



higher education
& training

Department:
Higher Education and Training
REPUBLIC OF SOUTH AFRICA

**GUIDELINES FOR THE ADMINISTRATION AND MANAGEMENT OF THE
DEPARTMENT OF HIGHER EDUCATION AND TRAINING (DHET) FURTHER
EDUCATION AND TRAINING (FET) COLLEGE BURSARY SCHEME**

***“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

- a) DHET: Department of Higher Education and Training
- b) FAC: Financial Aid Committee
- c) FAL: First Additional Language
- d) FAO: Financial Aid Officer
- e) FET: Further Education and Training
- f) FTE: Full time equivalent
- g) ID: South African Identity Document
- h) NC(V): National Certificate (Vocational)
- i) NQF: National Qualifications Framework
- j) NSC: National Senior Certificate
- k) NSDS III: National Skills Development Strategy III
- l) NSFAS: National Student Financial Aid Scheme
- m) NSF-FET Colleges: National Norms and Standards for Funding Further Education and Training Colleges
- n) PDE: Provincial Departments of Education
- o) Report 191: National Education Policy, formal Technical Colleges Instructional Programmes in the RSA
- p) SoP: Schedule of Particulars
- q) SRC: Student Representative Council
- r) SSS: Student Support Services
- s) Umalusi: Council for Quality Assurance in General and Further Education and Training

PURPOSE

The purpose of this document is to provide Colleges with the guidelines for the administration, management and awarding of bursaries to FET College students.

POLICY AND LEGAL CONTEXT

These guidelines have been developed in accordance with the “*National Norms and Standards for Funding Further Education and Training Colleges (NSF-FET Colleges)*”. In terms of the FET Colleges Act, 2006, the Minister of Higher Education and Training must determine policy on the norms and standards for funding FET Colleges. To this effect, in 2009, the Minister promulgated the *National Norms and Standards for funding FET Colleges*, hereafter referred to as the “*NSF-FET Colleges*”.

1. In terms of the NSF-FET 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-FET 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 introduce an FET College bursary scheme. This is to ensure that academically deserving and yet financially needy students gain access to education and training opportunities in FET Colleges. The bursary amount covers the 20% portion of student fees which the academically deserving and financially needy students need not pay.
3. Paragraph 73 of the *NSF-FET Colleges* and paragraph 5.2.4 of the *National Plan for Further Education and Training Colleges in South Africa, 2008* further requires the Department to

develop guidelines for the administration and management of the FET 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 FET College Bursary Scheme, these guidelines must be read in conjunction with:
 - a) *National Student Financial Aid Scheme Act, 1999;*
 - b) *Further Education and Training Colleges Act, 2006;*
 - c) *The National Plan for Further Education and Training Colleges in South Africa, 2008;*
 - d) *National Norms and Standards for Further Education and Training Colleges, 2009;*
 - e) *The extension of phasing out of the National N Certificates: N1 – N3 (Engineering Studies), Government Gazette No. 33793;*
 - f) *The extension of the offering of National N Certificates: N4 – N6, Government Gazette No. 33794; and*
 - g) *Approval of the policy document Formal FET Colleges programmes at Levels 2 to 4 of the NQF, Government Gazette No. 33795.*

These guidelines should be read in conjunction with and with due consideration of the NSFAS Guidelines

5. Pursuant to the commitment made in the policy and legislation cited above, in 2007, for the first time in the history of FET Colleges, a bursary scheme was introduced as a means to create access to priority vocational programmes offered at FET Colleges.
6. In December 2010, the Minister of Higher Education and Training, Dr Blade Nzimande, approved policies which extended the provision of the Report 191 programmes (refer to paragraph 4(e) to 4(g) for the policies).
7. Reference made in the *National Norms and Standards for Further Education and Training Colleges, 2009* and *The National Plan for Further Education and Training Colleges in South Africa, 2008* to State funded programmes therefore includes Report 191 programmes,

and the provision of the FET College Bursary Scheme to Report 191 students came into effect from January 2011.

8. The provision of student financial aid is critical for enabling access to FET Colleges. The role of FET Colleges as the nucleus of skills development in South Africa is explicitly contained in the NSDS III unveiled in January 2011 by Minister Nzimande. The challenge of access for academically deserving students from poor backgrounds is addressed by the bursary scheme.
9. The permissible bursary awards are updated annually. Refer to paragraph 13 and the programme costs of the current 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

10. The Department allocates bursary funds to Colleges on an annual basis taking the following into consideration:
 - a) Programme costs in accordance with the NSF-FET Colleges;
 - b) DHET approved actual National Certificate (Vocational) NC(V) and Report 191 enrolments;
 - c) NC(V) and Report 191 programmes students' academic performance and retention rates;
 - d) College fees; and
 - e) Available funding.
11. Accurate and fair distribution of the bursary funds is of paramount importance. These principles are applied to the enrolment figures finalized by the end of February of each year.

CRITERIA FOR AWARDING OF BURSARIES TO STUDENTS

12. Colleges are required to use the criteria below when awarding bursaries to students:
- a) Students must be enrolled or intending to enroll for the NC(V) **OR** Report 191 programmes for the bursary to be awarded;
 - b) The financial need of the student must be assessed using the NSFAS Means Test tool of each academic year when awarding bursaries to students. **The administration of the Means Test is compulsory and evidence of such administration must be retained at the College for audit purposes;**
 - c) The bursaries should be awarded against an approved and signed agreement between NSFAS and the student – this agreement 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 the SoP;**
 - d) For new NC(V) Level 2 and Report 191 (N1 and N4) students, academic criteria must be applied using the school report from the preceding year and the selection and placement tool results. ***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.*** The minimum standard must be determined by the Financial Aid Committee and approved by the College Principal.
 - e) Applicants who were awarded bursaries for NC(V) Levels 2 and 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 and Level 4 in the current year. Similarly 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. **In respect of prioritizing eligible students for the awarding of bursaries, Colleges must take into account their policy on student progression;**

- f) The granting of a bursary in the current academic year (for students who were granted bursaries in the previous academic year) is subject to the student's financial situation not having improved. The student will have to provide evidence thereof and complete all required forms;
- g) NC(V) Level 2, Level 3 and Level 4 students who were awarded bursaries in the previous academic year and who did not progress to NC(V) Level 3 and Level 4 respectively, cannot be awarded bursaries to repeat NC(V) Level 2, or Level 3;
- h) 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. This provision is only applicable to continuous study. No bursaries should be awarded in the fifth year of study;
- i) On application, Report 191 programme students may apply for all semester or trimester courses in the calendar year of study. Bursaries for the next level of study will only be granted on successful completion of at least 3 subjects in each study level of the Report 191 programmes;
- j) Report 191 students may also be awarded bursaries if they have successfully completed N3 and N6 and have outstanding subjects for full certification. This provision is made for a period of six months for Engineering, Non-Engineering and Business Studies respectively and is applicable to continuous study which will be paid at pro-rata, i.e. proportional to 6 months;
- k) Where bursaries are awarded for outstanding subjects only, the costs per subject should be calculated as follows:

- NC(V) cost per subject: Programme cost (20% which is the student College fee) divided by 7. Refer to paragraph 13 and the programme costs of the current academic year.
 - Report 191 cost per subject: Programme cost (20% which is the student College fee) divided by 4. Refer to paragraph 13 and the programme costs of the current academic year.
- l) With effect from 2013 bursary recipients who switch from one programme to another (i.e. from NC(V) to Report 191 programme N1 – N3 or vice-versa) 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 Report 191 programme N1 – N3; similarly bursary recipients who complete Report 191 N6 are not eligible for financial assistance should they want to enroll for a NC(V) programme;**
- m) Umalusi recognizes credit transfer between the National Senior Certificate (NSC) and the NC(V) in the following subjects:**
- **English Home Language or First Additional Language (passed at 40% and above)**
 - **Mathematics (passed at 30% and above)**
 - **Mathematical Literacy (passed at 30% and above)**
 - **Physical Science (passed at 50% and above)**
- The formula in (k) above should also be used to determine the bursary award for NC(V) students with credit transfer from one or more NSC subjects.; and**
- n) 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 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 that course of action. Colleges must return unutilised funds to NSFAS for redistribution.**

13. The Table below indicates items that may be claimed from the bursary. All costs listed in the Table below are **MAXIMUM** costs that may be awarded to students. The awarding of the items will be agreed on with the College, based on the recommended award amount as per the NSFAS Means Test (unless otherwise recommended by the Financial Aid Committee and approved by the College principal). All costs are per annum.

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	R6 318	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.
Accommodation	R16 848	

Note: College accommodation is inclusive of meals.

14. All the above amounts are **MAXIMUM** amounts that may be awarded. The Financial Aid Committee may recommend alternate amounts without compromising on the quality of access and provision of comprehensive bursaries in some instances. However, such amounts should not exceed the maximum amounts and should not be so low that the promotion of access is compromised.

Travel and Accommodation Allowance

15. 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. 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 R6,318 earmarked as the absolute maximum that a College can award for travel per student.

16. The amounts awarded for accommodation for students in private accommodation may vary from one student to another. **Students may only consider private accommodation if College residence is already filled to capacity or in instances where the FET College does not have residential facilities for students.** In making a final determination on the award for accommodation allowance, the Financial Aid Committee must consider, inter alia, the actual accommodation costs and an affidavit secured by the landlord from the office of the South African Police Service (these supporting documents must be obtained from the landlord). 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 R16,848 earmarked as the absolute maximum that a College can award for accommodation.

17. The award for travel and accommodation is intended to address the low retention rates in the College sector, thereby promoting student access. In order to promote student attendance, it is advisable that student allowance for travel and accommodation be issued in tranches rather than as a lump sum at the start of the academic year. The College attendance of students must be taken into account when determining whether or not to continue making payments for the transport and accommodation allowance tranches. Therefore, the release of student allowance for travel and accommodation must be **dependent on the attendance of students** at the College. **The first tranche should be paid to eligible students in advance and, based on student compliance with the student attendance policy of each College as determined by the College Council, the subsequent tranche should then be paid.**

18. The DHET strongly recommends that Colleges consider sourcing a reliable transport service to transport those students who meet the eligibility criteria for the transport allowance. The relevant procurement processes should be followed when considering the suggested option.

Exemption from paying registration fees

19. Students who meet all the bursary conditions, satisfy the eligibility criteria, qualify for the bursary, and cannot afford to pay a registration fee; should be exempted from paying registration fees. **Colleges may not exclude students on the basis of an inability to pay registration fees.** The advance payment (30% of each College's bursary allocation) is specifically for the purpose of exempting qualifying and deserving students from paying a registration fee.

BURSARY ADMINISTRATION PROCESS

20. The Department requested the NSFAS to administer and manage the Department of Higher Education and Training FET College Bursary Scheme. NSFAS has adapted the Means Test tool for the FET College sector environment.
21. A student must complete the bursary application form and submit all supporting documents (cf. par. 43) (certified copy of pay slips; ID documents, affidavits, etc.). Bursary application forms have been designed by NSFAS for consistency with the Means Test. Colleges should only use these customised forms. The bursary application forms must NOT be submitted to NSFAS with the Schedule of Particulars but should be kept in a secure, safe office at the College. It is against this bursary application form that the auditors will be reviewing the bursary awards to students.
22. There are separate bursary application forms and SoPs for students studying NC(V) and Report 191 programmes. Students must complete either NC(V) or Report 191 bursary application forms.
23. All bursary application forms must be thoroughly checked by the College officials prior to being accepted from the student (cf. par. 43). **The College MUST 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.**

24. The College must issue the student with a receipt to acknowledge that the student has submitted the bursary application form with the necessary supporting documents. In respect of an unemployed parent, it is the parent and not the student, who must submit an affidavit.
25. If there are no certified supporting documents, an affidavit must be submitted by the student. Such affidavits are documents written or validated by the office of the South African Police Service. However, affidavits should be the last resort in terms of supporting documents, and should only be submitted if other supporting documents are not available.
26. The College must load the student information onto the electronic Means Test system within **48 hours** of receiving the application. Whilst student information may be loaded on different computer points, it is important that a consolidation of College information for reporting purposes take place.
27. A covering letter on a College letterhead detailing the amount allocated to the College for the relevant academic year, the amount being claimed in that batch, the balance, a detailed control list (this control list should also be e-mailed to NSFAS), the full set of student Schedule of Particulars and certified Identity Documents batched in alphabetical order (as per the control list) must be submitted to NSFAS.
28. 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 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
Certification rates report of NC(V) and Report 191 bursary recipients of the previous academic year	Colleges	28 February of each year
Final bursary allocations released for each academic year	DHET	31 March of each year
50% of NC(V) bursary allocation claimed from NSFAS	Colleges	30 April of each year
100% of NC(V) bursary allocation claimed from NSFAS	Colleges	30 June of each year
50% of Report 191 bursary allocation claimed from NSFAS	Colleges	30 June of each year
Submission of Means Test data to NSFAS of the previous year	Colleges	31 July of each year
Issuing of programme costs, bursary applications forms and Schedule of Particulars 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 Report 191 bursary allocation claimed from NSFAS	Colleges	30 September of each year
Colleges must submit to DHET Means Test data of all applicants, (successful and unsuccessful) using the DHET template provided.	Colleges	30 September of each year
Bursary Administration and Management workshops for the following year	DHET and PDE	September/October of each year
Provisional bursary allocations released for the following year	DHET	30 November of each year

29. A claim is regarded as successful when NSFAS has accepted and paid to the College the claimed amount. Colleges must take note of the 30 days NSFAS turnaround time for processing of claims.
- 30. The Financial Aid Committee (FAC) must convene, at a minimum, one meeting per month to review and make recommendations on applications received. Detailed minutes of the FAC meetings must be kept.**
31. The Financial Aid Committee should be a stakeholder-inclusive committee that includes representation from:
- Student Support Services;
 - Finance;
 - Administration;
 - Student Representative Council;

- e) Marketing; and
- f) Management.

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 DHET before the end of January of each year (the letter must be signed by the College Principal).

- 32. The Financial Aid Committee must keep a 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.
- 33. The Financial Aid Committee must forward recommendations to the Principal for approval. **The total claim submitted by Colleges to NSFAS must not exceed the College's final bursary allocation.**
- 34. 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.
- 35. Lists of names of successful and unsuccessful bursary applicants must be sent to the College Financial Aid Office for student notification. All successful students should be notified in writing of the outcome of their bursary application within two weeks of the College having received bursary funds from NSFAS.
- 36. The Financial Aid Officer should inform both successful and unsuccessful applicants in writing of the outcome of their applications, and these letters must be signed by the College Principal **or as indicated in Paragraph 34**. A record of the letter must be filed.

37. Colleges are required to keep an Appeals Register of students who have contested the decisions made on their bursary applications.
38. Colleges should set up a Bursary Appeals Committee which should be constituted as follows:
- Representation of the College Council;
 - College Principal;
 - Vice Principal: Academic;
 - Chief Financial Officer;
 - SSS Manager (Financial Aid Officer); and
 - 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.

39. The Schedule of Particulars (SoP) is an acknowledgement of the acceptance of a bursary by the student. Therefore, only successful students MUST sign SoPs once their bursary application has been approved, as this is the only document that the College is expected to submit to NSFAS in support of its claim. The SoP should be accompanied by a certified copy of the student Identity Document (the stamp of certification must be on the same page as the image of the ID document). Colleges must keep copies of the SoP which will be required by the auditors during the audit.

ADDITIONAL COLLEGE RESPONSIBILITIES

40. Colleges must take responsibility for and take note of the following:
- a) Informing students of all important documents to be submitted with their bursary applications;
 - b) Developing a document checklist (cf. par. 43) to ensure that all relevant documents are received;

- c) **Application forms with incomplete documents should not be accepted. If there are queries on submitted documents, the student must be notified immediately;**
- d) Furnishing students with proof of submission of application forms and supporting documents;
- e) Bursary agreements (Schedule of Particulars) should be signed by the student and the College;
- f) Students should be made aware of their rights, roles and responsibilities, e.g. notification of other bursaries or change of address etc.

CHECKLIST FOR FET COLLEGES - BURSARY ADMINISTRATION

Inviting applications

41. The following should be the main considerations when students are invited to apply for the bursary:
 - a) Students should not be guaranteed bursaries;
 - b) Applications for the following year should be open from 1 September of the current year;
 - c) 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);
 - d) Closing dates should be communicated to students timeously; and
 - e) Colleges have to communicate the bursary process in classes, through internal and external newsletters and posters and other means the College may deem appropriate.

Eligibility criteria for bursary application

42. In applying for the FET College bursary, a student must meet the following eligibility criteria:
 - a) Only South African Citizens are eligible for this bursary scheme;
 - b) A student must be registered or intending to register on an NC(V) or Report 191 programme;

- c) Financially needy students with academic potential; and
- d) Evidence of good academic performance should be provided for all Levels.

Minimum required information

43. To be deemed acceptable for processing, a student's bursary application form must have the following :
- a) NC(V) or Report 191 programme and Level registered for;
 - b) Personal details (including contact numbers, email addresses, etc.);
 - c) Certified Copy of Identity Document;
 - d) Applicant's current home address;
 - e) Address while studying;
 - f) Postal Address;
 - g) Salary and other income information of the parent/guardian on whom the student is dependent (pensioners should submit an affidavit as proof);
 - h) Details of next of kin (ID numbers, first names and surname, contact details and relationship to student);
 - i) Details of parent(s) and / or guardian(s) (ID numbers, first names and surname and contact details);
 - j) Residential address/addresses of parent(s) and / or guardian(s);
 - k) Sworn affidavits from parents/guardians if they are unemployed;
 - l) Certified death certificates if parents/guardians are deceased;
 - m) Number of family members in the household (include their certified ID copies); and
 - n) Age and educational status (complete primary, incomplete secondary –Grade level for those still in school, complete secondary, diploma/certificate/degree) of members in the household.

MONITORING AND SUPPORT

44. The Department and its regional office will conduct regular monitoring and support of the DHET FET College Bursary Scheme administration at Colleges. Colleges are encouraged to contact the Province/regional office, the DHET and NSFAS when support is needed.

MARKETING

45. It is the responsibility of the College to develop a marketing strategy for the bursary and to market the bursaries to the students. It is critical that the bursaries are marketed as the Department of Higher Education and Training (DHET) FET Colleges Bursary Scheme (DHET FET 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.
46. 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.
47. 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.