



Main Street  
Creighton, 3263

P.O Box 62

Creighton 3263

Phone: +27 39 833 1038

Fax: +27 39 833 1179

Email: [mailbox@ndz.gov.za](mailto:mailbox@ndz.gov.za)  
[www.ndz.gov.za](http://www.ndz.gov.za)

**A Better Place for All**

## **DR NKOSAZANA DLAMINI ZUMA LOCAL MUNICIPALITY**

### **INTERNAL BURSARY: POLICY**

<b>Date Approved:</b>	<b>21 MAY 2024</b>
<b>Effective Date:</b>	<b>2024-2025</b>

#### **1. PURPOSE**

To encourage and support employees who intend pursuing formal learning at accredited tertiary institutions in order to obtain qualifications in areas which are in line with Dr NDZ Local Municipality's core functions;

To support and address the Employment Equity (EE) and Affirmative Action (AA) initiatives of the Municipality as spelled out in the Employment Equity Plan.

#### **2. OBJECTIVES**

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

- 2.1.** develop the relevant skills and level of academic achievement of the Dr NDZ Local Municipality workforce
  - 2.1.1.** to improve the quality of life of workers, their career prospects and labour mobility, and to improve productivity;
- 2.2.** increase the levels of investment in education and training
- 2.3.** Encourage HOD's –
  - 2.3.1.** to facilitate active learning in the workplace, and

- 2.3.2. to provide employees with opportunities to acquire new skills and knowledge in the relevant field of work related to local government.
- 2.4. improve the advancement of previously disadvantaged employees;
- 2.5. meet the objectives determined by career paths;
- 2.6. establish a pool of suitable candidates in order to support, inter alia, the Succession Planning.

This policy applies only to bursaries granted to officials of the Municipality. It does not provide for bursaries to be granted to children of officials, or to councillors, or to third parties

### 3. DEFINITIONS

In this policy, unless the context indicates otherwise.

**"Municipality"** Dr Nkosazana Dlamini Zuma Municipality in the Harry Gwala District, KwaZulu Natal Province; South Africa

**"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

**"Council"** means the Dr Nkosazana Local Municipality Council

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

**"Bursar/Student"** means a person to whom a study bursary/aid is granted.

**"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

**"LGSETA"** means the Local Government Sector Education and Training Authority

**"Year"** Refers to an academic year of the higher institution of learning.

### 4. STATUTORY AUTHORISATION

- Skills Development Act, 97 1998
- Public Service Act, (Proclamation R175)1994
- Skills Development Levies Act No 9 of 1999
- Employment Equity Act No 55 of 1998
- South African Qualification Authority Act,58,1995
- Human Resource Development Strategy for the Public Service 2002- 2006
- National Qualification Framework
- White Paper on Transformation of the Public Service, May 1997
- White Paper on Public Service Training and education, Notice 1428 of 1998

- Provincial Growth & Development Strategy (PGDS).

## **5. ELIGIBILITY FOR BURSARY**

- 5.1.** Every permanent employee, fixed term contract employee, Municipal Manager and manager directly accountable to the Municipal Manager shall be eligible for a Bursary subject to the provisions of this policy.
- 5.2.** Priority shall be given to employees from designated groups in order to enhance skills development in terms of employment equity measures provided for in Dr NDZ Local Municipality's Employment Equity Plan/Policy

## **6. GENERAL CONDITIONS**

- 6.1.** An official of the Municipality will be eligible to apply for a bursary if the following criteria are met:
  - a)** he or she is a full-time official of the Municipality;
  - b)** he or she has been in the continuous employment of the Municipality for not less than 12 months;
  - c)** he/she enters into a bursary agreement with the municipality before he/she commences with the study;
  - d)** he or she meets the minimum registration requirements of the university, college or other educational institution ( "institution") at which he or she wishes to register;
  - e)** the field of study must be appropriate to the official's career path, and current job description, is based on the needs analysis, planned for in the WSP or must be appropriate to the development of other skills which are important to the municipality;
  - f)** the bursary can also be granted to an employee who does not fall within the category mentioned in (e) above on condition that a succession plan has been conducted and approved by the Municipal Manager or higher responsibility in the future;
  - g)** the study programme is accredited by the South African Qualification Authority (SAQA)
  - h)** an employee will be eligible for assistance only once during a financial year;
- 6.2.** Only applications from officials for assistance for part-time studies will be considered. Applications for assistance for full-time study will not be considered.

- 6.3.** Studies may only be followed at an accredited college or University situated within the Republic of South Africa as defined by relevant legislation.
- 6.4.** The bursary only covers one academic year of the course of study for which the applicant has registered. Study costs for the remaining year(s) of study will be paid by the municipality upon an application for continuation of studies by the official and bursary agreement as amended from time to time, or prevailing at that point in time, will apply.
- 6.5.** Where an official fails one or more subjects, a bursary will not be granted for the subject(s) to be retaken and will be for the Official's own account.
- 6.6.** A bursary will not be granted in order to write supplementary examinations for subjects or entry examinations for the course of study.
- 6.7.** The municipality reserves the right whether or not to allocate a bursary and amend the conditions of the bursary schemes.
- 6.8.** Priority will be given to first time applicants to allow for a fair chance for all employees. Employees that have been granted a bursary before will only be given a chance two years after the completion of the qualification previously funded by the Municipality unless there are no new applicants.

## **7. BUDGET**

- 7.1.** The annual training budget as well as grants received from **LGSETA** must provide for the training needs of the Municipality.
- 7.2.** Training courses and funding provided by the Provincial and National Departments of Local Government must also be accessed.
- 7.3.** The Human Resources section is responsible to make provision for study assistance under the respective departmental budget.

## **8. WITHDRAWAL OF FINANCIAL ASSISTANCE**

- 8.1.** Any Financial Assistance granted to an official will be withdrawn by the Municipal Manager where such official:
  - a) is refused permission by an institution to continue his/her studies;
  - b) breaches any provision of this Policy, or of the agreement referred to in 3.1;
  - c) fails to comply with any regulation and requirement of an institution relating to his or her studies or attendance;
  - d) is suspended by the institution for whatever reason;
  - e) terminates his or her employment or is terminated by the Municipality on the grounds of misconduct;

- f) is discovered to have utilised any leave granted to him or her for a purpose other than to attend lectures or classes or studying or for sitting examinations in connection with the approved course being undertaken by such official;
- g) ceases to attend his or her approved course without a reasonable or satisfactory explanation;
- h) fails to show satisfactory progress in his studies.

8.2. If Financial Assistance is withdrawn, the amount which has been paid on behalf of the official up to and including the date such cancellation shall immediately and unconditionally become due & payable by the official to the Municipality.

## **9. SERVICE OBLIGATION**

- 9.1.** An employee shall not leave the employment of Council during the academic year that they are funded for.
- 9.2.** An employee shall not leave the employment of Council for a period of three (3) years or the number of years studied, commencing on the first day of the month in which he/she obtains the qualification ( dismissed for misconduct)
- 9.3.** In the case of block releases an employee shall not leave the employment of Council for a period of one (1) year if special leave of up to and including twenty-six (26) weeks of the year was granted to attend classes or experiential training.
- 9.4.** -In the case of block releases in excess of twenty-six (26) weeks special leave granted to attend classes or experiential training, an employee shall not leave the employment of Council for a period of two (2) years.

## **10. SPECIAL LEAVE/SABBATICAL LEAVE/ PRACTICALS/BLOCK RELEASES/ ATTENDING OF CLASSES**

- 10.1.** An employee shall be granted special leave for compulsory contact session, block releases and experiential training (subject to proof).
- 10.2.** If the special leave that has been granted for study purposes is less than twenty-six (26) weeks per year, it shall be written off on a pro rata basis over a period of one (1) year. If special leave has been granted for more than twenty-six (26) weeks per year, the same principle shall apply but shall be written off on a pro rata basis over a period of two (2) years.
- 10.3.** Should an employee leave the service of Council before his/her leave debt has been written off – the remaining special leave days shall be written off against his/her accumulated leave where after the balance shall be paid out to the employee in cash, if applicable, and provided further that should insufficient accumulated leave be available, then in that case the employee shall refund the outstanding leave debt through pension pay-out.
- 10.4.** An employee shall be granted 2 days study leave(one day for preparation and one for the examination) per subject per annum.
- 10.5.** Study leave is limited to a maximum of 10 days per annum.

## **11. FAILURE TO COMPLETE STUDIES**

- 11.1.** Should an employee fail a subject, be refused permission to write a subject or did not sit for the exam of a specific subject which he/she was registered for, it shall be expected that he/she shall register for the same subject at his/her own cost in the following year and submit such proof. The employee will be permitted to continue with his/her studies and register for other modules to be funded by the Municipality however, the employee must ensure to complete his /her Diploma /Degree/ in record time.
- 11.2.** Should an employee fail to complete his/her studies within the applicable time frame as set by the institution, it shall be expected of the employee to pay back to Council all monies of subjects or courses failed/permission refused to write/exams not written. Subject(s) passed shall be calculated against a pro-rata period of one (1) year towards his/her service obligation.
- 11.3.** Any repayment back to Council due to failure of completion shall commence within that Financial year and or when the municipality becomes aware of such failure.
- 11.4.** If an employee failed a registered course/subject, provided that proof is given of re-registration for the subject/course, the amount shall be waived for a period for the completion of the subject or of one (1) year.

## **11 FAILURE TO COMPLETE SERVICE OBLIGATION**

- 11.1.** An employee resigning from the service of Council during the academic year that they are funded for or before his/her service obligation period has been completed will result in repayment on a pro rata basis. The amount owing shall be immediately payable or deducted from his/her salary and or leave encashment. The following calculation shall apply;
- 11.2.** 
$$\text{Number of Working days in a Year} / \text{Number of days served} = \% \text{ of the Amount owing}$$

## **12 GENERAL**

- 12.1** Council shall not assist employees with prescribed textbooks for registered subject/courses.
- 12.2** Study equipment shall be for the account of the employee.
- 12.3** Double registrations for different courses and/or registration at other institutions shall not be covered by this scheme.
- 12.4** Completion of diploma/degree/certificate shall not automatically lead to expectation of promotion or any kind of incentive by Council.
- 12.5** Council shall not pay for re-marking of papers.
- 12.6** All other costs such as travel, and subsistence allowance and accommodation shall be for the account of the employee.

### **13 LIMIT ON THE AMOUNT**

13.1 An amount of R40 000 per year, per employee shall be the limit in order to afford and guarantee access to a larger number of employees.

### **14 COUNCIL APPROVAL AND EFFECTIVE DATE**

Approval of Policy by Council and Effective date: -----



.....  
**MUNICIPAL MANAGER**

21 /05 /2024 .....

**DATE**

## APPLICATION FORM FOR A BURSARY: EMPLOYEES

2021/2022

**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:.....

Year:.....

Subjects/ modules (Year Applying For)	Cost
.....	.....
.....	.....
.....	.....
.....	.....
.....	.....

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

**Motivation:.....**

.....  
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.....

### 2. PERSONAL PARTICULARS

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

First names:.....

Employee No: .....



Identity No: .....

Position.....

Department.....

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 a 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**

<b>Completed</b>	<b>Terminated</b>	<b>In Progress</b>	
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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

5.

<b>FOR OFFICE USE – HOD / MANAGER / SUPERVISOR</b>	
<p><b>Application Recommended / Not Recommended</b></p> <p><b>Amount Recommended:.....</b></p> <p><b>COMMENTS</b></p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>.....</p> <p><b>DATE</b></p> </div> <div style="width: 45%;"> <p>.....</p> <p><b>SIGNATURE</b></p> </div> </div>	


<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>

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.....

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**MUNICIPAL MANAGER**

**Date**

## THE EMPLOYEE'S OBLIGATIONS

I, ... (full names & surname).....(I.D no) in  
 the .....department Voluntarily  
 undertake:

1. To follow the necessary course of study during the current year prescribed in respect of the above-mentioned qualification.
2. To give satisfactory proof of enrolment for the above-mentioned course of study.
3. To observe the rules of the above-mentioned tertiary institution.
4. To furnish the Council with a certified copy of my examination results in respect of any intermediate as well as annual examinations within a period of one month after such results have been released by the tertiary institution.
5. To serve the Council upon having obtained the abovementioned qualification for a minimum period of one (1) year for every year of study, and in the event of my services with the Council being terminated for any reason prior to the completion of the above-mentioned course or prior to fulfilling the obligations set out in this agreement, to refund to Council an amount equivalent to the bursary amount received and effectively due as a pro-rated amount. In these circumstances the amount payable by me shall be paid by deduction from any monies which may become due to me on termination of my services.
6. To authorize the Chief Financial Officer in the event of my services with the Council being terminated for any reason, to deduct from any monies which may become due by me on termination of services. and furthermore understand and agree :
  - that if my conduct, diligence or progress at any time during the period of study is unsatisfactory, the Council shall have the right to cancel this agreement and in such event I shall be required to refund the full amount expended on my

account as at the date of such cancellation in terms of section 34 of the Basic Conditions of Employment Act.

- that the cost of repeating any course, year, subject, etc, shall be at my own expense, where after the Council shall be prepared to review the continuation or otherwise of this agreement.

**DATED at .....on this .....day of.....20.....**

.....  
**SIGNATURE OF EMPLOYEE**

.....  
**WITNESS**

.....  
**SENIOR MANAGER CORPORATE SUPPORT SERVICES**

.....  
**WITNESS**