

UNIVERSITY OF THE
FREE STATE
UNIVERSITEIT VAN DIE
VRYSTAAT
YUNIVESITHI YA
FREISTATA



UFS STUDY BENEFIT SCHEME

Approved at Council, 21 November 2025

POLICY STATEMENT	
1. Preamble/ background	<p>1.1 It is the policy of the University of the Free State (UFS) to grant study benefits to certain staff members (hereafter defined and specified) to assist them regarding the tuition fees for study and the study of their spouses and/or children at the UFS. The categories of persons that qualify for study benefits and the applicable tariffs were approved by Council and are set out below.</p> <p>1.2 The granting of a study benefit is wholly at the discretion of the UFS, whether at a general level or in any individual case, and the benefit usage is subject the rules of the UFS.</p>
2. Purpose	<p>2.1 The purpose of the policy is to give information to staff members regarding the study benefit and the application thereof.</p>
3. Scope	<p>The policy applies to:</p> <ul style="list-style-type: none"> 3.1 Permanent staff members. 3.2 Contract staff members. 3.3 Staff on Joint Establishment. 3.4 Staff members of the UFS Service Providers/Contractors.
4. Definitions and abbreviations	<p>Study benefit refers to the study benefit that can be granted to a member of the staff, or to his/her spouse or child, by way of exemption from tuition fees for study at the UFS, a university of technology excluded, but the Central University of Technology, Free State included (<i>as stipulated in the agreement between the UFS and the Central University of Technology, Free State regarding the study of staff members and their dependants</i>), or by way of partial aid regarding the tuition fees of another South African university.</p> <p>Child refers to a biological, legally adopted child or stepchild who is not older than 25 years of age. A study benefit can therefore be granted for the year in which the child turns 25 years of age.</p> <p>Spouse means the legally married or life partner of the staff member.</p> <p>Staff member in the context of this document, it means full-time and part-time staff member of the UFS as defined in the Conditions of Service of the UFS, honorary academic staff members or members of specified associated institutions as indicated in Appendix A.</p> <p>Tuition fees means the tuition fees (class fees) payable to a university by a registered student and excludes additional costs such as that of accommodation, registration, cancellations, exemptions, re-examination or special and additional examinations, admission to status and the issuing of certificates, costs for the use of equipment and materials, money for the purchase of materials and deposits for</p>

	<p>breakages. However, the study benefit will include registration fees for staff members, but not for their spouses or children.</p> <p>Student means staff member, spouse and children who have registered to study at the UFS, CUT, Free State or another South African public university.</p> <p>MBA means Master of Business Administration.</p> <p>BML means Bachelor of Management Leadership.</p> <p>UFS means University of the Free State.</p>
5. Guiding Principles	<p>5.1 The study benefit is a way to assist staff members, their children and spouses with the payment of tuition fees subject to the provisions of this policy.</p> <p>5.2 The UFS recognises the need to standardise benefit structures across campuses to ensure consistency, fairness, and responsible financial management.</p>
6. Policy	<p>6.1 Staff members, spouses and children of staff members</p> <p>6.1.1 The starting point is that the study benefit is for study at the UFS. A study benefit for children of staff members for programmes at other universities, universities of technology excluded, will only be considered in exceptional circumstances as described in paragraph 6.3.3.1.</p> <p>6.1.2 The study benefit is applicable to staff members of the UFS, as well as to those on the Joint Staff Establishment in the Faculty of Health Sciences and their spouses and/or children, as well as to those temporary staff members that meet certain requirements. There are also certain groups with close ties to the UFS that qualify for study benefits, subject to certain conditions. See Appendix A for members who qualify for study benefit.</p> <p>6.1.2.1 Part-time staff members (e.g. 30 hours per week, 25 hours per week, etc.) qualify for a pro-rata study benefit for the first three (3) years of service, e.g. 30 hours per week/40 hours per week qualifies for 75%. After three years, the staff member qualifies for 100% study benefits.</p> <p>6.1.2.2 In addition, only staff members appointed for a semester (six months) or longer qualify for a study benefit. If a staff member is appointed for less than one year, they will qualify for a pro-rata study benefit.</p> <p>6.1.3 If a staff member retires, dies, receives a separation package or retires due to medical disability (and subject to this policy), study benefits can be granted/continued for the staff member, spouse or child.</p>

	<p>6.1.4 The duration of a study benefit granted to a staff member, child or spouse is linked to the staff member's service at the UFS and should the staff member resign during the year programme, the study benefit is forfeited. The staff member will then be liable for the tuition fees from the date of resignation and, should the benefit have been paid out to him/her already or credited against an account, the proportional amount for which he/she has now become liable will be recovered from him/her.</p> <p>6.1.5 Study benefits will only be granted in respect of students who follow prescribed curricula and programmes, which are recognised by the Government for the purpose of university subsidy. This includes MBA and BML degrees and the Postgraduate Diploma in Financial Planning (also see par. 6.2.6). Certificates and short learning programmes as well as other courses/programmes/qualifications offered at the UFS Business School, are not funded in terms of this policy.</p> <p>6.1.6 Study benefits are granted for one academic year only and applications for study benefits for the following year must be submitted annually, as soon as the final marks are available.</p> <p>6.1.6.1 The study benefit will only be granted twice for a specific subject/module for studies at the UFS. Should the receiver therefore fail a subject/module for a second time, the benefit will not be granted again for that subject/module. For studies at another South African university, a benefit will only be granted once for a specific subject/module.</p> <p>6.1.6.2 The maximum period for which a spouse of a staff member qualifies for study benefits (undergraduate and post-graduate study in total) is six (6) years. The maximum study limitation does not apply to staff members. Children of staff members will only qualify for study benefits up to the age of 25 years (see Definitions – child).</p> <p>6.1.6.3 The full academic record or progress report in respect of the previous year's study must accompany the study benefit application for approval of the study benefit for the following academic year.</p> <p>6.1.7 The granting of this study benefit does not affect the qualification for receiving any other study bursaries.</p> <p>6.1.8 The Human Resources Department is responsible for the administration of the study benefits scheme.</p> <p>6.2 Staff members</p> <p>6.2.1 The Income Tax Act, 1962 (Act no. 58 of 1962) indicates that study benefit is taxable if the qualification is not job-related and ultimately for the employee's benefit. Therefore, the staff</p>
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	<p>member will be taxed if the qualification is not related to the job. With the implementation of the Competency Framework, a competency profile was developed for each Support Services position and each individual can thus be assessed in order to establish their developmental areas. The developmental areas must be recorded in the Individual Development Plan in order to ensure that the training that the individual needs is job related and ultimately for the employer's benefit and thus exempted from being taxed as a benefit.</p> <p>6.2.2 Staff members who receive study benefits for their own study at the UFS or at the Central University of Technology, Free State will be required to sign a workback agreement as from January 2004. For each year for which the study benefit is granted, the staff member will have to render one year's service. The service will start in the year that follows the granting of the study benefit. Should staff members leave the UFS during their study, or after completing their degree, but before having rendered one year of service to the UFS, they will be expected to repay the cost of the benefit pro rata. However, staff members on fixed-term contracts are not required to repay the study benefit if the contract expires. In the event of a resignation on a fixed-term contract, the staff member will be required to repay the study benefit received for the period until resignation.</p> <p>6.2.3 If a staff member is dismissed, the study benefit is payable until the last day of service. The staff member will be responsible for the remainder of the academic year.</p> <p>6.2.4 In terms of this policy, the study benefits will not be granted to staff members for study at other universities.</p> <p>6.2.5 However, each department may pay for tuition fees of a staff member to study at other universities provided that:</p> <ul style="list-style-type: none"> a) The degree is job related. b) The department has budgeted for the benefit. c) Staff member signs a work-back agreement to render one year's service after the year that the department paid for the tuition fees. <p>6.2.6 Staff members may qualify for a study benefit for part-time MBA and BML degrees and the Postgraduate Diploma in Financial Planning, subject to its relevance to the post occupied by the staff member (see Appendix A) and approval by the Head of Department. Only one UFS staff member qualifies per intake for the payment of class fees for MBA studies. BML study benefit approval is subject to the availability of additional funds that are managed by HR Department.</p>
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	<p>6.2.7 In the case of late registrations, staff members will be personally responsible for the registration fee.</p> <p>6.2.8 Staff members must apply for vacation leave when attending classes during office hours.</p> <p>6.3 Spouses and children of staff members</p> <p>6.3.1 Study benefits will only be granted to spouses of staff members for study at the UFS.</p> <p>6.3.2 The granting of benefits to children of staff members for study at the Central University of Technology, Free State will only be considered in terms of the existing agreement with the Central University of Technology, Free State.</p> <p>6.3.3 The granting of study benefits to children of staff members for study at another South African university (universities of technology excluded) will only be considered by the HR Department for the following courses and under the following circumstances:</p> <p>6.3.3.1 Engineering, veterinary science, dentistry, speech therapy, pharmacy, library studies, marine biology, as well as postgraduate university theological study and church-specific theological training for which no provision is made at the UFS. <i>This provision for Engineering applies only to engineering fields that are not offered at the UFS. Furthermore, as soon as a programme in Veterinary Science is implemented at the UFS, staff members will no longer qualify for the study benefit for this field at another institution.</i></p> <p>6.3.3.2 Should the child of a staff member not be admitted to a specific programme at the UFS or Central University of Technology, Free State but is admitted for this programme at another university, he/she will not qualify for study benefits.</p> <p>6.3.3.3 For the above-mentioned, the study benefits will be equal to the tuition fees for the programme at that university. The maximum study benefit will be the cost of the degree (tuition fees) of an MBChB degree (second year) at the UFS.</p> <p>6.3.3.4 Proof of registration and the accounts of students studying at other universities must be submitted to the HR Business Partner before study benefit can be paid.</p> <p>6.4 Residence/Accommodation costs</p> <p>6.4.1 The University does not cover the residence costs/accommodation costs for children or spouses of staff members who qualify for remission across all UFS campuses. The University only covers the tuition costs.</p>
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7. Responsibility	7.1 Director: Benefits and Administration, Human Resources
8. Accountability and Authority:	
8.1 Implementation:	8.1.1 Director: Benefits and Administration 8.1.2 Tuition Fees Section within Finance Department 8.1.3 Line Managers 8.1.4 HR Business Partners
8.2 Compliance:	8.2.1 Director: Benefits and Administration 8.2.2 Tuition Fees Section within Finance Department 8.2.3 Line Managers 8.2.4 HR Business Partners
8.3 Monitoring and evaluation:	8.3.1 Director: Benefits and Administration 8.3.2 Tuition Fees Section within Finance Department 8.3.3 Line Managers 8.3.4 HR Business Partners
8.4 Development/review:	8.4.1 Director: Benefits and Administration
8.5 Approval authority:	8.5.1 Council
8.6 Interpretation and advice:	8.6.1 Director: Benefits and Administration 8.6.2 HR Business Partners
9. Who should know this policy?	
All staff members, line managers and supervisors.	
10. Policy/procedure implementation plan	10.1 Policy is already in use.
11. Resources required	11.1 The policy is made available to all new staff members and is also made available on the UFS website. Staff members approach their relevant HR Business Partners for enquiries.
12. Answers to FAQs	<p>12.1 I want to study at another university, will my studies be paid through the study benefit? No, only studies at the UFS or CUT, Free State are covered. However, your department may pay for your studies if the degree is job related, and the department has a budget.</p> <p>12.2 Does study benefit cover short learning programmes? No, only formal degrees are covered by the study benefit. Courses at the UFS Business Schools are also not covered except BML and MBA, with certain conditions.</p> <p>12.3 Can my spouse study at another university or CUT FS? No, spouses are covered for studies at the UFS only.</p> <p>12.4 Can I study a degree that is not related to my job? Yes, however, there will be tax implications.</p> <p>12.5 I am in a living-together relationship, will my partner qualify for the study benefit? Staff members who are in a permanent life partnership or living-together relationship may extend the study benefit to their partners, subject to verification of the relationship's nature and</p>

	<p>permanence in accordance with UFS policy and applicable South African legislation.</p> <p>In terms of the <i>Constitution of the Republic of South Africa, 1996</i>, the <i>Civil Union Act, 2006 (Act No. 17 of 2006)</i>, the <i>Basic Conditions of Employment Act, 1997 (as amended)</i>, and the <i>Employment Equity Act, 1998 (as amended)</i>, the UFS upholds the principles of equality and non-discrimination in recognising life partnerships comparable to marriage for the purpose of employment-related benefits.</p> <p>Accordingly, staff members may be required to submit an affidavit or other supporting documentation confirming the existence of a long-term, committed partnership before the study benefit can be approved.</p> <p>12.6 I stay with my niece whose parents passed away; will she qualify for the study benefit? No, only if you have legally adopted your niece or you are a legal guardian and you can provide proof of this adoption or guardianship.</p> <p>12.7 My spouse/dependant wants to enrol for MBA or BML, will the study benefit cover the fees? No, the study benefit covers only staff members for these degrees.</p> <p>12.8 When should I apply for the study benefit for my child? You must apply before the end of November of every year or after you receive academic results because these results will be needed to determine if the study benefit will pay for all the modules which will be registered.</p> <p>12.9 Should my line manager approve the study benefit application for my dependant? No, the line manager approves only if it is for your studies as a staff member.</p> <p>12.10 Who should I contact if I need information on the study benefit policy? Please contact your designated HR Business Partner.</p>
EFFECTIVENESS OF THE POLICY	
Performance Indicator(s):	<ol style="list-style-type: none"> 1. As the policy is already in use, staff members know about this policy and refer their enquiries to their designated HR Business Partners. 2. The policy is provided to all new staff members as part of the appointment documents. 3. The policy is on the UFS website.

STUDY BENEFITS FOR WHICH STAFF MEMBERS QUALIFY

The following benefits are paid in respect of:
 Staff members - Registration fee plus tuition fees
 Spouses - Tuition fees only
 Children - Tuition fees only

Category / Receiver	Requirements / Eligibility	Study benefit
1.0) COUNCIL MEMBERS	Serving members of Council (as from the date of appointment)	a) Council members and their dependants do not qualify for study benefit.
2.0) UFS STAFF MEMBERS AND JOINT STAFF ESTABLISHMENT		
2.1) Permanent – Without end date (Academic Year Included)	2.1.1 40 hours per week 2.1.2 30 hours per week 2.1.3 25 hours per week 2.1.4 20 hours per week	a) 100% exemption from tuition and registration fees as from date of appointment b) 75% exemption from tuition and registration fees as from date of appointment c) 62,5% exemption from tuition and registration fees as from date of appointment d) 50% exemption from tuition and registration fees as from date of appointment NB: 2.1.2, 2.1.3, 2.1.4 after three years' service – 100% benefit.
2.2) Contract – With end date (Academic year included)	2.2.1 40 hours per week 2.2.2 30 hours per week	6 months or longer Pro rata a) 100% exemption from tuition and registration fees as from date of appointment b) 75% exemption from tuition and registration fees as from date of appointment

	2.2.3 25 hours per week 2.2.4 20 hours per week	c) 62,5% exemption from tuition and registration fees as from date of appointment d) 50% exemption from tuition and registration fees as from date of appointment
2.3) Lecturing staff (Units)	2.3.1 6 months or longer	a) Pro rata % exemption from tuition fees (determined by number of classes offered per week) NB: After five years' service – 100% benefit
Category / Receiver	Requirements / Eligibility	Study benefit
2.4) Affiliated Lecturers	2.4.1 Appointment for at least one year	a) 100% exemption from tuition fees – staff member only
2.5) Music lecturers (Units)		a) Pro rata % exemption from tuition fees (discount will be determined in relation to the number of hours lectured per week up to and including 5/8 of 21,5 hours. b) Child/spouse of a lecturer who lectures for 13, 5 hours per week, will receive 100% exemption from tuition fees. NB: After five years' service -100% benefit.
3.1) Staff members who retire due to ill health	3.1.1 Staff members who retire due to ill health	a) 100% exemption from tuition fees for staff member, children and spouse.
3.2) Deceased staff members	3.2.1 Deceased staff members	a) 100% exemption from tuition fees for children and spouse.
3.3) Rationalisation (Staff reduction)	3.3.1 As agreed upon during rationalisation process in 2000/2001	a) 100% exemption from tuition fees for staff member, children and spouse.
4.0) Pensioners	4.1 Staff members who retire and were in the service of the UFS and Joint Staff Establishment.	a) 100% exemption from tuition fees for staff member, children and spouse.
5.0) Qwaqwa Campus	5.1 The same as for UFS -Bloemfontein Campus	a) Payment of accommodation costs is no longer applicable and will be phased out for Qwaqwa Campus staff members who are currently in 2024 enjoying this benefit.
6.0) MBA, BML, Postgraduate Diploma	6.1 The application must include a detailed motivation with a recommendation by	a) 80% exemption from tuition fees. Only one UFS permanent personnel member qualifies per intake for the payment of class fees

in Financial Planning	the Head of the Department to indicate that the qualification is work-related.	for MBA. BML studies depends on the availability of additional study benefits funds. Spouses and children do not qualify for these programmes.
7.0) Students' Representative Council (SRC President and Vice-President)	7.1 Term of office stretches from 1 August to end of July of the next year.	a) Pro rata: 33,0% for the first half of the term of office and 67,0% for the second half. The SRC President and Vice-President only qualify for study benefit if they do not qualify for NSFAS or any other bursary.
8.0) Ad hoc cases		
8.1) Stepchildren	- Senior Director: Human Resources decides, as maintenance from a previous marriage can impose a limitation on the benefit.	
8.2) Guardianship	- The validity of guardianship must be determined.	
8.3) Children in foster care	- Senior Director: Human Resources decides as allocations can impose a limitation on the benefits. The legality of the foster care must be determined.	
8.4) Life Partner	- The Senior Director: Human Resources is responsible for confirming the validity of a life partnership for benefit purposes. Verification may include consideration of: <ul style="list-style-type: none"> • The duration and nature of the relationship; • Whether the partner is registered as a dependent on the employee's medical aid; • Whether the partner is nominated as a beneficiary on the employee's pension fund or group life insurance; and/or • Whether an affidavit or supporting documentation confirming the partnership has been submitted. All personal information collected for verification purposes will be managed confidentially and in compliance with the <i>Protection of Personal Information Act, 2013 (Act No. 4 of 2013)</i> .	

9.1) Extension of Study Benefit Scheme: Employees of contractors that are performing a service which is normally performed by the UFS itself, and the contract must be three years or longer to qualify for the Study Benefit. The Executive Management Committee will identify these contractors from time to time, as required. The benefits will only remain valid for the period during which the employee concerned performs a service at the UFS and his/her employer is a contractor of the University.