



higher education
& training

Department:
Higher Education and Training
REPUBLIC OF SOUTH AFRICA

**RULES AND GUIDELINES FOR THE ADMINISTRATION AND MANAGEMENT OF THE
DEPARTMENT OF HIGHER EDUCATION AND TRAINING TECHNICAL AND
VOCATIONAL EDUCATION AND TRAINING COLLEGE BURSARY SCHEME FOR 2017**

“Opening the doors of learning is as important today as it was when the Freedom Charter was written”. Dr Blade Nzimande, Minister of Higher Education and Training (Green Paper on Post-School Education and Training)

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ACRONYMS

DG:	Director-General
DDG:	Deputy-Director General
DHET:	Department of Higher Education and Training
FAC:	Financial Aid Committee
FAL:	First Additional Language
FAO:	Financial Aid Officer
FTE:	Full time equivalent
ID:	Identity Document
NC(V):	National Certificate (Vocational)
NQF:	National Qualifications Framework
NSC:	National Senior Certificate
NSDS III:	National Skills Development Strategy III
NSFAS:	National Student Financial Aid Scheme
NSF-TVET Colleges:	National Norms and Standards for Funding Technical and Vocational Education and Training Colleges
PDE:	Provincial Departments of Education
Report 191:	National Education Policy, formal Technical Colleges Instructional Programmes in the RSA
SASSA	South African Social Security Agency
SoP:	Schedule of Particulars (Agreement between NSFAS and a student)
SRC:	Student Representative Council
SSS:	Student Support Services
TVET:	Technical and Vocational Education and Training
Umalusi:	Council for Quality Assurance in General and Further Education and Training
VCET:	Vocational and Continuing Education and Training

PURPOSE

The purpose of this document is to provide the National Student Financial Aid Scheme (NSFAS) and Technical and Vocational Education and Training (TVET) colleges with the rules and guidelines for the administration, management, and awarding of bursaries to qualifying students.

POLICY AND LEGAL CONTEXT

These rules and guidelines have been developed in accordance with the “*2008 National Norms and Standards for Funding Further Education and Training Colleges (NSF-FET Colleges)*”. In terms of the Continuing Education and Training Act, 2006, the Minister of Higher Education and Training must determine policy on the norms and standards for funding TVET Colleges. To this effect, in 2009, the Minister promulgated the *National Norms and Standards for funding FET Colleges*, hereafter referred to as the “*NSF-TVET Colleges*”. Due to the name change from “FET” to “TVET” (i.e. Technical and Vocational Education and Training) the Norms and Standards for Funding FET Colleges are now referred to as the “*NSF-TVET Colleges*”.

1. In terms of the NSF-TVET Colleges, each student enrolled in a state-funded programme must be subsidised by the state at 80% of the total programme cost. The difference of 20% of the total programme costs, which constitute College fees, must be recovered from the student.
2. In order to ensure that College fees do not constitute a barrier to access to state-funded programmes, paragraph 73 of the *NSF-TVET Colleges*, and paragraph 5.2.4 of the *National Plan for Further Education and Training Colleges in South Africa, 2008*; state that the Government shall establish and maintain a national TVET College bursary system and the administration of this bursary scheme will be by NSFAS. This is to ensure that academically deserving and yet financially needy students gain access to education and training opportunities in TVET Colleges. The bursary amount covers the 20% portion of student fees for academically deserving and financially needy students.
3. Paragraph 73 of the *NSF-TVET Colleges* and paragraph 5.2.4 of the *National Plan for Further Education and Training Colleges in South Africa, 2008* further require the Department to develop rules and guidelines for the administration and management of the TVET College Bursary Scheme. This document must therefore be understood against this policy injunction.

4. To gain a comprehensive understanding of the legal and the policy framework that underpins the TVET College Bursary Scheme, these rules and guidelines must be read in conjunction with:
 - 4.1 *National Student Financial Aid Scheme Act, 1999 (as amended);*
 - 4.2 *Continuing Education and Training Act, 2006 (as amended);*
 - 4.3 *The National Plan for Further Education and Training Colleges in South Africa, 2008;*
 - 4.4 *National Norms and Standards for Funding Further Education and Training Colleges, 2009;*
 - 4.5 *The extension of phasing out of the National N Certificates: N1 – N3 (Engineering Studies), Government Gazette No. 33793;*
 - 4.6 *The extension of the offering of National N Certificates: N4 – N6, Government Gazette No. 33794;*
 - 4.7 *Approval of the policy document Formal TVET College programmes at Levels 2 to 4 of the NQF, Government Gazette No. 33795;*
 - 4.8 *Report of the Ministerial Committee on the Review of the National Student Financial Aid Scheme;*
 - 4.9 *DHET TVET College Student Attendance and Punctuality Policy, 2013;*
 - 4.10 *NSFAS Guidelines and Regulations, as codified within the NSFAS Student Funding Policy and the NSFAS Handbook; and*
 - 4.11 *DHET Bursary Administration Improvement Manual, 2013.*
5. Pursuant to the commitment made in the policy and legislation cited above, in 2007, for the first time in the history of TVET Colleges, a bursary scheme was introduced as a means to improve access to priority vocational programmes offered at TVET Colleges.
6. The provision of student financial aid is critical for enabling access to TVET Colleges. The role of TVET Colleges as the nucleus of skills development in South Africa is explicitly contained in the National Skills Development Strategy (NSDS) III published in January 2011 by Minister Nzimande. The challenge of access to post-school education and training opportunities for academically deserving students but financially needy students is addressed by the bursary scheme.
7. The permissible bursary awards are updated annually. Refer to paragraph 38 below for amounts for travel and accommodation as well as the programme costs of the 2017 academic

year. Programme costs for the following year will be sent separately to Colleges before the end of September of each year.

BURSARY FUNDS ALLOCATION CRITERIA TO COLLEGES

8. The Department allocates bursary funds to Colleges on an annual basis taking the following into consideration:
 - 8.1 Programme costs in accordance with the NSF-TVET Colleges;
 - 8.2 DHET approved actual National Certificate (Vocational) (NC(V)) and Report 191 enrolments;
 - 8.3 Students' academic performance and retention rates in NC(V) and Report 191 programmes;
 - 8.4 College fees; and
 - 8.5 Available funding.

9. Accurate and fair distribution of the bursary funds is of paramount importance. These principles are applied to the Full Time Equivalent (FTE) enrolment figures finalised by the end of February of each year. Paragraph 13 of the *NSF-TVET Colleges* outlines the following as three key components of the funding formula:
 - 9.1 The first component is the government subsidy which covers 80% of the programme costs;
 - 9.2 The second component is placing a cap on College level fees, thus limiting the portion of programme cost which may be charged to 20% of the programme cost; and
 - 9.3 The third and last component is the establishment of a national bursary scheme to ensure that students who are academically capable but financially needy are assisted to cover their College fees.

10. **Taking into account the components of the funding formula, the National Student Financial Aid Scheme (NSFAS) and Colleges must first and foremost prioritise the awarding of College fees to qualifying students. Prioritisation of College fees is intended to protect the College and the student from unnecessary debt related to College fees. Full payment of College fees is critical as it enables Colleges to execute their core mandate of providing quality teaching and learning. Colleges must earmark the MINIMUM of 70% of the total bursary allocation to cover the College fees of qualifying students.**

11. **Colleges may consider applications for travel and accommodation allowances subject to the availability of funds. In cases where funds available for allowances, Colleges must earmark the MAXIMUM of 30% of the total bursary allocation to cover allowances of qualifying students. Colleges may use their discretion to effect an upward deviation of not more than 5% for allowances. However, Colleges which intend to effect an upward deviation of more than 5% on the funds earmarked for allowances must submit a formal request together with a detailed motivation to the Director-General for consideration and approval.**

STUDENT ELIGIBILITY CRITERIA FOR THE DHET TVET COLLEGE BURSARY SCHEME

12. In applying for a DHET TVET College bursary, a student must meet the following eligibility criteria:
 - 12.1 Only South African citizens are eligible for this bursary scheme;
 - 12.2 A student must be registered or intending to register on an NC(V) or Report 191 programme at any of the fifty (50) public TVET Colleges in South Africa;
 - 12.3 In need of financial assistance (a Means Test is administered to determine whether or not a student meets this criterion. A Means Test is an electronic tool used to determine the level of financial need of students); and
 - 12.4 An ability to demonstrate potential for academic success / or proven academic performance (academically deserving).

MINIMUM REQUIRED DOCUMENTATION

13. **A student who is Means-Test waived only needs to provide a certified copy of her/his Identity Document** (certified copy of the student's Identity Document or certified copy of the birth certificate if NOT older than 18 years).
14. To be deemed acceptable for processing, it is compulsory that a bursary application form of a student who is not Means-Test waived must have the following supporting documents:
 - 14.1 Identity Document of the applicant (certified copy of the student's Identity Document or certified copy of the birth certificate if NOT older than 18 years);
 - 14.2 Registration documents (statement of results or academic record and a printed proof of registration);

- 14.3 Other Identity Documents (certified copies of Identity Documents of **both** parents or guardian or spouse; certified copies of Identity Documents and/or certified copies of birth certificates of other members in the household; a certified copy of the death certificate if one or both of the parents is/are deceased; an affidavit if the student does not know the whereabouts of one or both of their parents);
- 14.4 Employment documents (Salary advice slips not older than three (3) months of the guardian or **both** parents; a South African Social Security Agency (SASSA) letter or pension slip if the guardian or parents are pensioners; an affidavit if the guardian or parents are unemployed). In capturing data into the Means Test, please note that a pension and a child grant should NOT be regarded as a form of income;
- 14.5 Proof of residential address (In line with the Financial Intelligence Centre Act 83 of 2001, NSFAS needs to obtain FICA documentation on first contact with the student. So in addition to the certified ID, a certified copy of proof of address is required. This proof of residence will need to be supplied to NSFAS upon application. Such proof could be in any of the following forms: bank statement; letter from a traditional authority confirming that an individual (or business) is permitted to reside (or operate) on communal land; signed by the relevant traditional authority and stamped with a stamp issued by government; any government issued document: e.g. court order, subpoena, traffic fine, etc. or documentation relating to UIF and/or pension payouts, etc.; correspondence from a Body Corporate / Share Block Association; documentation from an insurance or assurance company, e.g. life assurance, short term insurance, health insurance / medical aid, funeral policies, etc.; television license documentation; telephone account (e.g. Telkom); SARS document which includes: a document produced by SARS or a document to be used for tax purposes, e.g. IT12S, IRP5, IT3b, etc.; a rental / lease agreement; a mortgage statement from another mortgage lender; an investment statement from another Investment Provider, e.g. share, portfolio or unit trust statements; or an affidavit deposited to by the person with whom the student resides);
- 14.6 Travel and Accommodation documents (if applicable) attached as copies of rental agreements.

15. If there are no certified supporting documents, an affidavit from the relevant member(s) of the household must be submitted by the student. In respect of an unemployed parent, it is the parent and not the student, who must submit an affidavit. Such affidavits are documents issued by the office of the South African Police Service (SAPS). However, affidavits should be the last resort in terms of supporting documents, and should only be submitted if other supporting documents are not available.

EXEMPTION FROM PAYING REGISTRATION FEES

16. Students who are NSFAS beneficiaries must not be required to pay registration fees. Colleges may not exclude such students on the basis of their inability to pay registration fees. The advance payment is specifically for the purpose of exempting such students from paying registration fees and for paying travel and accommodation allowances of qualifying students.

BURSARY ADMINISTRATION PROCESS

17. The NSFAS manages and administers the Department's TVET College Bursary Scheme on behalf of the Department. NSFAS has adapted the Means Test tool for the TVET College sector.
18. **A student must either complete an electronic bursary application form and submit all supporting documents (cf. Template A) online at www.nsfas.org.za OR complete the hard copy of the bursary application form obtained from the College and submit all supporting documents which the College will ultimately submit to NSFAS.**
19. **Colleges must ensure that there is a support system in place for online applications (such as access to computer laboratory, internet connectivity, guidance with lodging applications, accepting of Schedule of Particulars, etc.)**
20. Returning NSFAS bursary beneficiaries who have had NO break in funding or studies, must NOT apply again. NSFAS will process their bursary application using the previous examination results obtained directly from the Department.
21. All bursary applications must be thoroughly checked by NSFAS and the College officials prior to being accepted from the student (cf. par. 14 and Template A). NSFAS and Colleges WILL not accept incomplete bursary application forms from students. To accept a form from a student implies that such a student has submitted all the required documentation.

22. Any College receiving application forms on behalf of NSFAS must acknowledge receipt of the bursary application form with the necessary supporting documents, and use a register/receipt book to confirm receipt.
23. NSFAS must submit a list of complete online applications to Colleges at intervals to be determined and communicated by NSFAS. Once NSFAS has made a determination on a complete bursary application it must communicate the outcome to both successful and unsuccessful applicants in writing or through Short Message Service (SMS). The communication to unsuccessful applicants must provide the specific reason(s) for declining the application. Lists of names of successful and unsuccessful bursary applicants must be sent to Colleges regularly.
24. Successful applicants must accept/sign the Schedule of Particulars (SoP) within 5 working days of receipt of notification from NSFAS. A list of successful applicants who have not accepted the SoP online within 5 working days must be sent to the College for its intervention.
25. NSFAS and Colleges must administer bursaries according to the Bursary Administration Schedule in the Table below. The minimum percentage of the College's allocation has to be claimed by the specified due dates. The Department and NSFAS will, as at 30 September of each year, regard the balance in a College's bursary allocation as unspent bursary funds for that particular year. These unspent bursary funds will be re-distributed to Colleges that requested additional bursary funds and had claimed their full bursary allocation as at 30 September of that particular year.

BURSARY ADMINISTRATION SCHEDULE

Activity	Responsibility	Date
Submission of the schedule of meetings of the Financial Aid Committee (FAC) together with the list of FAC members and their contact details	Colleges	31 January of each year
Submission of reports of compliance to the 80% minimum class attendance requirement to NSFAS	Principals	Monthly
Final bursary allocations released for each academic year	DHET	31 March of each year
50% of the total bursary allocation claimed/signed for by students	Colleges	30 April of each year
75% of the total bursary allocation claimed/signed for by students	Colleges	30 June of each year
Issuing of programme costs to Colleges for the following year	DHET	30 August of each year
Student bursary applications open for the following year	Colleges	1 September of each year
100% of the total bursary allocation claimed/signed for by students	Colleges	30 September of each year
Bursary Administration and Management workshops for the following year	DHET & NSFAS	October/ November of each year
Provisional bursary allocations released for the following year	DHET	30 November of each year

ROLE OF THE FINANCIAL AID AND APPEALS COMMITTEES

26. The introduction of the NSFAS centralised bursary management system does not imply that Colleges participating in the pilot do not need to have a Financial Aid Committee (FAC). The functions of the Financial Aid Committee include but are not limited to the following:
 - 26.1 Enforces strict compliance to the Bursary Rules and Guidelines;
 - 26.2 Promotes honest and transparent bursary administration processes;
 - 26.3 Oversees utilisation of the College bursary allocation (such as accepting of SoPs online, payment of allowances to beneficiaries, crediting of student accounts, etc.);
 - 26.4 Develops the criteria for awarding allowances;**
 - 26.5 Adjudicates on applications for allowances; and**
 - 26.6 Decides on the size/amount of the student allowances (such a decision must be informed by a research into local economic activities).**
27. The above-mentioned functions of the Financial Aid Committee will evolve as part of the transition stage to the NSFAS centralised bursary management system. The Financial Aid Committee (FAC) must have, at a minimum, one meeting per month to monitor bursary administration processes. Detailed minutes of the FAC meetings must be kept.
28. The Financial Aid Committee should be a stakeholder-inclusive structure that includes representation from:
 - 28.1 Student Support Services;
 - 28.2 Finance;
 - 28.3 Corporate Services;
 - 28.4 Student Representative Council (2 central SRC members and 1 SRC member per campus);
 - 28.5 Marketing; and
 - 28.6 Management (including campus managers).
29. The College principal may use his/her discretion to add other representatives to the Financial Aid Committee. The College must submit a schedule of meetings as well as the letter reflecting the names and contact details of all the members of the Financial Aid Committee and the Bursary Appeals Committee to the Department before the end of January of each year (the letter must be signed by the College Principal).

30. The Financial Aid Committee must keep record of all its meetings (minutes), which may be required for audit purposes, especially in respect of decisions which impact on the bursary awards to students.
31. The Financial Aid Committee must forward its recommendations in respect of the applications for allowances to the Principal for approval. Payments made to Colleges will not exceed the College's final bursary allocation, as confirmed by the Department.
32. It is important for the Principal, as the College's Accounting Officer, to validate the process through his/her signature. An imprint of his/her name and the date on which the signature was appended to the report/claim should accompany the Principal's signature. If the Principal has delegated the responsibility, the letter of delegation must be enclosed.
33. The College must credit the accounts of all successful applicants within two weeks of the College having received bursary funds and a list of bursary beneficiaries from NSFAS. Furthermore, the campus finance office must provide successful applicants with copies of their statements within two weeks of the College having received payment from NSFAS. All unsuccessful applicants are liable for payment of their College fees, subject to the outcome of the appeal process. An unsuccessful applicant who intends to contest the decision of NSFAS or the College Financial Aid Committee must lodge an appeal in writing with NSFAS or the College Bursary Appeals Committee within ten (10) working days of having received the outcome of his/her bursary application.
34. NSFAS and the College Financial Aid Committee must formulate and provide a template which unsuccessful applicants must use to lodge an appeal. NSFAS and Colleges are required to keep an Appeals Register of students who have contested the decisions made on their bursary applications.
35. **The role of the Bursary Appeals Committee is to consider student appeals and to make recommendations to NSFAS in respect of appeals that are submitted to NSFAS and/or the College.**
36. A College should set up a Bursary Appeals Committee which should be constituted as follows:
 - 36.1 College Principal;

- 36.2 Vice Principal: Academic;
- 36.3 Chief Financial Officer;
- 36.4 SSS Manager (Financial Aid Officer); and
- 36.5 President of the SRC (or the Deputy President of the SRC if the appeal is lodged by the President).

The College principal may use his/her discretion to add other representatives to the Bursary Appeals Committee.

CRITERIA FOR AWARDING BURSARIES TO STUDENTS

- 37. NSFAS must use the criteria below when awarding bursaries to students:
 - 37.1 In making a determination on the bursary applications, NSFAS must consider the bursary application together with the supporting documents (refer to Template A) and the results of the Means Test;
 - 37.2 The financial need of the student must be assessed using the NSFAS Means Test tool when awarding bursaries to students. Students **MUST** provide details on the employment status of both of their parents or guardian as these impact on the eligibility for bursaries. In this regard, students must submit a death certificate if one/both parent(s) is/are deceased or an affidavit if they do not know their whereabouts. The submission of the particulars of both parents is compulsory as it has a bearing on the Expected Family Contribution (EFC) rating, i.e. the financial need rating. An application that does not have particulars of both parents is incomplete and therefore it must **NOT** be accepted. The administration of the Means Test is compulsory and evidence of such administration must be retained at NSFAS for audit purposes. **The financial need of the student will be assessed at the point of first application, and students will not need to re-apply annually;**
 - 37.3 The academic merit of the student must be assessed by NSFAS using an academic record or statement of results when awarding bursaries to students. To this end, students must be given priority in terms of their academic ratings;
 - 37.4 Bursaries are awarded to the most deserving students on the basis of their highest degree of financial need and best academic performance, and as such, students meeting

the entry requirements into an NC(V) or Report 191 programme is not sufficient for a student to qualify for a bursary award. All NC(V) and Report 191 bursary recipients who FAIL to progress to the next level of their studies should NOT be awarded a bursary to repeat a level that they failed;

- 37.5 The bursaries should be awarded against an approved and signed/accepted agreement/contract between NSFAS and the student – this agreement/contract is referred to as the Schedule of Particulars (SoP). It is important to note that only the students who have been awarded bursaries are required to sign/accept the SoP. The SoP without an agreed amount between NSFAS and the student should be regarded as an invalid contract. **Qualifying students will sign/accept one SoP for the duration of their NC(V) or Report 191 programme provided they do not fail during the course of their studies;**
- 37.6 For new NC(V) Level 2 and Report 191 (N1 and N4) students, academic criteria must be applied using the school report, National Senior Certificate and N3 statement of results. NSFAS and the College Financial Aid Committee must review documented evidence of satisfactory academic performance in awarding bursaries to students enrolling in Level 2 and N1 and N4 programmes. NSFAS must verify the authenticity of schools and school reports that appear suspicious (i.e. without a school logo, address, Headmaster signature, etc.). To this end, NSFAS must contact the Provincial Education Department where the public or independent school is located. In respect of independent (private) schools, their operation is regulated in terms of the *South African Schools Act, 1996*. In terms of this Act an independent school must be registered with the Provincial Education Department where the school is located;
- 37.7 Applicants who were awarded bursaries for NC(V) Levels 2 or 3 in the previous year, and who have performed well academically in the previous academic year, and are therefore progressing to the next Level, should be prioritised for bursaries for NC(V) Level 3 or Level 4 in the current year taking into account the College policy on student progression and the availability of funds;
- 37.8 A bursary may only be awarded to students progressing to the next NC(V) Level if they passed at least 5 subjects in the previous NC(V) level. This requirement will be phased in

for students progressing to NC(V) Level 3 in 2017 and NC(V) level 4 in 2018. Colleges were required to ensure that students who registered for NC(V) Level 2 in 2016 were made aware of this requirement;

37.9 On application, Report 191 students apply for all semester or trimester courses for the duration of the programme. Applicants who were awarded bursaries for Report 191 N1 to N5 in the previous semester/trimester, and who have performed well academically in the previous semester/trimester, and are therefore progressing to the next N-level, should be prioritized for bursaries for Report 191 N2 to N6 in the current semester/trimester taking into account the availability of funds. **A bursary may only be awarded to students if they passed a minimum of 3 subjects in the previous N-Level;**

37.10 Students may be awarded bursaries up to a maximum of four years for the NC(V) programme. The fourth year bursary should be awarded only in the fourth year of study (after Level 4) to allow students to complete any outstanding subjects. The applications for travel and accommodation allowances of this cohort of students may be considered subject to the availability of funds. This provision is only applicable to continuous study (i.e. to enable students to complete outstanding subjects) and on a pro-rata basis. No bursaries should be awarded in the fifth year of study;

37.11 Report 191 students may be awarded bursaries if they passed at least 3 subjects at N3 and N6 and have one outstanding subject. The applications for travel and accommodation allowances of this cohort of students may be considered subject to the availability of funds. This provision is made for a period of four or six months and it is applicable to continuous study which will be paid on a pro-rata basis, i.e. proportional for one trimester or one semester to complete one subject;

37.12 Where bursaries are awarded for outstanding subjects only, the costs per subject should be calculated as follows:

37.12.1 NC(V) cost per subject: Programme cost (20% which is the student College fee) is divided by 7. Refer to paragraph 38 below and the programme costs of the current academic year; and

37.12.2 Report 191 cost per subject: Programme cost (20% which is the student College fee) is divided by 8 for semester programmes and it is divided by 12 for

trimester programmes. Refer to paragraph 38 below and the programme costs of the current academic year;

37.13 Bursary recipients who switch from one programme to another (i.e. from NC(V) to Report 191 programme N1 – N3 or vice-versa) or change programmes within an NC(V) or Report 191 programme during the course of their studies are not eligible for financial assistance. Furthermore, bursary recipients who complete NC(V) Level 4 are not eligible for financial assistance should they want to enroll for another NC(V) programme or Report 191 programme N1 – N3; similarly bursary recipients who complete Report 191 N4 - N6 are not eligible for financial assistance should they want to enroll for another Report 191 programme N4 - N6 or an NC(V) programme. However, bursary recipients who complete NC(V) Level 4 are eligible for financial assistance for an additional two year period, should they want to enroll for Report 191 (N4 – N6);

37.14 Umalusi recognises credit transfer between the National Senior Certificate (NSC) and the NC(V) in the following subjects:

- 37.14.1 English Home Language or First Additional Language (passed at 40% and above);
- 37.14.2 Mathematics (passed at 30% and above);
- 37.14.3 Mathematical Literacy (passed at 30% and above); and
- 37.14.4 Physical Science (passed at 50% and above).

The formula in paragraph 37.12 above should also be used to determine the bursary award for NC(V) students with credit transfer from one or more NSC subjects; and

37.15 NSFAS regulations state that no refunds will be made if there is a balance in the student's account after his/her account has been settled. No student will receive cash payment or a refund from NSFAS/the College at the end of the year in respect of a bursary award granted to the student for the payment of fees or other expenses. Re-allocation of unutilised bursary funds of students who drop out from the College during the course of their studies has audit implications, and as such, the College must not consider such course of action. Colleges must return unutilised funds to NSFAS for redistribution.

38. The Table below indicates items that may be claimed from the bursary. All costs listed in the Table below are **MAXIMUM** amounts that may be awarded to students in 2017. **The awarding**

of the items will be based on the recommendations of College Financial Aid Committee which may be approved by the Principal subject to the availability of funds. All costs are per annum for the 2017 academic year.

Item	Cost	Comment
College fees: NC(V) and Report 191 programmes	Full cost of College fees as indicated in the programme costs of the current academic year	Limited to one NC(V) or Report 191 programme per student per annum.
Travel	R7 864	Accommodation and travel allowance must be awarded in an accountable manner. Where funds are paid to students a meticulous system of records of payments made must be kept. NSFAS will pay allowances directly to College students via SBUX ¹ .
Accommodation	R20 970	

Note: College accommodation is inclusive of meals (Colleges and landlords for private accommodation must provide at least three meals a day).

All the above amounts are **MAXIMUM** amounts that may be awarded for 2017 and must not be exceeded.

AWARDING OF TRAVEL AND ACCOMMODATION ALLOWANCES

39. Students who are awarded travel allowance must not be considered for an accommodation allowance and vice-versa. **An allowance must NOT be perceived as an entitlement but rather as a means of support which may be awarded to a student on the basis of academic performance, subject to availability of funds.**

40. **The first priority must always be to cover College fees and if there are funds still available, travel or accommodation allowances may be considered. NSFAS is responsible for making a determination on whether student applications are successful or unsuccessful. However, given their unique circumstances Colleges are best placed to make a determination on the applications for travel and accommodation allowances subject to the availability of funds. In this regard, it is the responsibility of the College Financial Aid Committee to perform the following functions:**
 - 41.1 **Develop the criteria for awarding allowances (prioritise applicants on the basis of academic excellence);**
 - 41.2 **Adjudicate on the applications for allowances; and**

¹ SBUX refers to an electronic cellphone system through which payment of allowances can be made to students

41.3 Decide on the size/amount of the awards for allowances (such a decision must be informed by a research into local economic activities).

41. Notwithstanding the distance requirement for awarding allowances (cf. par. 42 and 45), the College Financial Aid Committee must take into account the following academic ratings as per the Means Test:

41.1 Academic rating 1 (80% - 100%);

41.2 Academic rating 2 (70% - 79%);

41.3 Academic rating 3 (60% - 69%);

41.4 Academic rating 4 (50% - 59%);

41.5 Academic rating 5 (40% - 49%);

41.6 Academic rating 6 (30% - 39%); and

41.7 Academic rating 7 (0% - 29%).

Taking into account limited funding for awarding allowances, the College Financial Aid Committee must decide on which of the academic ratings/categories listed above to prioritise for allowances.

42. The amounts awarded for travel may vary from one student to another depending on the distance that each student has to travel to get to the College. In making a final determination on the award for transport allowance, the Financial Aid Committee must consider, *inter alia*, the distance travelled by the student to get to the College, the actual transport costs (supporting documents must be obtained from the local taxi/bus/train association), and available bursary allocation to cover these additional awards. Students who reside within a radius of ten (10) kilometres from the College should not be considered for an award for travel allowance or accommodation allowance. **However, students who reside further than ten (10) kilometres from the College may be considered for an award for travel allowance, subject to the availability of funds. Students who reside between five (5) and ten (10) kilometres from the College may also be considered for an award for travel allowance provided all qualifying students who reside further than 10 kilometres from the College have been covered and there is available funding.** It should therefore be noted that the actual transport allowance that will be awarded to each student is likely to vary and may be less than the R7 864 earmarked as the absolute maximum that a College can award for travel per student per annum.

43. The amounts awarded for accommodation for students in private accommodation may vary from one student to another. Students must only consider private accommodation if College residences are already full to capacity or in instances where the TVET College does not have student residential facilities. In making a final determination on the award for accommodation allowance, the College Financial Aid Committee must consider, inter alia, the actual accommodation costs and a rental agreement. Payments for private accommodation will be made through sBux.
- 44. Landlords for private accommodation must be accredited by the TVET College first before they can be signed up as a merchant for sBux as per the NSFAS guidelines. Colleges need to perform periodic inspections, at least quarterly, of the premises occupied by students. Colleges must ensure that both landlords and students sign rental agreements, so that these costs can be added to the registration template. Students will transfer vouchers issued to them for accommodation to the landlords concerned, and these landlords will redeem their vouchers directly with NSFAS.**
45. Students whose home address is within a radius of forty (40) kilometres from the College should not be considered for an award for accommodation allowance (this cohort of students may be considered for an award for travel allowance, provided they do not reside within a radius of ten (10) kilometres from the College). **However, students whose home address is further than forty (40) kilometres from the College may be considered for an award for accommodation allowance, subject to the availability of funds.** It should therefore be noted that the actual accommodation allowance that will be awarded to each student is likely to vary and **may be less** than the R20 970 earmarked as the absolute maximum that a College can award for accommodation per student per annum.
46. In making a final determination on the award for travel and accommodation allowances, the Financial Aid Committee must not “top-slice” the award, i.e. the practice of reducing the size of a bursary award in order to spread the funds to greater numbers of qualifying students. This practice militates against the purpose of the award for travel and accommodation (cf. par. 47) as students who are awarded a portion of their allowance are at risk of dropping out in the event that their families cannot afford to contribute funds to cover the student’s shortfall to attend classes.

DISBURSEMENT OF TRAVEL AND ACCOMMODATION ALLOWANCES

47. The award for travel and accommodation is intended to improve the retention rates in the College sector, thereby promoting student access. In order to promote student attendance, it is mandatory that student allowances for travel and accommodation be issued in tranches rather than as a lump sum at the start of the academic year. The minimum requirement of 80% class attendance must be taken into account monthly when determining whether or not to continue making payments for the transport and accommodation allowance tranches. Therefore, the release of student allowances for travel and accommodation must be dependent on the 80% minimum student class attendance for all subjects the student is registered for. The first tranche should be paid to qualifying students in advance and, based on student adherence to the 80% minimum class attendance, the subsequent tranche should then be paid.
48. **NSFAS must link payment of travel and accommodation allowances with the students' compliance with the Department's *TVET College Attendance and Punctuality Policy, 2013*. The attendance and punctuality policy was developed to improve retention and pass rates of all students in the TVET College sector and thus all TVET College students are required to strictly comply with the policy irrespective of them being NSFAS bursary beneficiaries or not. Notwithstanding limited bursary funding, compliance with the attendance and punctuality policy is NOT dependent on the outcome of the application for allowances and/or availability of funding for allowances.**
49. **NSFAS will pay travel and accommodation allowances directly to students through sBux instead of the service providers. Colleges which currently have contracts with the service providers for the provision of travel and accommodation services must not renew them upon expiry of such contracts.**
50. NSFAS must not disburse NSFAS travel and accommodation allowances to a beneficiary who fails to meet the minimum 80% class attendance requirement for a particular month in accordance with the *DHET TVET College Student Attendance and Punctuality Policy, 2013*. The monitoring of class attendance by the responsible lecturer for each scheduled class is critical. Principals of Colleges must monitor and keep accurate records of student attendance for each scheduled class. The Principals of Colleges must submit, on a monthly basis, a consolidated report on compliance of NSFAS travel and accommodation beneficiaries with the requirement

of 80% minimum class attendance to the Executive Officer of NSFAS. The funds that will be accumulated from the travel and accommodation allowances as a result of students failing to comply with the requirement of 80% minimum class attendance or dropping out from the College must be returned to NSFAS at the end of the academic year.

51. College and NSFAS employees are not allowed to provide travel and accommodation services to beneficiaries of the DHET TVET College Bursary Scheme. This practice constitutes a conflict of interest and it is imperative that the College, through its Council, and the NSFAS Board formulate a policy barring this practice.

VERIFICATION OF RESIDENTIAL ADDRESSES OF THE RECIPIENTS OF ALLOWANCES

52. The Department has discovered alarming high levels of fraud and corruption involved in the awarding of travel and accommodation allowances to students. This discovery necessitates College verification of residential addresses of beneficiaries of travel and accommodation allowances (while studying) to ascertain the validity of these awards. Debt collecting agencies may be utilised to conduct physical address verification of preferably a sample of 10 – 25% randomly selected students receiving travel and accommodation allowances.
53. Colleges must keep bi-annual reports on verification of residential addresses of beneficiaries of travel and accommodation allowances for audit purposes. On the basis of the analysis of these reports, the Principal should decide whether or not it is necessary to institute a forensic investigation into the administration of these allowances. Students and College officials who are found to have defrauded the DHET TVET College Bursary Scheme should be subjected to an internal disciplinary hearing and should also have criminal charges laid against them. In the event that these suspects are found guilty, the relevant sanctions should apply which may include withdrawal of the bursary, cancellation of allowances, disqualification from ever applying for a NSFAS bursary in future, re-payment, expulsion/dismissal, etc.

ADDITIONAL NSFAS AND COLLEGE RESPONSIBILITIES

54. Colleges must take responsibility for and take note of the following:
 - 53.1 Informing students of the criteria that are applicable for the awarding of bursaries, i.e. financial need, academic performance, class attendance, etc.;

- 53.2 Informing students of all important documents to be submitted with their bursary applications;
- 53.3 Developing a document checklist (cf. Template A) to ensure that all relevant documents are received;
- 53.4 Application forms with incomplete documents should not be accepted. If there are queries on submitted documents, the student must be notified immediately;
- 53.5 Furnishing students with proof of submission of application forms and supporting documents;
- 53.6 Bursary agreements (Schedule of Particulars) should be signed/accepted by the student and NSFAS; and
- 53.7 Students should be made aware of their rights, roles and responsibilities, e.g. notification of other bursaries or change of address, etc.

MONITORING AND SUPPORT

- 55. The Department, its regional offices and Principals will conduct regular monitoring and support of the DHET TVET College Bursary Scheme administration at Colleges. Colleges are encouraged to contact the regional office, the Department and NSFAS when support is needed. The *Bursary Administration Monitoring Tool* (cf. Template D) must be used to monitor and evaluate the College's administration and management of the Department's TVET College Bursary Scheme.

MARKETING

- 56. The first point of marketing should be the NC(V) or Report 191 programmes, then the bursary scheme as a possible access tool to the College and programme offerings.
- 57. It is the responsibility of the College to develop a marketing strategy for the bursary and to market the availability of bursaries to the students in a responsible and accountable manner. It is critical that the bursaries are marketed as the Department of Higher Education and Training (DHET) TVET College Bursary Scheme (DHET TVET College Bursary Scheme). It is important for the name of the scheme to be presented in a consistent manner to avoid confusion with other bursaries that may be on offer.

58. Colleges are advised not to guarantee students bursaries when recruiting, since bursary awards are subject to bursary administration processes and the availability of funding as outlined in this document.
59. Colleges should communicate the bursary process in classes, during orientation and induction, through internal and external newsletters, brochures, posters, College website, newspapers and other means the College may deem appropriate.
60. Closing dates for the submission of bursary application forms should be stated very clearly in the advertisements issued by Colleges and on the bursary application forms (where possible).

TEMPLATE A

CHECKLIST FOR BURSARY APPLICATIONS

Supporting Documents		Please tick if included
1.	Certified copy of your Identity Document. If you are younger than 16 years of age, and do not have a green bar-coded ID or smart ID card, you must submit a certified copy of your unabridged birth certificate.	
2.	Certified copy of Identity Document of each household member including parents or legal guardian.	
3.	Certified copy of your latest academic transcript or exam results. If you are currently in Grade 12, you do not need to submit this document.	
4.	If you have been exempted from paying school fees, please provide a letter from the school informing NSFAS that you have been exempted.	
5.	Certified or official copy of recent payslip, letter of employment, not older than three months, for each parent, or the person who supports you, or your guardian or yourself if you are employed. This is for all types of employment or all forms of income for all members of the household. This includes any income received from SASSA grants, Unemployment Insurance Fund (UIF), or any retirement, life, disability or other benefits paid as a lump sum or in monthly payments.	
6.	If your parents or person who supports you or your legal guardian are retired, please provide a copy of an official pension slip or bank statement showing pension payment.	
7.	If your parents or the person who support your or your legal guardian works as an informal trader, please provide an affidavit signed by them to confirm this employment.	
8.	If either of your parents if deceased, please provide a certified copy of the death certificate.	
9.	If your parents are divorced, please provide a certified copy of the divorce decree.	
10.	If either of your parents does not live at home, please provide an affidavit explaining the reasons.	
11.	Certified copy of a SASSA letter if any of your family members are receiving a social grant and are also contributing to your household income. This also applies to your legal guardian.	
12.	If you have indicated that a dependent in your household is a student, please provide proof of registration or acceptance at TVET college or university for each dependent.	
13.	If you have disability, please complete the relevant supporting documents (please see website for details) and submit them with your application form.	

TEMPLATE B

Template: Letter to Successful Applicants

College letterhead

Name of Student:

Student Number:

Identity Number:

Campus:

NATED/NC(V) Programme and Level:

Dear Student

An Outcome of the DHET TVET College Bursary Scheme Application

It is a pleasure to inform you that your application for the Department of Higher Education and Training's Technical and Vocational Education and Training (TVET) College Bursary Scheme was successful. Please be advised that the National Student Financial Aid Scheme (NSFAS) made a determination on your bursary application on the basis of, amongst others, your level of financial need as determined by the Means Test, academic performance, and supporting documents.

You have been awarded a bursary as follows:

Tuition Fees:	R 0.00
Accommodation (if applicable):	R 0.00
Transport (if applicable):	R 0.00
Total:	R 0.00

If you have also been awarded a bursary for travel and accommodation allowances, please note that payment of travel and accommodation allowances is intended to promote your attendance. In the light hereof, the payment of travel and accommodation allowance will therefore be dependent on your class attendance and it will be made into your bank account in tranches (not as a lump sum) on a monthly basis.

Should you require any further information in this regard, please do not hesitate to contact the student liaison officer at your campus.

Yours sincerely

Ms/Mr/Dr/Prof,ABC

Principal: ABC TVET College

Date:

TEMPLATE C

Template: Letter to Unsuccessful Applicants

College letterhead

Name of Student:

Student Number:

Identity Number:

Campus:

NATED/NC(V) Programme and Level:

Dear Student

An Outcome of the DHET TVET College Bursary Scheme Application

We regret to inform you that your application for the Department of Higher Education and Training's Technical and Vocational Education and Training (TVET) College Bursary Scheme was unsuccessful. Please be advised that the National Student Financial Aid Scheme (NSFAS) made a determination on your bursary application on the basis of, amongst others, your level of financial need as determined by the Means Test, academic performance, and supporting documents.

Your application was declined due to the following reason(s):

- The value of your annual household income
- Academic performance
- Your citizenship
- Other (specify) _____

Please note that your parent(s)/guardian is/are therefore responsible for the payment of your College fees. Please inform your parent(s)/guardian to contact the campus manager within ten (10) working days on receipt of this letter to arrange for payment.

In terms of the Rules and Guidelines you are at liberty to lodge an appeal against the decision of the NSFAS should you have reason to believe that the NSFAS erred in its decision to decline your bursary application. In this regard, you will be required, upon receipt of this letter, to lodge an appeal in writing with the NSFAS/Bursary Appeals Committee (BAC) within ten (10) working days. In your

appeal you must state reasons for your appeal and attach documents, if any, that you believe might support your appeal.

Should you require any further information in this regard, please do not hesitate to contact the student liaison officer at your campus.

Yours sincerely

Ms/Mr/Dr/Prof, ABC

Principal: ABC TVET College

Date:

TEMPLATE D

BURSARY ADMINISTRATION MONITORING TOOL				
COLLEGE:			CAMPUS:	
1	COMMUNICATION	YES/ NO	EVIDENCE	REMEDIAL ACTIONS/ COMMENTS
1.1	Acknowledging receipt of bursary applications		<i>Acknowledgement receipts/letters/sms, etc.</i>	
1.2	Exemption of NSFAS beneficiaries from paying registration fees		<i>Booklets, leaflets, etc.</i>	
1.3	Communication of the eligibility criteria		<i>Booklets, leaflets, etc.</i>	
1.4	Issuing of the bursary documentation to the Student Representative Council (SRC) (i.e. <i>allocation letter, Bursary Rules and Guidelines, Awarding criteria, Attendance Policy, etc.</i>)		<i>Allocation letter, Rules and Guidelines, Awarding criteria, Attendance Policy, etc.</i>	
1.5	Issuing of the criteria for awarding bursaries (<i>particularly the awarding of allowances</i>)		<i>Awarding criteria</i>	
1.6	Issuing of the outcome on bursary applications (<i>i.e. to both successful and unsuccessful applicants</i>)		<i>Letters/sms, etc.</i>	
1.7	Notification on receipt of NSFAS payment		<i>Updated statements of student accounts</i>	
2	PROCESSESING OF APPLICATIONS	YES/NO	EVIDENCE	REMEDIAL ACTIONS/COMMENTS
2.1	Capacity building and training of the SRC		<i>Agenda, attendance registers, presentations, reports, etc.</i>	
2.2	Functioning of the Financial Aid Committee (FAC)		<i>Agenda, minutes, attendance registers, etc.</i>	
2.3	Participation of the SRC in the FAC and the Bursary Appeals Committee (BAC) (<i>ideally each campus must have representation in the FAC</i>)		<i>Minutes, attendance registers, etc.</i>	
2.4	Support system in place for lodging online applications and accepting of Schedule of Particulars (<i>i.e. Availability of the computer laboratory, internet connectivity, Financial Aid Practitioners, etc.</i>)		<i>Computer lab, internet connectivity, Financial Aid Practitioners</i>	
2.5	Prioritisation of College fees for qualifying students (<i>no "top slicing" of awards for College fees</i>)		<i>Control lists</i>	
2.6	Adjudication on applications for allowances (<i>best academic achievers prioritised for allowances awards</i>)		<i>Awarding criteria for allowances</i>	
2.7	Avenues available to unsuccessful applicants to lodge an appeal		<i>Appeals template, Appeals Register</i>	

2.8	Adherence to the Bursary Administration Schedule (<i>i.e.</i> 50%, 75% and 100% of the total allocation claimed by 30 April, 30 June and 30 September respectively)		<i>NSFAS payment letters</i>	
2.9	Management oversight over bursary administration processes		<i>Progress reports</i>	
3	DISBURSEMENT OF BURSARY FUNDS	YES/NO	EVIDENCE	REMEDIAL ACTIONS/COMMENTS
3.1	Timeous crediting of the accounts of NSFAS beneficiaries for College fees and allowances		<i>Updated student accounts</i>	
3.2	Timeous payment of allowances linked to compliance with the <i>TVET College Student Attendance and Punctuality Policy, 2013</i>		<i>Monthly attendance registers</i>	
3.3	Verification of residential addresses of recipients of allowances		<i>Bi-annual reports</i>	
4	GENERAL COMMENTS, OBSERVATIONS AND RECOMMENDATIONS			

TEMPLATE E

BURSARY ADMINISTRATION: 2017 ANNUAL WORK PLAN

1ST QUARTER ACTIVITIES (JANUARY – MARCH 2017)			
Activity	Responsibility	Completion Date	Status (Done/Not)
100% student submission of NC(V) & 1 st trimester/semester Report 191 applications	Students	20 January 2017	
Determination on 100% NC(V) & 1 st trimester/semester Report 191 bursary applications	NSFAS	27 February 2017	
100% of successful and unsuccessful NC(V) & 1 st trimester/semester Report 191 applicants informed of the outcome of their applications	NSFAS/Colleges	30 January 2017	
Signing/accepting of SoPs by 100% of successful NC(V) and 1 st trimester/semester students	Students	3 February 2017	
A list of successful applicants who have not accepted the SoP online within 5 working days must be sent to the College for its intervention	NSFAS	6 February 2017	
Receipt of NSFAS payment of 50% NC(V) & 1 st trimester/semester Report 191 bursary claims	Principal/CFO/Finance Manager	17 March 2017	
50% of successful NC(V) & 1 st trimester/semester Report 191 applicants issued with statements reflecting credited accounts	Finance Manager	31 March 2017	

2ND QUARTER ACTIVITIES (APRIL – JUNE 2017)			
Receipt of NSFAS payment of 100% 1 st trimester/semester Report 191 bursary claims	Principal/CFO/Finance Manager	3 April 2017	
100% of successful 1 st trimester/semester Report 191 applicants issued with statements reflecting credited accounts	Finance Manager	17 April 2017	
Receipt of 75% NSFAS payment of NC(V) bursary claims	Principal/CFO/Finance Manager	28 April 2017	
75% of successful NC(V) applicants issued with statements reflecting credited accounts	Finance Manager	12 May 2017	
75% submission of 2 nd trimester Report 191 applications	Students	19 May 2017	
Determination on 100% 2 nd trimester Report 191 applications	NSFAS	26 May 2017	
100% of successful and unsuccessful NC(V) & 2 nd trimester applicants informed of the outcome of their applications	NSFAS/Colleges	29 May 2017	
Signing/accepting of SoPs by 100% of successful NC(V) and 2 nd trimester students	Students	2 June 2017	

A list of successful applicants who have not accepted the SoP online within 5 working days must be sent to the College for its intervention	NSFAS	5 June 2017	
Receipt of 100% NSFAS payment of NC(V) and 2 nd trimester Report 191 claims	Principal/CFO/Finance Manager	30 June 2017	

3RD QUARTER ACTIVITIES (JULY – SEPTEMBER 2017)			
100% of successful NC(V) and 2 nd trimester Report 191 applicants issued with statements reflecting credited accounts	Finance Manager	14 July 2017	
100% submission of 2 nd semester Report 191 applications	Students	21 July 2017	
Determination on 100% 2 nd semester Report 191 applications	Financial Aid Committee	24 July 2017	
100% of successful and unsuccessful 2 nd semester Report 191 applicants informed of the outcome of their applications	NSFAS/College	28 July 2017	
Signing/accepting of SoPs by 100% of successful 2 nd semester students	Students	4 August 2017	
A list of successful applicants who have not accepted the SoP online within 5 working days must be sent to the College for its intervention	NSFAS	7 August 2017	
Receipt of 100% NSFAS payment of NC(V) and 2 nd trimester Report 191 claims	Principal/CFO/Finance Manager	25 August 2017	
100% submission of 3 rd trimester Report 191 applications	Students	1 September 2017	
Determination on 100% 3 rd trimester Report 191 applications	NSFAS	4 September 2017	
100% of successful and unsuccessful 3 rd trimester Report 191 bursary applicants informed of the outcome of their applications	NSFAS	8 September 2017	
100% of successful 2 nd semester Report 191 applicants issued with statements reflecting credited accounts	Finance Manager	8 September 2017	
Signing/accepting of SoPs by 100% of successful 3 rd trimester students	Students	15 September 2017	
A list of successful applicants who have not accepted the SoP online within 5 working days must be sent to the College for its intervention	NSFAS	18 September 2017	
Receipt of 100% NSFAS payment of 3 rd trimester Report 191 claims	Principal/CFO/Finance Manager	29 September 2017	

4TH QUARTER ACTIVITIES (OCTOBER – DECEMBER 2017)			
100% of successful 3 rd trimester Report 191 applicants issued with statements reflecting credited accounts	Finance Manager	14 October 2017	