 8.2 All applications must be accompanied by a certified copy of the candidates' results as issued by the relevant academic institution.
- 8.3 Proposed curriculum for duration of studies.
- 8.4 Proof of costs for particular year.
- 8.5 Proof of acceptance for the intended course of study by the institution.

9. ROLE OF BURSARY COMMITTEE AND SELECTION PROCESS

- 9.1 The Head of Department will appoint the Bursary Committee.
- 9.2 Members will consist of Chief Directors, Director: Staffing Services and the Deputy Director: Training and Special Programmes.
- 9.3 The Bursary committee will assess applications for bursaries.
- 9.4 The Bursary Committee will also be responsible for making recommendations regarding the granting of bursaries to the head of Department or his delegate for approval.
- 9.5 The Bursary Committee will ensure that the approved budget is not exceeded.

10. BURSARY ADMINISTRATION

- 10.1 The Sub-Directorate: Training and Employee Relations will administer the Bursary Scheme
- 10.2 All applicants will forward the bursary application forms to the Deputy Director: Training and Employee Relations before the closing date for preparation of awarding the bursary committee.

10.3 The Director: *Internal Training* will inform applicants *of the outcomes of the application once the Director General has approved.*

10.4 All bursars must enter into bursary agreement with the Department. The bursary contract must be correctly and fully completed. Insufficient and incorrect information in the contract may lead to termination of bursary contract.

10.5 Bursars must submit proof of registration to the Deputy Director: Training and Employee Relations

10.6 Bursars will be monitored through submission of examination results 30 days after each examination sitting. The maintenance of bursary contract will depend on the bursar's performance and conduct.

11 BURSARY CONDITIONS

Conditions tabled below apply to employees granted bursaries in the Department.

11.1 Forfeiture

Failure to submit the signed bursary acceptance letter and/or proof of registration within one month after the bursary has been awarded will lead to the bursary being forfeited.

11.2 Postponement of Bursary obligation

Failure of a subject(s) or any other factor, extend the bursar's study period and thus making it impossible for the bursar to complete the studies as expected.

- (i) In such cases, a written approval for postponement of the study obligation, recommended by the line function manager will be forwarded to the Director: Staffing Services who will submit the application to the chairperson of the bursary committee for approval.
- (ii) Postponement of study obligation will be permitted for one year only.
- (iii) Postponement without prior approved arrangement or notification will constitute a breach of contract.

- (iv) Failure to continue without any reason or to submit exam results after one month of completion will constitute a breach of contract leading to withdrawal from study.

11.3 Abandonment of study

- (i) Abandonment of study constitutes a breach of contract.
(ii) Bursar will be held accountable for repaying all bursary costs incurred in terms of the bursary contract.

11.4 Repeated courses/modules

- (i) Bursary funds must be used for studies as contractually agreed upon.
(ii) Any failed or uncompleted subject(s) will not be paid by the Department and will be the responsibility of the bursar to repeat such modules(s) at own cost.
(iii) The Department will not pay for any subject(s) changes as a result of such repetition.

11.5 Change of study direction

- (i) The awarded bursary should be pursued at all costs
(ii) A change in study direction will only be considered in exceptional cases approved by the Chairperson of the Bursary Committee.
(iii) Should such a request be unsuccessful, the bursar must pursue the original study direction or forfeit the opportunity to study and the bursary contract.
(iv) Failure to comply with this provision will result in breach of contract.

11.6 Progress

- (i) The continuation of the bursary is determined by the progress of the bursar towards obtaining the qualification
(ii) The costs incurred during the re-attendance of classes for supplementary examination purposes and rewriting of such examination will be at the bursar's own cost and no special leave will be granted.

- (iii) The bursar will repeat the modules(s) failed at own cost.
- (iv) The Department will allow the bursar to continue and pay for the subject(s) if he/she passes the failed subject(s) or the re-examination.

11.7 Withdrawal from study

A bursar will be withdrawn from studies if:

- (i) There is breach of contract regarding the postponement and abandonment of study.
- (ii) In the sole discretion of the
Failure to submit the signed bursary acceptance letter and /or proof of registration within one month after the bursary

12 CONTRACTUAL OBLIGATIONS

12.1 Official is bound in terms of the appropriate bursary agreement (Annexure G).

12.2 Where the bursary is awarded for studies to an employee:-

- (i) The bursary holder who undertakes part-time study will redeem the bursary by serving the department for at least one year after attaining the relevant qualifications.
- (ii) An employee who fails to complete the relevant qualification shall redeem any obligation in terms of the contract either through service, or repayment of the bursary amount, plus interest rate determined by the treasury.
- (iii) In the case of an official who studies or undergoes a training for short periods the Director-General may, as a precondition for providing assistance, require the official to enter into contract with the Department in terms of which he/she will serve the Department for commensurable period.
- (iv) The total period of study towards a qualification cannot be extended for more than two years, beyond the defined study period.

- (v) In the event of termination of service the Department of finance will be requested to refund pension benefits of the bursary to the Department in settlement/partial settlement of the bursaries debt.

13. BREACH OF CONTRACT

Breach of contract takes place when a bursary fails to comply with the conditions of his/her bursary contract and under the following circumstances:

- Resignation or termination of service.
- Cessation of studies
- Dismissed due to misconduct
- Discharged due to incapacity /ill health.
- Poor performance
- Failure to submit required results/reports/proof of payment.
- Bursar follows a course, which is not stipulated in the contract.
- A bursar changes institution or study direction without prior approval of the chairperson of the bursary committee.

14. STUDY LEAVE

14.1 Leave arrangements have to be approved before studies are embarked on in accordance with the relevant stipulations.

14.2 The following types of leave will be granted to the studying officials.

14.2.1 Examination

Special leave with full pay may be granted to officials for a number of days that he/she will sit for exams as well as one day prior the examination day for preparation *Proof* of the examination time table must be provided in order for one to qualify for special leave.

14.2.2 Leave (50/50 basis)

(i) Apart from special leave, study leave on the basis of one day's special leave with full pay for each day vacation leave with full pay may in certain circumstances be taken by an official in connection with his or her studies for the following reasons:

- for the preparation of the examination,
- for attending the compulsory lectures or seminars during working hours.

(ii) Proof that the attendance is compulsory must be produced upfront as well as confirmation of attendance by the institution.

(iii) Unpaid leave cannot be used for 50/50 leave.

(iv) Only leave accumulated or capped leave can be used for 50/50 study leave.

15 PAYMENT OF BURSARY

The payment of bursary is subject to:

- (i) the completion of the prescribed bursary a complete exposition of the subjects when are to be followed for each year of study.
- (ii) a complete exposition of the subjects when are to be followed for each year of study.
- (iii) a specified account and proof of registration from the relevant instruction submission of examination results.
- (iv) submission of examination results.
- (v) good performance or good results.
- (vi) if the bursar has paid the study fees himself/herself she or he can submit documentary proof thereof.

16. TAKING OVER OF BURSARY AND STUDY LOAN OBLIGATION

- 16.1 Take over of study obligation will be done in accordance to Treasury Authority SM 35/05/B of 3 May 2001.
- 16.2 The applicant must submit the relevant application form, proof of study loan and registration to the Sub-Directorate Training.
- 16.3 The Bursary Committee will determine the appropriateness of a qualification at the taking over of study obligations.
- 16.4 Every successful applicant must complete and sign a contract.
- 16.5 Irrespective of the amount of the study loan, only an amount equal to or less than the amount determined by Treasury may be taken over.

17 GENERAL MEASURES

- 17.1 Only serving officials in the public service qualify for the awarding of bursaries.
- 17.2 The various prescribed contracts are set out in Annexures. No deviation from the stipulations is allowed without written consent of the Department.
- 17.3 Where specific matters are not prescribed in the above agreements, the matter is regarded as regulated by the Public service Act, 2001 and other measures issued in terms thereof.
- 17.4 The extension of studies, recovering of monies, the ceding of rights, the waving of debts to any extent and the taking over of obligations, rests with the Director-General and is, where applicable subject to treasury approval.

18. STUDIES ABROAD

Bursaries for studies abroad may be awarded to serving officials by the Minister, subject to the following:

- 18.1 the motivated request from the official provided that: the studies concerned cannot be undertaken at a local university;
- 18.2 a vacancy exist for which the envisaged qualification is a requirement for appointment or that an identified need exist for services of a person with such a qualification; and
- 18.3 it is impossible to fill such a post by transferring an official or appointing a candidate

Signed at *Pretoria* on this *27* day of *March* 2003


DIRECTOR-GENERAL: EDUCATION