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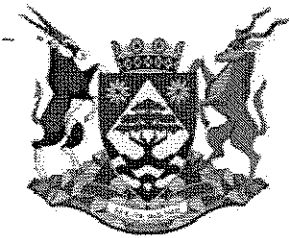
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Environment & Nature Conservation
NORTHERN CAPE PROVINCE
REPUBLIC OF SOUTH AFRICA

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DEPARTMENT OF ENVIRONMENT AND NATURE CONSERVATION

**POLICY ON STUDY AID
09 NOVEMBER 2011
HUMAN RESOURCE DEVELOPMENT UNIT
FINAL VERSION**

A PROSPEROUS AND EQUITABLE SOCIETY LIVING IN HARMONY WITH OUR NATURAL RESOURCES



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VERSION 2**

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1. CONCEPTUAL BACKGROUND

1.1 INTRODUCTION

The need for a clear and concise policy to regulate the granting of study aid and related matters, within this Department, has been identified.

In the past, the non-existence of such a policy has created a situation where no clear guidelines on the implementation and administration of study aid measures have been available. This, amongst other things, has caused much uncertainty regarding the correct study aid application procedures to be followed as well as the criteria upon decisions in this regard should be based. This has lead to the non-uniform implementation / utilization of this benefit which has made accountability in this regard, very difficult.

In other instances, the prescripts provide no guidelines on certain crucial matters, such as-

- the withdrawal of bursaries after such have been allocated;
- the recovery of bursary debts;
- the take-over of bursary debts; and
- the granting of permanent employment to prospective employees, who are granted bursaries.

This policy aims to provide measures for the effective rectification of the afore-mentioned problems/shortcomings, as well as others which have been created as a result of the non-existence of a policy

This policy, furthermore, has been developed in the spirit of the New Public Management Framework which primarily aims to accomplish the following-

- the enhancement of **service delivery** through the devolution of greater managerial autonomy, so that departmental practices / processes can be managed more effectively; and
- instill a greater sense of **accountability** at all levels within this Department.

Definitions

"Applicant"	means any person who has applied for study aid in terms of this policy.
"Competency"	means the ability to do the job required, when required to do so.
"CORE"	means the official "Code of Remuneration".
"Departmental"	means any person who has been granted



“Bursary holder”	a bursary for study purposes by this Department, and who has not yet fulfilled her/his obligation in terms thereof.
“Departmental study”	means any person who has been granted aid holder” study aid by this Department, and who has not yet fulfilled her/his obligation in terms thereof; and includes a Departmental bursary holder.
“Government Official”	means any person who is employed by a government department/organization other than this Department.
“Head of Department”	means the incumbent of the post “Head: Department of Tourism, Environment and Conservation (Northern Cape Provincial Government)”, and includes any person acting in such post.
“Local media”	means a newspaper(s) released within the borders of the Northern Cape Province.
“Long term”	in relation to the departmental competency gap analysis, means a period spanning over 3 or 4 consecutive financial years, or such period as may be determined, commencing on 1 April of the first year and concluding on 31 March of the final year.
“MEC”	means the Member of the Executive Council, Department of Tourism, Environment and Conservation, Northern Cape.
“Minor”	in relation to an applicant, means an applicant who is younger than 21 years of age.
“Pre-tertiary”	means study at school levels of grade 10, 11 and 12.
“Professional”	in relation to a field of study, means a field of study in respect of which a bursary holder, on/ after acquisition of her/his qualification and as a prerequisite for her/his practice in such field, is required to register with an appropriate Council in South Africa.
“Prospective official”	means a person who is not in the employ of any Government department/Organization/Institute; applies for the granting of study aid in the form of a bursary; may be granted such; and as a result thereof, in future on acquisition of her/his qualification, may be employed by this Department.
“Serving official”	means a person employed by this Department- in terms of the Public Service Act, 1994 (Act 103 of 1994), as amended, on a permanent basis or on probation and in a full-time capacity.
“Technical”	in relation to a field of study, means a field (qualification) which is required by the present / future incumbent of a post which is classified by the CORE as being a Technical Occupation; or where the duties attached to such post, are of a Technical nature.
“This Department”	means the Department of Tourism, Environment and Conservation (Northern Cape Provincial Government)

1.2 LEGISLATIVE REQUIREMENTS

- Public Service Act, 1994 (Act 103 of 1994), as amended;
- Public Service Regulations, 2001; and
- Employment Equity Act, 1998 (Act 55 of 1998)
- Labour Relations Act, 1995
- Basic Conditions of Employment Act
- Skills Development Act
- National Skills Development Strategy
- Human Resource Development Strategy for the Public Service

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2. POLICY STATEMENT AND APPLICATION SCOPE

2.1 POLICY STATEMENT

The aim of this policy is to:

- ensure that competency is built amongst serving/prospective officials, in order to meet current and future Departmental **service delivery** requirements;
- provide a **uniform approach** towards the implementation and administration of study aid measures;
- ensure the **uniform application and utilization** of study aid measures;
- ensure **accountability** in the granting of study aid; and
- **minimize** the **cost** that is incurred by this Department as a result of financial **wastage** in this respect.

2.2 GENERAL MEASURES

2.2.1 Study aid grant practices shall be-

- fair / equitable;
- accessible;
- transparent; and
- accountable.

2.2.2 Study aid grant practices shall-

- promote the building of the required competencies within the Department; in order to achieve strategic objectives;
- promote the achieving / maintaining of equitable employment practices too as large an extent as possible; and
- prevent financial waste and inefficiency.

2.3 DEPARTMENTAL COMPETENCY GAP ANALYSIS

2.3.1 A long-term departmental competency gap analysis shall be undertaken by the Division: Human Resource Development-

- on an annual basis; and
- before commencement of each subsequent bursary allocation cycle.

2.3.2 This analysis shall identify-

- crucial service delivery areas in which bursaries should be granted in order to build competency in such, based upon the Department's current and future service delivery requirements as well as;



- in relation to the sub-paragraph above, the Department's need to promote / maintain representivity.

2.3.3 The information gathered during the analysis will serve as basis for determining priority fields of study in which bursaries should be granted.

2.4 ADVERTISING

2.4.1 Internal advertising

On commencement of each annual bursary allocation cycle, the Division: Human Resource Development, shall-

- (a) announce the commencement of the cycle by way of posting advertisements to this effect within every workstation attached to this Department, in order to allow serving officials equal opportunity to apply; and
- (b) indicate in such advertisement the-
 - (i) application process which needs to be followed where officials want to request the granting of bursaries as well as the extension of duration of study periods in respect of bursary holders;
 - (ii) closing date for the submission of bursary applications; and
 - (iii) the criteria to be applied in allocating bursaries.

2.4.2 External advertising

Should the need exist, the availability of bursaries may be advertised externally, by way of the placement of an advertisement in this regard, in-

- (a) a maximum of two local media; and
- (b) poster form.

The media in which an advertisement shall be placed, shall be-

- (a) selected by the Head of the Directorate Corporate Services, with due regard to the applicant pool required to be targeted; and
- (b) arranged by the Sub-directorate Human Resources.

In relation to the sub-paragraph above, an advertisement shall-

- (a) be placed in the appropriate language(s);
- (b) have the same content; and
- (c) run concurrently.

Such advert shall indicate the-

- (a) field(s) of study to which preference shall be given during the bursary allocation process;

- (b) name of a departmental contact person;
- (c) telephone number and address of the relevant contact person;
- (d) closing date for applications; and
- (e) fact that this Department endeavors to promote/maintain employment equity by utilizing the Bursary Scheme as a tool.

2.5 A member of Bursary Committee contemplated at Section 8 of this policy, shall-

- 2.5.1 serve as member of such Committee in an unbiased and impartial manner;
- 2.5.2 not unfairly discriminate against any applicant on account of race, gender, ethnic or social origin, colour, sexual orientation, age, disability, religion, political persuasion, conscience, belief, culture or language;
- 2.5.3 not abuse her/his position as Committee member to promote or prejudice the interest of any applicant;
- 2.5.4 refrain from favoring relatives and friends in her/his activities as Committee member;
- 2.5.5 not abuse her/his authority or influence another Committee member, nor is influenced to abuse her/his authority;
- 2.5.6 deal fairly, professionally and equitably with applications and be punctual in the execution of her/his duty as Committee member;
- 2.5.7 execute her/his duty as Committee member in a professional and competent manner;
- 2.5.8 report to the appropriate authorities any fraud, corruption, nepotism, mal-administration or any other act which constitutes an offence, or which is prejudicial to the interests of applicants;
- 2.5.9 behave in a manner that enhances the reputation of the Committee;
- 2.5.10 not use her/his position as Committee member to obtain private gifts or benefits for her/himself;
- 2.5.11 not accept any gifts or benefits when offered these, as these may be construed as bribes; and/or
- 2.5.12 not use or disclose any official information for personal gain or the gain of others.

2.6 The HOD, in consultation with the Training Committee, may grant bursaries on an annual basis to serving and prospective officials, within the-

- 2.6.1 framework of this policy; and

2.6.2 with due regard to the study aid expenditure and allocation framework contemplated at paragraph 6.2.1.2 (ii).

3. STUDY AID GRANT CATEGORIES

Study aid may be granted for purposes of:

3.1 Study, in the form of a bursary grant, to-

3.1.1 a serving official (as defined)- who wishes to equip her/himself with knowledge and skills in order to be able to satisfy this Department's present and future service delivery requirements; by way of part-time study at a FET/HET level; through a recognized and accredited educational institution within the borders of South Africa.

3.1.2 a prospective official (as defined), who-

- is a South African Citizen;
- is of good character;
- in as far as her/his health is concerned, complies with such requirements as may be prescribed for appointment purposes;
- If she/he previously was employed within the public sector-
 - (a) did not terminate her/his service on the condition that she/ he would not accept or seek re-employment;
 - (b) the original grounds for termination of service did not militate against re-employment; or
 - (c) if she/he left the public sector due to ill health, can provide recent and conclusive evidence of recovery; and
- wishes to equip her/himself with knowledge and skills in order to be able to satisfy this Department's present and future service delivery requirements; by way of full-time study at a HET level; at a recognized and accredited educational institution within the borders of the Republic of South Africa; in a field of study which is key to this Department's core business; and wherein a scarcity of skills exist in such field, both within this Department and the open labour market.

3.2 Recruitment

3.2.1 **in the form of a study loan/study debt take-over** to a new appointee who is in possession of a tertiary qualification; which she/he acquired by any means other than by way of the granting of a bursary by any Government Department/Organisation/Institution; at/through recognised and accredited educational institutions; in a field of study which is key to this Department's core business and in which a scarcity of skills exists both within this Department as well as the open labour market; and in respect of which she/he still has an outstanding financial obligation; or



3.2.2 **in the form of a bursary take-over to a government official-** who is transferred to this Department and, at the time of her/his transfer is the holder of a bursary granted by another Government Department / Organization/Institution; in respect of which the qualification for which the bursary was granted, has not yet been acquired.

3.3 Extension in the duration of study period for which a bursary has been granted, to-

3.3.1 a **departmental bursary holder** (as defined)- where circumstances, at the discretion of the approving authority, justify the granting of an extension, limited to a maximum extension of 1 year in excess of the duration of study period for which the bursary was granted.

3.4 **Wavering of a study aid obligation, to-**

3.4.1 a **departmental study aid holder** (as defined)- in circumstances where she/he is not able to fulfil her/his study aid obligation may be exempted from her/his study aid obligation:

- in the event of her/his death or in an employer initiated retrenchment, automatically; or
- in the event of her/his becoming incapacitated by any mental or physical disability, or for any other justifiable reason, at the discretion of the relevant approving authority; on condition that the conditions of Section 15 had not already taken effect.

4. PROCEDURE TO BE FOLLOWED WHEN APPLYING FOR STUDY AID

In order to be considered for the granting of study aid, the following application procedure(s) shall be complied with in full, and within the relevant submission time-frame:

4.1 Requests for the granting of bursaries for study purposes

4.1.1 Application shall be made by way of the full completion of-

- the official bursary application form; and
- in the case of an prospective official, a sworn declaration that he/she is not in receipt of another government bursary; and

4.1.2 the attachment thereto of a certified copy of the applicant's-

- identity document;
- highest educational qualification certificate(s), or where such certificate(s) being awaited, a certified copy of her/his statement(s) of results which confirm completion of her/his highest educational qualification;
- written confirmation from the Educational Institutional at/ through which she/he wishes to enroll, of the-
 - (a) field of study (course/qualification) for which she/he wishes to enroll;



- (b) latest date of registration;
- (c) the capacity in which she/he wishes to enroll (thus, full-time or part-time);
- (d) based upon the capacity in which she/he wishes to enroll, the recommended **minimum** duration period of her/his studies in completion of the relevant course;
- (e) total estimated cost (including envisaged annual cost increases) of the course projected over the recommended.
- (f) minimum duration period, specifying annual registration, tuition, examination and study guide fees; as well as

- **in the case of prospective officials-**

- (a) who are scholars or have just concluded scholarship, a testimonial from her/his School Principal; and
- (b) who require accommodation expenditure to be covered by the bursary grant-

- (i) motivation in writing, in full by the applicant; and
- (ii) supported by written confirmation from the relevant

Educational Institution, as to the-

- fact the applicant's request for residence on its premises has been accepted; as well as
- total cost, including food, per annum for such residence; and

4.1.3 the submission thereof, to the Sub-directorate: Sub Directorate Human Resources.

4.1.4 Where an applicant is a minor at the time of her/his applying, her/ his legal guardian shall counter-sign her/his bursary application form.

4.1.5 Where a serving official wishes to apply for a bursary, he/she, once her/his bursary application form complies in full with contents of sub-paragraphs 4.1.1 and 4.1.2 above, shall submit such to her/his direct supervisor for a recommendation in relation to the granting of a bursary to her/him.

4.1.6 A supervisor's recommendation shall be based upon-

- (a) the relevance of the applicant's envisaged study field to her/ his current job description;
- (b) the relevance of the applicant's envisaged study field to her/ his future career path within this Department; as well as
- (c) the applicant's proven job performance and general conduct;
 - be motivated in writing; and
 - be attached to the applicant's bursary application form.

- 4.1.7 A supervisor's recommendation shall be forwarded, via the official communication channels, to the Director attached to the Directorate in which the applicant presides, for such Director to make a recommendation; where-after she/he shall arrange for the bursary application form to be submitted to the Sub-directorate:Human Resources for screening.

4.2 Requests for the take-over of study loans/debt

- 4.2.1 Application shall be made by way of-

- written motivation to this effect, in full, by the loan holder/debtor;
- substantiation thereof by way of the attachment thereto, of-
 - (a) a certified copy of the loan holder's/debtor's qualification certificate for which the loan was granted/debt was incurred, as well as her/his most recent loan/debt balance statement; and
 - (b) a written recommendation in this regard, from her/his immediate supervisor and her/his Director; and
- submission of the documentation required above, to the Sub-directorate:Human Resources, within 30 days of her/his date of assumption of duty.

4.3 Requests for the take-over of bursaries of government officials

- 4.3.1 Application shall be made by way of-

- written motivation to this effect, in full, by the Government Department/Organisation/Institution who granted the bursary;
- attachment thereto, of all required information pertaining to the bursary grant; and
- submission of the documentation required above, to the Sub-directorate: Human Resources, at the time of the official's transfer.

4.4 Requests for the extension of duration of study periods

- 4.4.1 Application shall be made by way of-

- written motivation to this effect, in full, by the bursary holder;
- the attachment thereto, of a written recommendation in this regard, from her/his immediate supervisor and her/his Director; and
- submission of the documentation required above, to the Sub-directorate: Human Resources, within the prescribed time-frame.

4.5 Requests for the wavering of bursary obligations



4.5.1 Application shall be made by way of-

- written motivation to this effect, in full, by the bursary holder or her/his immediate supervisor (in the event of death or incapacitation by any mental or physical disability);
- substantiation thereof by way of the attachment thereto, of-
 - written evidence; and
 - a written recommendation in this regard, from her/his immediate supervisor and her/his immediate supervisor's next level manager via the relevant Director; and
- submission of the documentation required above, to the Sub-directorate: Human Resources, within 30 days of the circumstances which necessitate the wavering of the bursary obligation, arising.

5. CIRCUMSTANCES UNDER WHICH STUDY AID AUTOMATICALLY SHALL NOT BE GRANTED

- 5.1 Requests that do not comply with all the requirements of Sections 3 and 4 of this policy, shall not be considered for the granting of study aid.
- 5.2 Bursaries for full-time study may not be granted to serving officials except where so recommended by the Training Committee and such specific needs identified as critical within the Departments' Strategic Plan.
- 5.3 Bursaries for part-time study may not be granted to prospective officials.
- 5.4 Only in exceptional circumstances shall any request for a bursary grant for the acquisition of a MBA or Doctorate in any discipline, be considered.
- 5.5 Bursaries for study at/through Educational Institutions, shall not be granted if such Education Institutions are-
 - 5.5.1 situated outside of the borders of the Republic of South Africa; and/ or
 - 5.5.2 are not classified as "recognised and accredited educational institutions".

6. STUDY AID EXPENDITURE AND ALLOCATION FRAMEWORK

6.1 Budget

- 6.1.1 The Head of Department, on an annual basis, shall determine the amount to be utilized for study aid purposes during the relevant financial year, inclusive or exclusive of the statutory amount to be set aside in terms of the Skills Development Levies Act.



6.2 Allocation of budgeted amount

6.2.1 The amount referred to in sub-paragraph 6.1.1 above, shall be utilised as follows:

- The actual amount required to **maintain** bursaries, which were granted during previous financial years and remain effective during the relevant financial year, shall be allocated for this purpose.
- (a) On completion of allocation of funds referred to in the sub-paragraph above, the remaining funds shall be sub-allocated as follows-
- (b) pre-tertiary study: an amount not exceeding a maximum of of the remaining funds shall be allocated for the granting of bursaries for studies of this nature. Within this framework, every applicant who complies with the application requirements, as far as possible, shall be granted a bursary; and
- (c) tertiary study: as a guideline-
- (i) of the balance be allocated to the obtainment of bursaries in the professional/technical fields of study;
 - (ii) of the balance be allocated to the obtainment of bursaries for first HET qualification applications.
 - (iii) of the balance should be allocated to the obtainment of bursaries in further HET qualifications/ fields of study;
 - (iv) the granting of bursaries within the above-mentioned framework, shall-
 - be guided by the need within the Department as a whole;
 - be distributed as evenly as possible between all Directorates attached to this Department; and
 - include the granting of bursaries to serving- and prospective officials (where the need to grant bursaries to prospective officials exists).

6.3 Bursary amounts

6.3.1 Bursary grants, as a minimum, shall cover-

- actual annual study fees (tuition, examination and registration);



- prescribed study guides which apply to the relevant field of study as determined by the Educational Institution at/through which the applicant envisages to enroll; and
- an amount to be reviewed by the HOD on an annual basis, for the purchasing of necessary study material, other than the study guides referred to in the sub-paragraph above; subject to the submission of specified receipts and/or specified quotes.

6.4 DURATION OF STUDY PERIODS

6.4.1 The period for which bursaries shall be granted shall be based on:

- the minimum prescribed/recommended duration of the course as applicable to full-time or part-time study; or
- the minimum remaining duration of the course in cases where a person has already completed a part of her/his course.

6.5 Accommodation expenditure

6.5.1 Where full-time study is undertaken, accommodation expenditure may be covered by the bursary grant in circumstances where-

- an applicant's proven social circumstances necessitate such; and
- if such accommodation is not acquired, the successful acquisition of her/his qualification will be hampered; and
- she/he, beyond all reasonable doubt, cannot afford to acquire accommodation for her/himself; or
- if she/he is a minor, her/his legal guardian beyond reasonable cannot afford to acquire accommodation for her/ him.

6.5.2 Accommodation expenditure shall-

- be paid in respect of accommodation situated on the premises of the Educational Institution at which the applicant shall pursue her/his studies only; and
- include food

6.5.3 The amount paid in respect of accommodation expenditure shall-



- be based upon the quotation received from the relevant Educational Institution; limited to a maximum amount which is to be determined by the HOD on an annual basis, per student, per annum; and
- be paid in quarterly amounts, directly to the relevant Educational Institution.

6.6 Payment of bursary monies.

6.6.1 Payment of any/all bursary money (ies) shall only be made on receipt of the following by the Sub-directorate: Human Resources-

- all applications and/or other documentation required in terms of this policy;
- the applicant's duly completed and signed bursary contract agreement; and/or
- proof of registration, obtained from the relevant Educational Institution.

6.6.2 Under no circumstances shall any money (ies) be paid in respect of subjects, which have been failed, and/or any part thereof.

6.6.3 Payment for further subjects shall only be made once proof of registration, at own cost, for subjects that previously have been failed, has been submitted by the applicant, to the Sub-directorate: Human Resources.

6.6.4 Payment of actual annual study fees and prescribed study guides shall be made directly to the relevant Educational Institution.

6.6.5 Payment for necessary study material (other than prescribed study guides) shall be made directly to the –

- bursary holder, in the event of her/him submitting a receipt(s) to the effect; and
- service provider, in the event of the bursary holder submitting a quotation(s).

6.6.6 Payment for accommodation expenditure shall be made directly to the Educational Institution.

6.6.7 Payment for study loan/debt take-overs shall be made-

- in terms of the relevant financial directives governing loan/ debt take-overs; and
- directly to the relevant Educational Institution, Bank or Lawyer.

7 SCREENING OF REQUESTS FOR STUDY AID

7.1 The Sub-directorate:Human Resources, in conjunction with the Director: Corporate Services, will screen all requests for study aid, in order to-

- 7.1.1 ensure that such requests comply with the requirements of Sections 3 and 4 of this policy; and
- 7.1.2 make recommendations to the role-players, and on the basis of the criteria indicated at paragraphs 7.4 to 7.8 below, on each request.
- 7.2 During the screening process prospective officials, who comply with all the application requirements, shall be subject to a reference check and qualification verification.
- 7.3 The findings of the reference check shall be-
- documented; and
 - attached to the relevant applicant's application.
- 7.4 **Requests for the granting of bursaries for study purposes**
- 7.4.1 The recommendation shall be forwarded to the Bursary Committee for selection, and shall be based upon the-
- applicant's proven academic history; and
 - in the case of a serving official, the-
 - (a) recommendation received from the applicant's Supervisor/ Director;
 - (b) duration of the applicant's envisaged field of study as well as the possibility of maintaining the bursary grant for the duration thereof, should such be granted;
 - in the case of a prospective official, the-
 - (a) findings of the applicant's reference check and qualification verification;
 - (b) relevance of the applicant's envisaged field of study to the Department's core business;
 - (c) duration of the applicant's envisaged field of study as well as the possibility of maintaining the bursary grant for the duration thereof, should such be granted;
 - (d) availability of posts in an occupational class directly related to the applicant's envisaged field of study;
 - (e) applicant's suitability for employment in an occupational class related to her/his envisaged field of study;
 - (f) availability of skill in the open labour market in an occupational class in which the applicant could/should be absorbed on obtaining the qualification which she/he envisages to enroll for; and
 - need for the Department to promote/maintain employment equity.
- 7.5 **Requests for the take over of study loans/debt**
- 7.5.1 The recommendation shall be forwarded to the relevant approving authority contemplated at paragraph 1.5.3 above, and shall be based upon the-



- the criteria indicated at paragraph 3.2.1 above.

7.6 Requests for bursary take-overs of government officials

7.6.1 The recommendation shall be forwarded to the relevant approving authority contemplated at paragraph 1.5.4 above, and shall be based upon the-

- justifiability of the request.

7.7 Requests for the extension of duration of studies

7.7.1 The recommendation shall be forwarded to the Bursary Committee, and shall be based upon the-

- justifiability of the request.

7.8 Requests for the wavering of bursary debt

7.8.1 The recommendation shall be forwarded to the HOD, and shall be based upon the-

- justifiability of the request.

7.9 In respect of the nature of requests indicated at sub-paragraph 7.4 above, the Sub-directorate: Human Resources will furnish the Bursary Committee with the following information, which shall be used as the basis for selection-

- funds allocated for the granting of bursaries; and
- findings of the Departmental Competency Gap Analysis; as well as
- all applications which comply with the application requirements, together with its recommendation on each.

7.10 Furthermore, where the Sub-directorate: Human Resources deems necessary that the Bursary Committee review the continuation of a bursary which previously was allocated, as a result of poor progress which the bursary holder is making, or for any reason it may regard as being justifiable (such as, the relevance of a bursary holder's field of study to the Department's core business), a recommendation in this regard will also be submitted to the Bursary Committee.

8 SELECTION

8.1 A Training Committee, consisting of the incumbents of the following posts, shall be constituted:

- Director: Corporate Services (Chairperson);
- Deputy Director: Human Resources;
- Chief Financial Officer or nominee;
- Director: Tourism or nominee;
- Director: Conservation or nominee;
- Director: Environment or nominee
- Assistant Manager: Human Resource Development

- Officials attached to Human Resources who will serve as Scribe and/or support personnel; and
 - One member each of Representative Unions within the Department.
- 8.3 The Training Committee shall sit as required or deemed necessary, to:
- 8.3.1 consider-
- requests for the granting of bursaries for study purposes to applicants;
 - requests for the extension of duration of study periods of bursary holders; as well as
 - the continuation of bursary grants; and
- 8.3.2 make recommendations to the approving authority contemplated at paragraph 1.5.1 above, in this regard.
- 8.4 An official attached to the Sub-directorate: Human Resources shall-
- 8.4.1 provide secretarial services during the Committee's proceedings, but shall not form part of the Training Committee;
- 8.4.2 keep comprehensive minutes of all decisions taken by the Committee with regard to the requests of each applicant as well as the continuation of bursary grants; and
- 8.4.3 prepare the written recommendations of the Committee, for submission to the approving authority.
- 8.5 The Training Committee shall consider the requests and make recommendations in this regard, after considering only-
- 8.5.1 the expenditure and allocation framework contemplated at Section 6 of this policy; and
- 8.5.2 the Sub-directorate: Human Resources' recommendation.
- 8.6 In relation to requests for the granting of bursaries, preference shall be given to serving officials-
- 8.6.1 on salary level 12 and/or lower grading;
- 8.6.2 who envisage to obtain their first qualifications at a minimum value of NQF level 5 (RVQ 13) through the allocation of a bursary; and/or
- 8.6.3 whose further education will add considerable value to improvement of the Department's service delivery.
- 8.7 With due regard to the fact that applicants should be encouraged to further their studies in a vertical direction, rather than branching out in a horizontal direction, applications for post-graduate qualifications should be prioritized as follows:
- 8.7.1 NQF level 6 in the same discipline.
- 8.7.2 Master's degree in the same discipline, based upon post requirements /job content.
- 8.7.3 A horizontal qualification in another discipline, provided that it has direct relevance to the relevant post requirements/job content.
- 8.8 Bursaries shall not be granted for the acquisition of MBA's, or Doctorates in any field of study except where circumstances so dictate and funds allow;

- 8.9 The written recommendation of the Training Committee shall be submitted to the relevant approving authority, no later than 10 working days after the selection process has been concluded, and shall be accompanied by-
- 8.9.1 an indication of the funds available for the granting of new bursaries;
 - 8.9.2 the findings of the departmental competency gap analysis; and
 - 8.9.3 all requests, together with the Training Committee's recommendation on each.
- 8.9 Should the Committee not be able to reach consensus on the granting of a bursary to any applicant, the relevant approving authority shall make a decision in this regard.

9. APPROVAL / DISAPPROVAL

- 9.1 The approval/disapproval of study aid requests shall be done-
- 9.1.1 by the relevant approving authorities indicated at paragraph 1.5 above; and
 - 9.1.2 in writing.
- 9.2 Where the approving authority deviates from the submitted recommendation, she/he shall record the reasons for the deviation in writing.

10 INFORMING SUCCESSFUL/UNSUCCESSFUL APPLICANTS

- 10.1 Within 2 working days of receiving the written approval/disapproval of study aid requests from the relevant approving authority, the Sub-directorate: Human Resources shall inform-
- 10.1.1 successful applicants thereof, by way of written confirmation of such, subject to compliance with any prerequisites; and
 - 10.1.2 unsuccessful candidates of such, in the format of an official regret letter.

11. ACCEPTANCE OF APPROVED BURSARY GRANTS.

- 11.1 Where a request for a bursary grant for study purposes has been approved, the bursary grant shall be accepted/rejected (in writing) by a successful applicant, within 20 working days of being informed of her/his successful application.
- 11.2 Should the applicant contemplated in paragraph 11.1 above, not indicate her/his acceptance/rejection of the bursary grant within the above-mentioned time-frame, the grant, on commencement of the 21st working day, will be withdrawn.
- 11.3 In the event of the circumstances contemplated at sub-paragraph 11.2 prevailing, the conditions of paragraph 12.3 apply *mutatis mutandis*.



12 REGISTRATION AT EDUCATIONAL INSTITUTIONS

12.1 An applicant to whom a bursary has been granted for study purposes shall, on an annual basis, before her/his final date of registration for the relevant year, be required to take up her/his studies by way of-

12.1.1 registering at/ through the relevant Educational Institution, for study for such year; and

12.1.2 submitting proof of her/his registration to Sub-directorate: Human Resources, within 30 days of her/his final date of registration.

12.2 Should the conditions of sub-paragraph 12.1 not be complied with, the bursary holder will be deemed to have abandoned her/his studies and her/his bursary grant, as a result thereof, will be withdrawn with immediate effect.

12.3 Should an applicant who falls within the category contemplated in paragraph 12.2 above, wish to re-apply for her/his bursary grant;

12.3.1 she/he will be required to wait until the subsequent bursary cycle has commenced; and

12.3.2 re-apply by way of following/meeting the prescribed application procedures/criteria;

12.3.3 in which event, her/his application shall be regarded and dealt with as a new bursary grant request.

13. CONTRACTUAL BINDING

13.1 Where a bursary is granted for pre-tertiary study, such bursary holder shall not be bound contractually.

13.2 Where a bursary is granted for tertiary study, such bursary holder shall be bound contractually; in terms of which she/he will be required to redeem her/his obligation to the Department as a result thereof, through the rendering of actual service.

13.3 Where government officials who transfer to this Department, on transfer are bursary holders, their contractual binding in terms of which the bursary was granted at their previous Departments/Organizations/Institutions, shall remain in effect.

13.4 Where a study loan/debt take-over is granted, the loan holder/ debtor shall be required to enter into a contractual agreement with this Department, with effect from the effective date of take-over; in terms of which she/he will be required to redeem her/his obligation to the Department as a result thereof, through the rendering of actual service.

14. REDEMPTION OF BURSARY OBLIGATIONS



14.1 A bursary holder who is granted a bursary for tertiary study, shall-

14.1.1 in the case of a bursary holder who undertakes full-time study-redeem her/his obligation to the Department as a result thereof; by serving the Department, or any Department which this Department may deem appropriate; on the basis of one year for each year of study or any part thereof; on acquisition of the qualification for which the bursary was granted, or registration within her/his profession where such is a prerequisite; and

14.1.2 **in the case of a bursary holder who undertakes part-time study-**redeem her/his obligation to this Department as a result thereof; by serving this Department, or any Department which this Department may deem appropriate; on the basis of one year for each year of study or any part thereof; on acquisition of the qualification for which the bursary was granted.

14.2 An official to whom a study loan/debt take-over has been granted, shall- redeem her/his obligation to this Department as a result thereof; by serving this Department, or any Department which this Department may deem appropriate on the basis of one month for each month of study in respect of which the official had an outstanding financial obligation (excluding any interest on the amount), which this Department settled; calculated in accordance with the following formula:

A= Proven original amount of study loan taken/debt incurred by the official, in acquisition of her/his qualification, excluding any interest.

B= Minimum prescribed duration/minimum remaining duration of the course as determined by the Educational Institution at/through which the official acquired her/his qualification, applicable to the capacity (full-time/part-time) in which the qualification was acquired.

C= Average debt for study purposes, incurred by the official per annum based upon the minimum prescribed duration of the course as determined by the relevant Educational Institution.

D= Average debt for study purposes, incurred by the official per month based upon the minimum prescribed duration/minimum remaining duration of the course as determined by the relevant Educational Institution.

E= The official's outstanding financial obligation (excluding any interest), settled by this Department.

12= number of months per annum.

F= Redemption period, rounded up to the next higher month where a decimal occurs.

$\frac{A \times C}{12} = \frac{E}{F}$

- 14.3 A bursary holder who undertakes full-time study, shall commence serving this Department, or any Department which this Department may deem appropriate, within 90 days of her/him-
- 14.3.1 meeting the requirements for the acquisition of the qualification for which the bursary was granted; or
- 14.3.2 registering for her/his profession, where required.
- 14.4 A bursary holder who is required to register within her/his profession, shall so apply within 30 days of her/him meeting the requirements for registration.
- 14.5 A bursary holder who is required to undergo experiential training as may be prescribed by the Educational Institution at which she/he is enrolled; in order to acquire the qualification for which her/his bursary was granted; or as may be required for the purpose of registering in her/his particular profession; shall undergo such training within this Department, or within any Department which this Department may deem appropriate, and shall be required to complete it successfully within the prescribed period. The service rendered during such period of training, shall not count towards service in redemption of her/his bursary obligation.
- 14.6 In cases where a bursary holder has just completed her/his studies and, for justifiable reasons, cannot be suitably absorbed within this Department, everything possible shall be done to accommodate her/ him elsewhere in the public sector. In such instances, the recipient Department shall be provided with all the particulars pertaining to the bursary holder's obligations in order to ensure that she/he fully redeems her/his obligations towards the State.
- 14.7 Where it is not possible to suitably accommodate the bursary holder within the Department or elsewhere in the public sector, she/he shall be placed on an employment waiting list for a maximum duration of 6 consecutive calendar months; measured from the date of notifying this Department of her/his acquisition of her/his qualification; and shall receive employment preference when suitable vacancies for her/ his absorption within the Department are made available; in which event, she/he, at her/his time of appointment, he will be required to redeem only the part of the service period which would have been remaining, had she/he been suitably absorbed within this Department directly on completion of her/his studies.
- 14.8 Should the bursary holder, during the period contemplated at sub-paragraph 14.7 above, not be suitably absorbed within this Department, she/he, on conclusion of the relevant period, shall be exempted from her/his obligations in terms thereof.



15 RECOVERY OF STUDY AID DEBT

15.1 Where a departmental study aid holder contravenes any undertaking/condition contained in her/his study aid contract agreement-

15.1.1 she/he shall be deemed to have breached such contract; and

15.1.2 as a result thereof, shall reimburse this Department with all expenditure incurred by Government in respect of her/his studies, unto and including the date of breach of contract.

15.2 The recovery of study aid debt shall be managed in compliance with the relevant financial directives regulating the recovery of departmental debt as well as her/his contractual stipulations.

APPLICATION SCOPE

This policy applies to all persons who apply for / are granted, study aid by this Department, in the forms of:

- Bursaries for study purposes (or any part thereof).
- Study loan / debt take-overs.
- Bursary take-overs.



3. POLICY FRAMEWORK

3.1 IDENTIFICATION AND CONSULTATION OF STAKEHOLDERS

This policy does is a revision of the version 1 policy signed in 2005. Therefore no stakeholders were consulted because all of the benchmarking of version 1.

3.2 TIMEFRAMES

This policy was analysed and aligned by the Legislative Development unit on November 08, 2011. This policy was further modified by incorporating the Departmental letterhead on November 10, 2011.

3.3 IMPLEMENTATION STRATEGY

- Each unit must allocate part of their budget towards aiding the further study of its staff complement to empower them to function effectively
- Bursary applications should be done through the supervisors
- The HR unit is responsible for the advertising (internally/ externally) of bursaries
- The Training Committee will make recommendations to the Head of department on approval/disapproval
- Bursaries should be approved/ disapprove by the Head of Department

The implementation date for this policy is 1 December 2011

3.4 FINANCIAL IMPLICATIONS

The operational implications for this policy will be carried by all units in cooperation with Human Resource Development unit.

3.5 COMMUNICATION

- The communication channels apply

3.6 COMPLIANCE, MONITORING AND EVALUATION (M&E)

3.6.1 APPROVING AUTHORITY

3.6.1.1 The HOD, on recommendation from the Training Committee, shall approve/disapprove requests for the-

- Granting of bursaries for study purposes, to applicants;
- Extension of duration of study periods, of bursary holders; and
- Continuation of bursary grants, to bursary holders.

3.6.1.2 Treasury, on recommendation from the HOD, shall approve/disapprove requests for the waiving of study aid debt.



3.6.1.3 The relevant approving authority, given the authority to approve/ disapprove applications for employment in terms of this Department's Recruitment Policy, on recommendation from the Training Committee shall approve/disapprove requests for the take-over of study loans or study debt.

3.6.1.4 The Head of Department, on recommendation from the Training Committee, shall approve/disapprove requests for the take-over of bursaries of government officials.

3.6.2 DEVIATIONS FROM THIS POLICY

3.6.2.1 A request for the granting of study aid which constitutes a deviation from any measures contained in this policy, shall be approved by the Head of Department only.

3.6.2.2 Any application, which falls within the scope of paragraph 1.7.1 above, must be submitted fully motivated, in writing.

3.7 POLICY REVIEW

This policy will be reviewed when the need arises or in case of the occurrence of extenuating circumstances (political mitigation, or pronouncement by legislation and/ or regulations). The contact person for this policy will be required to submit all relevant information pertaining to this policy in conjunction with a signed memo with all amendments (addition or omission) during the third quarter annually.

The exception, the Policy development unit will be conducting all extenuating reviews throughout the year, therefore it is paramount that any new information received be submitted to this unit, in order to coordinate the review process of this policy.

3.8 POLICY IMPACT

The wish of this policy is to ensure that staff are assisted by the department to empower them, to conclude their mandated functions effectively and timeously.

3.9 INTERIM MEASURES

3.9.1 The department has been using the notes issued in terms of the PFMA. The Department has been

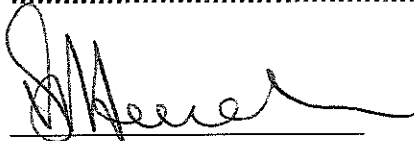
3.9.2 The department has been using the version 1 of this policy which was signed in 2005



4. **ADOPTION OF POLICY**

Approved / ~~Not Approved~~
Comments:

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.....
.....



D VAN HEERDEN
HEAD OF DEPARTMENT

2011109
DATE



