



## higher education & training

Department:  
Higher Education and Training  
REPUBLIC OF SOUTH AFRICA

# BURSARY POLICY

<b>POLICY CUSTODIAN</b>	Directorate: Human Resource Management and Development
<b>POLICY VERSION</b>	2 <sup>nd</sup> Version
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## A. Acronyms

ACRONYM	DEFINITION
DG	Director-General
DHET	Department of Higher Education and Training
HRD	Human Resource Development
PDP	Personal Development Plan
PSETA	Public Service SETA
TC	Training Committee
TVET	Technical Vocational Education and Training

## B. Glossary of Terms

TERM	DEFINITION
ACCOUNTING OFFICER	Refers to the Director-General of the Department of Higher Education and Training.
BURSARY	Financial assistance offered by the Department to its permanent employees to further their formal studies with a recognised educational institution for a period of 12 months or more.
CRITICAL SKILL	Refer to a specific key or generic and "top-up" skill within an occupation.
DEPARTMENT	The Department of Higher Education and Training including Regional offices, TVET and CET colleges.
DEVELOPMENT	Refers to the holistic and continuous professional learning of employees to ensure that they are always up-to-date with latest developments in their areas of work and responsibilities. It also refers to the grooming of employees to enable them to occupy more senior positions in future.
EDUCATION	Refers to formal type of instruction whose aim is to lead to a qualification or certificate with an accredited institution.

<b>EXECUTING AUTHORITY</b>	Refers to the Minister responsible for the Department of Higher Education and Training.
<b>FORMAL STUDIES</b>	Are defined as part-time and full-time studies at a recognised educational or research institution.
<b>GOVERNMENT DEPARTMENT</b>	Refers to any department or organisational component referred to in Schedule 1 or 2 of the Public Service Act, 1994 (Proclamation No. 103 of 1994).
<b>NATIONAL QUALIFICATIONS FRAMEWORK</b>	Refers to the National Qualifications Framework as contained in the South African Qualifications Authority, Act No. 58 of 1995.
<b>OPERATIONAL REQUIREMENTS</b>	Refers to the work performed for the Department by the employee.
<b>PERMANENT EMPLOYEES</b>	Are employees who are appointed in a permanent capacity by the Department in terms of the Public Service Act, 1994, excluding employees on probation.
<b>PRINCIPAL</b>	Refers to the Accounting Officer at college level.
<b>SCARCE SKILL</b>	Refers to an occupation in which there is scarcity of qualified and experienced people, currently or anticipated in the future, either (a) because such skilled people are not available or (b) they are available but do not meet employment criteria. The scarce skills list is published by the Department of Home Affairs.
<b>STUDY/EXAMINATION LEAVE</b>	Means a period afforded by the Department to an employee who is required to sit through examinations conducted by a recognised educational and research institution.
<b>TRAINING</b>	Represents an organised, disciplined way to transfer the knowledge and know-how that is required for successful performance in a job, occupation or profession. It is ongoing, adaptive learning, and not an isolated exercise.

## **1. BACKGROUND AND INTRODUCTION**

### **1.1 Policy Statement**

The Department recognises the need for highly skilled and knowledgeable personnel to meet the challenges of a democratic South Africa in striving for effective and efficient service delivery to all its citizens. The Department also acknowledges the right of each employee to have access to education, training and development irrespective of race, gender, age, and class as enshrined in Section 29 of the Constitution.

The Department further recognises the need to administer and manage the bursary fund in an equitable, fair and transparent manner to fulfill the needs of the Department and also address the professional growth of its employees. The intention is to balance the individual applicant's career aspirations with the service delivery imperatives of the Department.

### **1.2 Legislative Framework**

- 1.2.1 Constitution of the Republic of South Africa, Act 108 of 1996;
- 1.2.2 Public Service Regulations, 2001, as amended;
- 1.2.3 Public Finance Management Act, 1999 (Act 1 of 1999);
- 1.2.4 Public Service Act, 1994 (Act 105 of 1994);
- 1.2.5 Skills Development Act, 1998 (Act 97 of 1998);
- 1.2.6 Skills Development Levies Act, 1999 (Act 9 of 1999);
- 1.2.7 Employment Equity Act, 1998 (Act 55 of 1998);
- 1.2.8 National Skills Development Strategy (NSDS), 2010;
- 1.2.9 Labour Relations Act, Act 66 of 1995, and as amended 26 April 2011;
- 1.2.10 National Qualifications Framework Act, Act 67 of 2008;
- 1.2.11 Human Resources Development Strategic Framework for the Public Service: Vision 2015;
- 1.2.12 South African Qualifications Authority Act, 1995 (Act 58 of 1995); and
- 1.2.13 White Paper on Public Service Training and Education, 1997 (WPPSTE).

## **2. POLICY PURPOSE, OBJECTIVES AND PRINCIPLES**

### **2.1 Purpose**

2.1.1. The purpose of this bursary policy is to help guide the implementation and management of the bursary scheme for the Department.

### **2.2 Objectives**

2.2.1. The objectives of this bursary policy is to administer and manage the bursary fund in an equitable, fair and transparent manner to fulfill the needs of the Department and also address the professional growth of its employees.

### **2.3 Principles**

2.3.1. The implementation of this policy prescribes to the following principles

- a. Accountability;
- b. Responsibility;
- c. Fairness;
- d. Transparency;
- e. Equity;
- f. Professionalism;
- g. Service excellence; and
- h. Value for money.

## **3. SCOPE AND APPLICATION**

This policy is applicable to all permanent employees who wish to obtain senior certificate, undergraduate and postgraduate qualifications.

## **4. POLICY PROVISIONS**

### **4.1 Invitations for Application of Bursaries**

- 4.1.1 The annual bursary allocation cycle shall commence mid-September of every year, and on commencement of each cycle, the Training and Development Unit shall do the following:
- a. Announce the commencement of the cycle by either a circular or News Flash;
  - b. Indicate on such invitations the processes to be followed as well as closing date for the submission of bursary applications (**Annexure A**); and
  - c. Communicate the outcome of applications to all applicants and managers/supervisors.

### **4.2 Criteria for Awarding of Bursaries**

- 4.2.1 The field of study must be relevant or supportive to the core functions and strategic priorities of the Department.
- 4.2.2 Subject to the recommendation of the Bursary sub-Committee and approval by the DDG: Corporate Services /Principal, and the availability of funds, a bursary will be awarded on condition that the employee has no debt or incomplete qualification in respect of prior study obligations.
- 4.2.3 A fully completed and signed bursary application form is submitted to the Training and Development Unit on or before the annual closing date.
- 4.2.4 The applicant had submitted a motivation from his/her line manager/supervisor confirming the relevance of the intended field of study to the Department and the extent to which such studies will add value to the Department and the employee`s career development. Where there is a complaint regarding the motivation, the matter must be referred to the Bursary sub-Committee.
- 4.2.5 The grade 12s shall be given first priority then followed by undergraduate Degrees/National Diplomas, followed by Honours then Masters and



Doctoral degrees, in that order depending on the availability of sufficient funds.

4.2.6 Priority shall be given to employees below salary level 13, however, SMS members would be considered depending on the relevance of their studies to their functions and priorities of the Department.

4.2.6 The following must be attached to the application form:

- a. Certified copies of all qualifications obtained;
- b. Certified copy of ID; and
- c. Written confirmation from the Educational Institution through which the applicant wishes to enroll the field of study, latest date for registration, minimum duration period for such study, and the total estimated costs of the (including envisaged annual cost increases) course projected over the recommended minimum duration period.

### **4.3 Awarding of Bursary to Serving Employees**

4.3.1 Where the Deputy-Director-General/Principal provides a bursary to an employee the following shall apply:

- a) The signing of the bursary contract by the employee, agreeing to the terms and conditions of the said contract.
- b) Provide the institutional bank account details and a proof of registration with a recognised institution.
- c) Provide an original specified quotation from a recognised bookshop with regard to prescribed study material (online or manual).
- d) Proof of the prescribed books issued by the institution must be made available before payments are made.
- e) No further payments for the following years of study will be made without the submission of final examination results for the previous year of study.
- f) Failed subjects will have to be repeated at the expense of the bursary holder.

- g) The Department shall reimburse an employee for payments made at own expense on receipt of the original proof of payment if he/she is entitled to such payment in terms of the bursary scheme.
- h) The Department reserves the right to withdraw any approved bursary upon the candidate's submission of unsatisfactory results.
- i) Preference shall be given to candidates whose field of study is scarce/critical in the Department as well as in the South African labour market.

4.3.2 A bursary for an employee shall include the following:

- a) Realistic actual study fees namely tuition, examination, registration as well as necessary prescribed study material expenses. Inflationary adjustments for study material will be made on an annual basis.
- b) The amounts determined by the Departmental Bursary sub-Committee may not necessarily cover full study expenses but must be in accordance with the contract cover at least the registration, tuition fees and prescribed books.
- c) The Department to pay a minimum amount of R3 000 for prescribed books (online or manual) which is to increase in accordance with inflation rate per academic year.
- d) The Department shall pay a total amount of R2 500 for prescribed books per semester for the bursary holders registering for semester courses (see above).

#### **4.4 Taking Over of Bursary Obligations**

4.4.1 The Department may approve the taking over of a bursary and/or study debt from other government Departments/public entity under the following conditions:

- a) The employee is transferred with a bursary from another Department provided written confirmation from the former Department is received by DHET on transfer.

- b) In an event where there is no sufficient budget to take over bursary obligations, the bursary holder from other Department would be considered during the next intake.
- c) The employee has submitted his/her academic results and has made satisfactory academic progress, at least pass an average of 75% of the modules registered during the previous academic record.
- d) The Department would be under no obligation to take over full study aid fees of an employee recruited from outside the Public Service.
- e) The Departmental Bursary sub-Committee may consider taking over the bursary obligation on condition that the study course is relevant to the post and in line with the core responsibilities of an employee.

#### **4.5 Change in Study Direction**

- 4.5.1 The Deputy Director-General: Corporate Services or his/her delegate may grant approval to employees who apply to change their direction of study in the event that the new field is in line with the Departmental strategic priorities and career development in the Public Service.
- 4.5.2 The Department shall cancel the bursary contract in cases where the bursary holder changes the study field of study without prior approval and the bursary holder shall be obliged to repay with interest the money owed to the Department from the date which the change occurred.

#### **4.6 Suspension Of Contract**

- 4.6.1 An employee may apply to have his/her bursary contract suspended for a minimum period of one (1) year based on valid reasons (e.g. continuous ill health, personal trauma, and exceptional work pressure).
- 4.6.2 In the event that a bursary holder fails to continue immediately with his/her studies the year following the suspension, the bursary holder will be deemed to have

abandoned the course, and the bursary will be cancelled. The bursary holder shall then be obliged to repay the bursary amount already paid to him/her.

#### **4.7 Extension of Contract**

4.7.1 The bursary holder may at any time during his/her studies apply in writing for an extension of study period and the extension would be granted under the following conditions:

- a. The bursary holder fails to complete his/her studies in the prescribed period, but has however made satisfactory progress.
- b. The Department shall offer a bursary in accordance with the duration prescribed by the academic institution, however, should an employee fail to complete his/her studies within the prescribed period, the employee is liable to apply for an extension of the study duration for a maximum of two years.

#### **4.8 Withdrawal of Contract**

4.8.1 The Department may at any time withdraw the contract if:

- a. The bursary holder fails to register in the first year for which the bursary was awarded.
- b. It is proven that the bursary holder is not making satisfactory progress with the course.
- c. The bursary holder changes his/her study field without prior approval by the Deputy-Director-General: Corporate Services.
- d. In the event that the bursary granted to an employee is withdrawn, the bursary holder shall be liable for repaying the Department all costs incurred for the modules already paid for by the Department.

#### **4.9 Contractual Binding for Serving Employees**

4.9.1 Employees shall be contractually bound to serve the State on the basis of one full year of service for every year for which a bursary was approved,

with due regard to the limits of the amount for which the bursary was granted.

- 4.9.2 The rate for repayment of interest in cases of breach of contract is determined in terms of the provisions of section 80 (1) (b) and 80 (2) of the Public Finance Management Act, Act No. 1 of 1991 (as amended).

#### **4.10 Breach of Contract by Serving Employees**

- 4.10.1 An employee shall be deemed to have breached the contract if he/she fails to comply with the conditions of the contract and under the following circumstances:

- a. In case of a voluntary resignation, the Department shall request the Finance Section (Pension Administration) to recover from the pension benefits of the bursary holder to the Department as payment/partial payment of the bursar's debt, unless if such pension funds are transferred to another pension fund immediately after termination of service in that case the employee must repay:
- i. Cessation of studies;
  - ii. Cancellation of the bursary; and
  - iii. Change of institution or study course without prior approval by the Bursary sub-Committee.

- 4.10.2 In the case of the above, the bursary holder will have to repay the Department the money that was paid for his/her studies including interest.

#### **4.11 Special Leave for Study Purposes**

- 4.11.1 In all cases, leave granted will be strictly in accordance with the prevailing Departmental Leave Policy.

#### **4.12 Management of Bursaries / Financial Assistance**

- 4.12.1 The bursary holder shall be responsible for own registration and submitting proof of registration a month before the closing date of registration.

- 4.12.2 Failure to submit proof of registration a month before the tertiary institution's closing date, will result in the student being liable for the cost of late registration and interest. The Department shall not be liable to pay the late registration fees under any circumstances.
- 4.12.3 Bursary holders must submit their results to the Training and Development Unit within a month after the results are released by the higher education institution.
- 4.12.4 Year-end results with a successful completion of at least an average of 75% of the number of modules/subjects registered for a specific year must be submitted before payment for the next academic year can be made.
- 4.12.5 The Bursary sub-Committee shall ensure that an amount to be allocated for each academic year should not be exceeded.
- 4.12.6 The bursary holder must have completed and signed the contract before registration at the tertiary institution.
- 4.12.7 In the event a bursary has been granted and the employee does not make use of the privilege, the Bursary sub-Committee must be informed in writing with motivation. The bursary holder shall then have to re-apply for a new bursary for the next academic year should he/she wish to do so.
- 4.12.8 In the event the obligation cannot be fulfilled due to unavoidable circumstances for example death of the bursary holder, any liability resulting from such a bursary shall lapse.
- 4.12.9 In the event the employee leaves the Public Service before fulfilling the bursary obligation, the employee shall be liable for paying back all expenses incurred plus interest as determined by Minister of Finance through National Treasury. Such money shall be recovered as a debt from the employee's pension fund.
- 4.12.10 Under no circumstances shall the Department be liable for payment of travelling and subsistence, accommodation and transport allowances for serving employees who are studying on part-time basis. Bursary holders shall be responsible for the cost of travelling to and from their higher education institutions.

## 5 BURSARY SUB-COMMITTEE

5.1 The Bursary sub-Committee shall be established in the department, regional offices and colleges.

5.2 The sub-committee shall be composited as follows across the department:

- a) Chairperson – HR Manager at college level, Deputy Director: Corporate Service at regional level and Director: HRD at head office.
- b) Secretariat – Training and Development Units.
- c) One representative per division or branch who is within the Skills Development Committee.
- d) One union representative who is within the Skills Development Committee.

5.3 The sub-committee shall perform the following functions:

- a) Adjudicate the awarding of bursaries and ensure that the process followed is fair and equitable.
- b) Ensure that the intended field of study is appropriate to meet the skills needed for the Department.
- c) Ensure that the approved budget is not exceeded.
- d) Review the awarding of bursaries to annually and recommend renewal based on previous year's academic performance.
- e) Report activities of the sub-committee to skills development committees.
- f) Advise delegated authorities on all matters pertaining to bursary assistance.
- g) Recommend the awarding of bursaries to delegated authorities for approval.

## **6. ROLES AND RESPONSIBILITIES**

### **6.1 Training and Development Units**

- 6.1.1 Manage, facilitate and co-ordinate Bursary Scheme of the Department.
- 6.1.2 Advise line managers and staff members in the Department regarding bursary opportunities.
- 6.1.3 Co-ordinate and provide secretariat support to the Departmental Bursary sub-Committee.
- 6.1.4 Invite applications for bursaries through a circular or News Flash or Bulletin.
- 6.1.5 Respond to queries and compile reports for internal and external auditing.
- 6.1.6 Communicate the outcome of applications to all applicants and line managers/supervisors.
- 6.1.7 Arrange for contracts to be signed with successful applicants.
- 6.1.8 Oversee the implementation of the Bursary Policy within the Department.
- 6.1.9 Monitor the Bursary Scheme on an on-going basis and formally evaluate it at least on a quarterly basis,
- 6.1.10 Report to the Training Committee which is a consultative forum and a key structure for staff development in the Department, which is there to play an oversight role in the management of the bursary scheme.

### **6.2 Line Manager/Supervisor**

- 6.2.1 Motivate and encourage an employee to participate in the Bursary Scheme taking into account the competencies required in his/her functions as well as career development of an employee when applying for a bursary.



- 6.2.2 Advise and discuss the bursary application with the employee.
- 6.2.3 Support the employee through out his/her learning process by creating a conducive environment to acquire and implement knowledge and skills.
- 6.2.4 Recommend the bursary application to the Bursary Committee in such a manner that is beneficial to both employer and employee.
- 6.2.5 Ensure that employees do not register for more than three (3) courses per calendar year.

### **6.3 Employee**

- 6.3.1 Take the initiative of applying for financial assistance in consultation with line managers/supervisors (**Annexure A**: application form).
- 6.3.2 Complete bursary contract as in the prescribed format in cases where a bursary has been approved.
- 6.3.3 Submit all relevant documentation, including statements, receipts or proofs of payment as per stipulated time frames.
- 6.3.4 Co-operate at all times with the Training and Development Unit on administrative processes.
- 6.3.5 Take full responsibility for own studies by writing and submitting assignments within specified time frames, and ensuring the achievement of learning outcomes.
- 6.3.6 Register less than three (3) subjects or courses per qualification in a single academic year.

### **6.4 Principal**

- 6.4.1 Overall responsibility for decision making, planning and implementation at college level.
- 6.4.2 Ensure that there is a dedicated and adequate budget for the Bursary Scheme, within reasonable means.
- 6.4.3 Ensure that the Bursary Scheme is linked to college strategic priorities or scarce and critical skills.

- 6.4.4 Ensure that the Bursary sub-Committee is established and fully functional.
- 6.4.5 Ensure that all employees have equal access to bursary opportunities within the college.
- 6.4.6 Approve the bursary award as recommended by the Bursary Committee.

#### **6.5 Deputy Director-General: Corporate Services**

- 6.5.1 Overall responsibility for decision making, planning and implementation.
- 6.5.2 Ensure that there is a dedicated and adequate budget for the Bursary Scheme
- 6.5.3 Ensure that the Bursary Scheme is linked to Departmental Strategic priorities or scarce and critical skills.
- 6.5.4 Ensure that the Departmental Bursary Policy is aligned to the relevant legislation and government priorities.
- 6.5.5 Ensure that all employees have access to bursary opportunities within the Department.
- 6.5.6 Approve the bursary award as recommended by the Bursary Committee.

### **7. MONITORING AND EVALUATION**

- 7.1 The Departmental Skills Development Committee and the Bursary Sub-Committees shall monitor the implementation of the bursary scheme in the Department.

### **8. REVIEW OF THE POLICY**

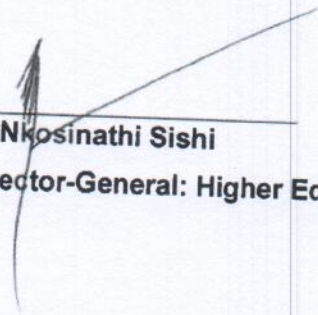
- 8.1 In line with the amendments to the existing legislation, this policy will be reviewed after every three years or as and when the need arises.

**9. DISPUTE RESOLUTION**

9.1 Any dispute arising out of the interpretation and / or application of this policy shall be dealt with following applicable legislation and policies. Training and Development unit shall be the first point of call in case a dispute arise pertaining to the implementation of this policy.

**10. POLICY APPROVAL**

Signed at Pretoria on this 30<sup>th</sup> day of March 2022

  
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**Dr Nkosinathi Sishi**  
**Director-General: Higher Education and Training**