



Bursary & Study Scheme Policy



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VERSION:	1
TITLE:	Bursary and Study Scheme Policy
REFERENCE NUMBER:	001/FRD/HC/2021
EFFECTIVE DATE:	1 July 2021
COMPILED BY:	Human Capital
HC REPRESENTATIVE	Miss L. Lebata
SIGNATURE:	
DATE:	29/07/2021
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1. PURPOSE

AMCE is committed to the development of its workforce and the retention of skilled human capital in order to maintain its competitive edge.

The purpose of this policy is to promote the development of employees by providing financial assistance to employees who wish to further their qualifications on a part time basis whilst in the company's employ. This policy further stipulates the conditions under which the 'company' may disburse funds towards its employees' education/studies, application procedure, selection criteria and other conditions relating to the granting of bursaries for educational purpose.

The company wishes to encourage and assist employees at all levels who would like to develop their skills and thus increase their value to the organization. The qualification/s should enable the employee to perform better in his or her current job and should contribute towards the development of that employee's set career path/s within the organization. This will directly benefit the employee in terms of personal development as well as AMCE.

2. PROBLEM STATEMENT

The non-existence of a formally endorsed bursary and study scheme policy within the organization has presented several loopholes as far as the application and bursary allocation principles and standards are concerned. This policy therefore is aimed at creating a standard bursary application and granting policy and procedure, that will bridge the identified loopholes, be precise and in alignment with the company objectives.

3. PRINCIPLES

This policy is applicable to all permanent and fixed term contract employees (as stipulated on the pay-back clause) under the company's employ.

The application and implementation of this policy is underpinned by:

- **Employee development:** As indicated above, the company recognizes the importance of ongoing staff development and the positive impact that this will have on both the individual employee and the organization.
- **Return on investment:** Studies funded must bring a return on the investment made in the individual employee.
- **Strategic requirements of the organization:** Funded studies will be in fields that are imperative to the business and are in alignment with the strategic direction of the company.

4. DEFINITIONS

In this policy, unless the context indicates otherwise the following words mean:

"Bursary"	means financial assistance provided by the Company to a Beneficiary for the payment of formal education expenses.
"Bursary Application Form"	means a form to be completed by Bursary applicant requesting a Bursary from the Company which is materially in the form as contained in Annexure A ;
"Bursary Contract"	means an agreement entered or to be entered into between Beneficiary and the Company for the disbursement of funds by the Company, to fund the Beneficiary's approved Course.
"Beneficiary"	means the Company's employee identified in the Bursary Contract, who receives/received a Bursary from by the Company for the purposes of learning or development intervention and in terms of which such party shall have a work-back obligation towards the Company.
"Company"	means 'A-M Consulting Engineers (Pty) Ltd', shortened 'AMCE'.
"Conditions of Service"	means the Company's conditions of service at the applicable time. Such Conditions of Service shall, where the Beneficiary is an employee of the Company, form an integral part of this Policy.
"Course"	means, in relation to the Beneficiary, the training programme, academic qualification, educational development or learning programme or any other structured learning, tuition and examination for which the Company funds shall be expended and which forms the subject of work-back obligations in terms of this Policy and the Bursary contract/form;
"Institution"	means a recognized, accredited, and/or registered South African institution of higher learning.
"Work-back Obligation"	means the obligation(s) of the Beneficiary to work back for a specific period in recognition of the investment made by the Company in granting the Beneficiary a Bursary; and
"Work-back Period"	Commences from the official date of results and accrues to the duration of the funded course of study.

- “Results”** means the official course results received from the institution. A result is either a pass or a fail. In the event of a supplementary examination being offered, a result will mean the outcome thereof.
- “Satisfactory Progress”** means a minimum of 50% ‘pass’ result on the registered subjects/modules of the course financed by AMCE.
- “NQF Levels”** means National Qualification Framework Levels
- “National Qualifications Framework (NQF)”** means a system that formally records the credits assigned to each level of learning achievement to ensure that the skills and knowledge that have been learnt are recognized nationally.
- “South African Qualifications Authority (SAQA)”** means the oversight body of the NQF and the custodian of its values and quality character. SAQA advances the objectives of the NQF, oversees the further development and implementation of the NQF, and co- ordinate the Sub-Frameworks.

5. ELIGIBILITY FOR FINANCIAL ASSISTANCE

To be eligible for a bursary, the following criteria will apply: -

- 5.1 All employees of the Company in permanent employment. Fixed term contract employees may be considered subject to the conditions laid in 7.5 having been met.
- 5.2 New employees who have successfully completed their probation.
- 5.3 Employees who do not have an existing bursary awarded by the company (only one bursary will be awarded to an employee at a time).
- 5.4 If an employee is a previous bursary holder, complete academic results from previous study course must be submitted to Human Capital department (prior to the submission of the next bursary application).
- 5.5 The proposed field of study must:
 - 5.5.1 be related to the company's business activities or aligned to its line of business.
 - 5.5.2 be followed at a recognized, registered, and reputable university, university of Technology, or an accredited college of education; and must result in a recognized degree/diploma/certificate qualification in alignment with the NQF Levels of the Higher Education Qualifications Framework as stipulated by the South African Qualifications Authority.

5.6 In addition to the proposed field of study, the following considerations will be considered in evaluating the application:

5.6.1 Feasibility of proposed educational institutions in terms of cost and location, and

5.6.2 Number of days required for study schools versus work demands.

The application for bursary and study scheme studies must be read in conjunction with the Leave Policy. The onus is on the line manager to approve the number of leave days requested

5.7 The travel and subsistence allowances/claims are not applicable to an employee who travels for academic purposes.

5.8 South African institutions will take first preference.

6. SELECTION CRITERIA

The selection of Beneficiaries will be based on the following criteria: -

6.1 Preference for the awarding of Bursaries shall be based on the relevance of the qualification to the Company's line of business, and more especially where: -

6.1.1 The Course will provide the applicant with critical skills required in his / her current position.

6.1.2 The Course is in line with the applicant's anticipated career path within the Company.

6.2 Applications will be considered based on the availability of funds.

6.3 Where a high number of qualifying applicants is received, management of AMCE may in its own discretion decide to sponsor only some applicants and/or a certain percentage of courses.

7. APPLICATION PROCESS:

7.1 An applicant interested in applying for a Bursary must submit the following documentation to the Human Capital Department: -

7.1.1 The completed, signed, and dated Bursary Application Form (duly signed by the applicant's line manager).

7.1.2 Certificate of highest academic qualification obtained.

7.1.3 A quotation reflecting full tuition from the academic institution.

- 7.1.4 A printout of the Course the applicant wishes to study towards, indicating the entry requirements, course content such as; course description, number of modules/subject/units and all other information relevant to the Course.
- 7.2 Applications must be submitted to the Human Capital Department by the date communicated by the department at the beginning of every academic year.
- 7.3 Applicants shall be notified of the outcome of their application as soon as the assessment of the application is concluded.
- 7.4 The company may at its discretion open-up a mid-year window for submission of applications for courses that commence in June/July of each year.
- 7.5 The following shall apply in respect of employees employed on fixed-term contracts: -
- 7.5.1 A Bursary may be granted to an employee on a fixed term contract. However, the academic period for which a Bursary may be advanced should not exceed the duration of the current employment term or the remainder thereof.
- 7.5.2 The remaining term of the fixed contract, as calculated from the date of Course enrolment, must at least be half the duration of the Course for which a Bursary is to be advanced.
- 7.5.3 In the event of the (remaining) employment term not being long enough for the applicant to complete the Work Back Period, the Company may grant the Bursary on the condition that at the end of the fixed term contract, the Beneficiary repays a pro rata amount for of the Bursary spent not worked back.
- 7.5.4 The above will be calculated by dividing the amount of the total Bursary by the Work Back Period (in months). The monetary equivalent of the number of months not worked would be what is payable by the Beneficiary.
- 7.6 Consideration will be given to bursary applications of courses which were initially self-funded (for 1st or 2nd year). In this case, the applicant must have passed all the modules registered in previous academic year/s. The results of the previous academic years will form part of the mandatory supporting documents to the bursary application. The bursary will not be awarded for previously failed modules.

8. VALUE OF THE BURSARY

- 8.1 Company shall strive to pay the full tuition fees of the Beneficiaries.
- 8.2 Depending on the number of applications received, partial Bursaries may be granted to ensure that a wider number of Beneficiaries are afforded funding.
- 8.3 Fees will be paid on a year-by-year basis and on reapplication.
- 8.4 The continuation of a Bursary in subsequent years of study will be subject to the satisfactory academic progress of the Beneficiary and the availability of funds.
- 8.5 There is no guarantee that the Company will fund an employee on an ongoing basis to completion of his/her qualification.

9. CONTRACTUAL OBLIGATIONS:

- 9.1 Upon completion of each funded course of study, the Beneficiary shall be obligated to serve with the Company, a similar period that the Company has paid for the studies.
- 9.2 The Bursary will be treated as a loan until the Work Back Period is complete.
- 9.3 The Work Back Period shall be calculated from the date that the Beneficiary completed the funded course of study and shall run concurrently from date of results.
- 9.4 Should the Beneficiary, for whatever reason, fail to continue or complete the studies, the total amount paid towards the studies by the Company will become immediately due and payable to the Company, which may at its discretion deduct the amounts owed from any funds due to the Beneficiary.
- 9.5 Should the Beneficiary leave the Company prior to successful completion of the Course, the full monetary value of the Bursary will immediately become due for repayment to the Company.
- 9.6 Should the Beneficiary leave the Company after having completed his or her studies, but before the end of the Work Back Period, the monetary value to be recovered from the Beneficiary will be calculated on a pro rata basis by dividing the Bursary amount by the number of months that the Company has funded the Beneficiary (which makes up the Work Back Period).
- 9.7 The Company reserves the right not to approve further bursary applications from the beneficiary after a successful completion of previous bursary. Furthermore, the company reserves a right not to approve further bursary applications if it is of the opinion that the beneficiary is not making satisfactory progress (on existing awarded bursaries) or did not make satisfactory progress on previously awarded bursaries.
- 9.8 A Bursary applicant may withdraw his/her application at any stage prior to the Company effecting payment to the relevant Institution, by giving the Company 30 days' notice in writing and stating the reason for the withdrawal. Any amounts paid already towards the Course will be recovered from the employee or worked through as per this policy or bursary agreement.
- 9.9 The Beneficiary shall repeat failed courses or subjects at own cost.
- 9.10 In the event that an employee fails outright or did not write examinations (except in the event of illness), no further bursary shall be granted (in relation to the failed subject) to an employee. The employee will be required to rewrite the examination at his or her own cost.
- 9.11 In the event that an employee fails particular subject(s) and does not re-register at his or her own cost in the following semester or year (in a case of year courses/subjects), or fails to write examinations in respect of particular course (s) or electively withdraws from the course, the sum of money which had been paid out by the Company in respect of the unsuccessful subjects (including prescribed books, study material, study leave) will be converted to a loan and recovered from the employee's salary on a monthly basis over a period not exceeding 12 months.

- 9.12 In a case where an employee must write a supplementary exam, the employee will apply for annual leave.
- 9.13 Should an employee deregister after any amount has been paid to either the employee (in terms of re-imbursements) or academic institution, the employee will repay such amounts to the Company.
- 9.14 In the instance of a bursary being converted to a loan, the employee will sign an "Acknowledgement of Debt" form. The loan will not bear interest but fringe benefit tax will be applied.

10. ADMINISTRATION PROCESS

- 10.1 The bursary application and administration process will be applied in line with the company's Training & Formal-education Bursary Process and Procedure.
- 10.2 The awarding of Bursaries will be administered through the Skills and Development Committee and the Human Capital Department.
- 10.3 Applicants must complete and sign the 'Bursary Application Form' and submit to Human Capital department with the required supporting documents.
- 10.4 Payments for registration will be made directly to the relevant educational Institution upon receipt of proof of acceptance and/or registration. It shall be the Beneficiary's responsibility to liaise with the learning institution with regards to the course fees.
- 10.5 It is Beneficiary's responsibility to ensure that the Institution is registered and/or accredited.
- 10.6 The Beneficiary shall provide copies of all relevant academic certificates, testimonials, and progress reports, where applicable.
- 10.7 The Beneficiary shall keep the Human Capital Department informed of his / her academic progress; i.e. submit all examination results, updates on any change of status e.g. cancellation, discontinued studies, postponed examinations, etc. These updates must be given/submitted to the Human Capital department within 30 days from official confirmation of the event/outcome.
- 10.8 The Company shall allocate an annual budgeted amount for Bursaries that will provide guidance on how many Beneficiaries may be assisted each year.

11. RESEARCH STUDIES

11.1 In a case where employees wish to use the Company in the completion of their studies, specifically in the completion of their research or any other assignments or case study work, the following principles will apply:

11.1.1 Requests to the Company in studies must be submitted to the employee's direct Line Manager for approval. Approval is subject to consultation with the Chief Executive Officer of the company and the approval of the information owner.

11.1.2 The Legal Department and Information Technology department must be involved in the process.

11.1.3 All approved documents must be submitted to Human Capital department for record keeping.

12. EXTENDED STUDY

The Company may at its sole discretion, grant permission to an employee who due to ill health and other good reasons, have to spend more time obtaining the relevant qualifications than the officially prescribed period of study, provided that the Company's assistance will be limited to standard registration, tuition and examination fees.

In a case of circumstantial cases whereby courses were not completed on record time or withdrawn due to ill-health and other unforeseen circumstances, a formal motivation/report entailing the circumstances that prohibited the beneficiary from continuing with his/her studies must be submitted to Human Capital.

The company will in its discretion determine the validity of the submission and make a decision.

13. ROLES AND RESPONSIBILITIES

The Roles and Responsibilities are outlined on company's Training and Development Procedure (Annexure C attached).

14. ANNEXURES

Annexure "A" : The Bursary & Study Scheme Application Form

Annexure "B" : Bursary Agreement

Annexure "C" : Training & Formal-Education Bursary Process and Procedure

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