



higher education  
& training

Department:  
Higher Education and Training  
REPUBLIC OF SOUTH AFRICA

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**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 2016**

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*“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)*

## TABLE OF CONTENTS

1.	<i>Purpose</i> .....	4
2.	<i>Policy and Legal Context</i> .....	4
3.	<i>Bursary Funds Allocation Criteria to Colleges</i> .....	6
4.	<i>Student Eligibility Criteria for the DHET TVET College Bursary</i> .....	7
5.	<i>Minimum Required Documentation</i> .....	7
6.	<i>Criteria for Awarding Bursaries to Students</i> .....	8
7.	<i>Travel and Accommodation Allowances</i> .....	13
8.	<i>Verification of residential addresses of recipients of allowances</i> .....	16
9.	<i>Exemption from Paying Registration Fees</i> .....	16
10.	<i>Bursary Administration Process</i> .....	17
11.	<i>Bursary Administration Schedule</i> .....	19
12.	<i>Additional NSFAS and College Responsibilities</i> .....	22
13.	<i>Monitoring and Support</i> .....	23
14.	<i>Marketing</i> .....	23

## TEMPLATES

A	<i>Checklist for bursary applications</i> .....	25
B	<i>Letter to successful applicants</i> .....	26
C	<i>Letter to unsuccessful applicants</i> .....	28
D	<i>Bursary Administration annual work plan</i> .....	30

## 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 Technical and Vocational Education and Training (TVET) colleges with the rules and guidelines for the administration, management, and awarding of bursaries to 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 introduce the FET College Bursary Scheme. 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 *DHET TVET College Student Attendance and Punctuality Policy, 2013;*
  - 4.9 *NSFAS Guidelines and Regulations; and*
  - 4.10 *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. In December 2010, the Minister of Higher Education and Training, Dr BE Nzimande, approved policies which extended the provision of the Report 191 programmes (refer to paragraph 4.5 to 4.7 for the policies).
7. Reference is made in the *National Norms and Standards for Technical and Vocational Education and Training Colleges, 2009* and *The National Plan for Technical and Vocational Education and Training Colleges in South Africa, 2008* with regard to state-funded programmes and therefore

includes Report 191 programmes. Thus the provision of the TVET 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 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.
9. The permissible bursary awards are updated annually. Refer to paragraph 16 below for amounts for travel and accommodation as well as the programme costs of the 2016 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:
  - 10.1 Programme costs in accordance with the NSF-TVET Colleges;
  - 10.2 DHET approved actual National Certificate (Vocational) (NC(V)) and Report 191 enrolments;
  - 10.3 Students' academic performance and retention rates in NC(V) and Report 191 programmes;
  - 10.4 College fees; and
  - 10.5 Available funding.
11. 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:

- 11.1 The first component is the government subsidy which covers 80% of the programme costs;
  - 11.2 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
  - 11.3 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.**
12. Taking into account the components of the funding formula, the National Student Financial Aid Scheme (NSFAS) and non-pilot colleges<sup>1</sup> must first and foremost prioritise the awarding of college fees to qualifying students. Colleges may consider applications for travel and accommodation allowances subject to the availability of funds.

### **STUDENT ELIGIBILITY CRITERIA FOR THE DHET TVET COLLEGE BURSARY SCHEME**

13. In applying for a DHET TVET college bursary, a student must meet the following eligibility criteria:
- 13.1 Only South African citizens are eligible for this bursary scheme;
  - 13.2 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;
  - 13.3 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
  - 13.4 An ability to demonstrate potential for academic success / or proven academic performance (academically deserving).

### **MINIMUM REQUIRED DOCUMENTATION**

14. To be deemed acceptable for processing, it is compulsory that a student's bursary application form must have the following supporting documents:
- 14.1 Registration documents (statement of results or academic record and a printed proof of registration);

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<sup>1</sup> Pilot colleges refers to colleges participating in the NSFAS centralised bursary management pilot system. Pilot college students apply for NSFAS bursaries directly with NSFAS. In respect of non-pilot colleges, students apply for NSFAS bursaries at their respective colleges.

- 14.2 Identity Documents (certified copy of the student's Identity Document or certified copy of the birth certificate if NOT older than 18 years; 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);
- 14.3 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;
- 14.4 Student marital status documents (attach a certified copy of the marriage certificate, a certified copy of the divorce decree letter or a certified copy of the death certificate if divorced or widowed); and
- 14.5 Travel and Accommodation documents (if applicable) attached as affidavits and/or copies of rental agreements.

## **CRITERIA FOR AWARDING BURSARIES TO STUDENTS**

- 15. NSFAS and non-pilot colleges are required to use the criteria below when awarding bursaries to students:
  - 15.1 In making a determination on the bursary applications, NSFAS and the non-pilot college Financial Aid Committee (FAC) must consider the bursary application together with the supporting documents (refer to Template A) and the results of the Means Test;
  - 15.2 The financial need of the student must be assessed using the NSFAS Means Test tool of each academic year 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 and at the non-pilot college for audit purposes (non-pilot colleges must attach a copy of the Means Test results to each bursary application);

- 15.3 The academic merit of the student must be assessed 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;
- 15.4 Both the criteria for financial need and the academic merit must be applied. Students should be categorised and prioritised in terms of their eligibility weightings. Students who have the greatest financial need (EFC rating A)<sup>2</sup> and the highest academic rating (academic rating 1)<sup>3</sup> must be in the top category and they must be given first priority accordingly;
- 15.5 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;
- 15.6 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. The SoP without an agreed amount between NSFAS and the student should be regarded as an invalid contract;
- 15.7 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, N3 statement of results

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<sup>2</sup> Expected Family Contribution (EFC) ratings range from A (greatest financial need) to F (lowest financial need)

<sup>3</sup> Academic ratings range from 1 (highest academic rating) to 7 (lowest academic rating)

and the selection and placement tool<sup>4</sup> results. NSFAS and the non-pilot 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 and non-pilot colleges 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 and non-pilot colleges 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;

- 15.8 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;
- 15.9 **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 must therefore ensure that students who are registered for NC(V) Level 2 in 2016 are aware of this requirement;**
- 15.10 On application, Report 191 programme students apply for all semester or trimester courses in the calendar year of study. 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;**

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<sup>4</sup> The selection and placement tool refers to a test used which is administered to identify cognitive gaps in numeracy and literacy for first-time college applicants/students

- 15.11 In respect of non-pilot colleges, 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 (all income-related supporting documents) and complete all required forms;
- 15.12 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;
- 15.13 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;
- 15.14 Where bursaries are awarded for outstanding subjects only, the costs per subject should be calculated as follows:
- 15.14.1 NC(V) cost per subject: Programme cost (20% which is the student college fee) is divided by 7. Refer to paragraph 16 below and the programme costs of the current academic year; and
- 15.14.2 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 16 below and the programme costs of the current academic year;
- 15.15 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);

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

15.16.1 English Home Language or First Additional Language (passed at 40% and above);

15.16.2 Mathematics (passed at 30% and above);

15.16.3 Mathematical Literacy (passed at 30% and above); and

15.16.4 Physical Science (passed at 50% and above).

The formula in (15.14) above should also be used to determine the bursary award for NC(V) students with credit transfer from one or more NSC subjects; and

15.17 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 that course of action. Colleges must return unutilised funds to NSFAS for redistribution.

16. 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 2016. The awarding of the items will be based on the recommended award amount as per the NSFAS Means Test (unless otherwise recommended by the non-pilot college Financial Aid Committee and

approved by the Principal) and subject to the availability of funds. All costs are per annum for the 2016 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	<b>R7 405</b>	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 pilot college students via SBUX <sup>5</sup> . Travel allowances will be paid directly to the college where applicable.
Accommodation	<b>R19 746</b>	

*Note: College accommodation is inclusive of meals.*

All the above amounts are **MAXIMUM** amounts that may be awarded for 2016 and must not be exceeded.

#### **TRAVEL AND ACCOMMODATION ALLOWANCES**

17. 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

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<sup>5</sup> SBUX refers to an electronic cellphone system through which payment of allowances can be made to students

R7 405 earmarked as the absolute maximum that a college can award for travel per student per annum.

18. 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, NSFAS and the non-pilot college Financial Aid Committee must consider, inter alia, the actual accommodation costs and a rental agreement. **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 R19 746 earmarked as the absolute maximum that a college can award for accommodation per student per annum.
19. 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.
20. 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. 19) 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.

21. The Financial Aid Committee must consider, over and above the requirements outlined in paragraphs 17 and 18 for the awarding of travel and accommodation allowances, the categorisation and prioritisation of students in terms of their eligibility weightings (cf. par. 15.4). Furthermore, students who are awarded travel allowance must not be considered for an accommodation allowance and vice-versa.
22. NSFAS and non-pilot colleges must pay travel and accommodation allowances directly to students 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.
23. NSFAS and non-pilot colleges 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 pilot and non-pilot 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.
24. 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**

25. 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.
26. 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.

#### **EXEMPTION FROM PAYING REGISTRATION FEES**

27. 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**

28. The NSFAS manages and administers the Department of Higher Education and Training TVET College Bursary Scheme on behalf of the Department. NSFAS has adapted the Means Test tool for the TVET college sector.
29. A student must electronically or manually complete the bursary application form and submit all supporting documents (cf. par. 14) (certified copy of pay slips; ID documents, affidavits, etc.). Bursary application forms have been designed by NSFAS for consistency with the Means Test. Students should only use these customised forms. Non-pilot colleges must NOT submit the bursary application forms to NSFAS with the Schedule of Particulars (SoP) but should keep these forms in a secure, safe office at the college. It is against these bursary application forms that the auditors will be reviewing the bursary awards to students.
30. In respect of non-pilot colleges, 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. First-time pilot college bursary applicants must apply directly with NSFAS and they must follow the instructions when completing an online bursary application form at [www.nsfas.org.za/STUDENTS/APPLY](http://www.nsfas.org.za/STUDENTS/APPLY). NSFAS has direct access to results of applicants who wrote Grade 12 examinations from 2013 onwards and those who were previously studying at a TVET college.
31. Returning NSFAS bursary beneficiaries from pilot colleges 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.
32. All bursary application forms must be thoroughly checked by NSFAS and the college officials prior to being accepted from the student (cf. par. 14 and Template A which the non-pilot colleges may modify). NSFAS and the non-pilot colleges 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.

33. NSFAS and the non-pilot colleges must acknowledge receipt of the bursary application form with the necessary supporting documents. Non-pilot colleges must either develop a template or use a receipt book for acknowledging receipt of bursary applications.
34. NSFAS must submit a list of complete online applications to the pilot colleges every two weeks. The turnaround time for making a determination on a complete online bursary application is ten (10) working days. Once NSFAS has made a determination on a complete bursary application it must communicate the outcome to both successful and unsuccessful applicants in writing. 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 the pilot colleges every two weeks.
35. Successful applicants must register online with NSFAS and upon registration the SoP will be generated and students must sign the 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 pilot college for its intervention.
36. 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.
37. Non-pilot colleges 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 takes place.
38. A covering letter on a non-pilot 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.

39. 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 and the DHET	Principals	Monthly
Certification rates report of NC(V) and Report 191 bursary recipients of the previous academic year	Colleges	15 February of each year
Final bursary allocations released for each academic year	DHET	31 March of each year
50% of the total bursary allocation claimed from NSFAS	Colleges	30 April of each year
75% of the total bursary allocation claimed from NSFAS	Colleges	30 June of each year
Submission of Means Test data to NSFAS of the previous year	Non-pilot Colleges	31 July of each year
Issuing of programme costs, bursary applications forms and Schedule of Particulars to colleges for the following year	DHET & NSFAS	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 from NSFAS	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

40. A claim is regarded as successful when NSFAS has accepted and paid to the college the claimed amount. Non-pilot colleges must take note of the 30 days NSFAS turnaround time for processing of claims.

41. 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:

- 41.1 Enforces strict compliance to the Bursary Rules and Guidelines;
  - 41.2 Promotes honest and transparent bursary administration processes;
  - 41.3 Adjudicates on the awarding of bursaries to students (non-pilot colleges only); and
  - 41.4 Oversees utilisation of the college bursary allocation.
42. The above-mentioned functions of the Financial Aid Committee will evolve as part of the transition stage to the new NSFAS centralised bursary management system. The Financial Aid Committee (FAC) must have, at a minimum, one meeting per month to take stock of bursary administration processes. Over and above that, a non-pilot college FAC must also review and make recommendations on applications received. Detailed minutes of the FAC meetings must be kept.
43. The Financial Aid Committee should be a stakeholder-inclusive structure that includes representation from:
- 43.1 Student Support Services;
  - 43.2 Finance;
  - 43.3 Corporate Services;
  - 43.4 Student Representative Council;
  - 43.5 Marketing; and
  - 43.6 Management.
44. 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 to the Department before the end of January of each year (the non-pilot colleges must also include the names and contact details of all members of the Bursary Appeals Committee - the letter must be signed by the college Principal).
45. 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.

46. The non-pilot college Financial Aid Committee must forward recommendations to the Principal for approval. The total claim submitted by non-pilot colleges to NSFAS must not exceed the college's final bursary allocation.
47. 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.
48. Lists of names of successful and unsuccessful bursary applicants must be sent to the non-pilot college Financial Aid Office for student notification. The non-pilot college Financial Aid Officer must communicate the outcomes of the applications for bursaries to both successful (cf. Template B which the non-pilot college may modify) and unsuccessful (cf. Template C which the non-pilot college may modify) applicants in writing once the Principal has approved the recommendations of the non-pilot college Financial Aid Committee. The letters updating the applicants must be signed by the non-pilot college Principal or as indicated in paragraph 42. A record of the letter must be filed.
49. 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 non-pilot college Financial Aid Committee must lodge an appeal in writing with NSFAS or the non-pilot college Bursary Appeals Committee within ten (10) working days of having received the outcome of his/her bursary application.
50. NSFAS and the non-pilot college Financial Aid Committee must formulate and provide a template which unsuccessful applicants must use to lodge an appeal. NSFAS and non-pilot colleges are required to keep an Appeals Register of students who have contested the decisions made on their bursary applications.

51. Non-pilot colleges should set up a Bursary Appeals Committee which should be constituted as follows:

51.1 College Principal;

51.2 Vice Principal: Academic;

51.3 Chief Financial Officer;

51.4 SSS Manager (Financial Aid Officer); and

51.5 President of the SRC (or the Deputy President of the SRC if the appeal is lodged by the President).

The non-pilot college principal may use his/her discretion to add other representatives to the Bursary Appeals Committee.

52. 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 document that the students are expected to submit to NSFAS in support of its claim (non-pilot colleges submit the SoPs on behalf of their students). The SoP should be accompanied by a certified copy of the student Identity Document (in respect of non-pilot colleges the stamp of certification must be on the same page as the image of the ID document). NSFAS and non-pilot colleges must keep copies of the SoP which will be required by the auditors during the audit.

### **ADDITIONAL NSFAS AND COLLEGE RESPONSIBILITIES**

53. 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 Non-pilot colleges: Developing a document checklist (cf. Template A which the college may modify) 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 by the student and the college in respect of non-pilot colleges; 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**

- 54. The Department and its regional offices 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.

## **MARKETING**

- 55. 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.
- 56. 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 Colleges 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.
- 57. 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.
- 58. 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.

59. 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

Please indicate Yes (if submitted), No (if not submitted) or N/A (if not applicable) in the Table below:

Supporting Documents		Yes, No or N/A
1.	Bursary Application form completed in full	
2.	Certified copies of the student's Identity Document	
3.	Proof of marital status if married, divorced or widowed (if applicable)	
4.	Certified copies of Identity documents of <b>both</b> Parents/Guardians	
5.	Certified copies of Identity Documents of family members in a household	
6.	Certified copies of <b>both</b> Parents/Guardians/spouse salary advice slips not older than three months from date of application (if applicable)	
7.	Certified copies of <b>both</b> Parents/Guardian's pension payments not older than three months from date of application (if applicable)	
8.	If a parent/guardian is unemployed – she/he must make an affidavit at the Commissioner of oaths (if applicable)	
9.	If Parents/Guardians are Deceased - supply certified copy of Death Certificate (if applicable)	
10.	New students supply Grade9/10/11/12 statement of results); Existing students supply academic history	
11.	Transport Allowance (if applicable provide supporting documents)	
12.	Accommodation Allowance (if applicable provide supporting documents)	
13.	Proof of registration reflecting the number of registered subjects	

## 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)/non-pilot college Financial Aid Committee 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
<b>Total:</b>	<b>R 0.00</b>

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)/non-pilot college Financial Aid Committee (FAC) 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 DHET TVET College Bursary Scheme Rules and Guidelines you are at liberty to lodge an appeal against the decision of the FAC should you have reason to believe that the FAC 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 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: 2016 ANNUAL WORK PLAN**

<b>1<sup>ST</sup> QUARTER ACTIVITIES (JANUARY – MARCH 2016)</b>			
Activity	Responsibility	Completion Date	Status (Done/Not Done/In progress)
50% student submission of NC(V) & 1 <sup>st</sup> trimester/semester Report 191 applications	Students	15 January 2016	
Capturing of 50% of NC(V) & 1 <sup>st</sup> trimester/semester Report 191 bursary data into the Means Test completed	Data Capturers	29 January 2016	
Determination on 50% NC(V) & 1 <sup>st</sup> trimester/semester Report 191 bursary applications	Financial Aid Committee	5 February 2016	
Approval and submission of 50% NC(V) & 1 <sup>st</sup> trimester/semester Report 191 claims to NSFAS	Principal	12 February 2016	
50% of successful and unsuccessful NC(V) & 1 <sup>st</sup> trimester/semester Report 191 applicants informed of the outcome of their applications	Principal	12 February 2016	
Closing date for 100% student submission of NC(V) & 1 <sup>st</sup> trimester/semester Report 191 bursary applications	Students	26 February 2016	
Capturing of 100% of NC(V) & 1 <sup>st</sup> trimester/semester Report 191 bursary data into the Means Test completed	Data Capturers	4 March 2016	
Determination on 100% NC(V) & 1 <sup>st</sup> trimester/semester Report 191 bursary applications	Financial Aid Committee	11 March 2016	
Approval and submission of 100% NC(V) & 1 <sup>st</sup> trimester/semester Report 191 bursary claims to NSFAS	Principal	18 March 2016	
100% of successful and unsuccessful NC(V) & 1 <sup>st</sup> trimester/semester Report 191 bursary applicants informed of the outcome of their applications	Principal	18 March 2016	

<b>2<sup>ND</sup> QUARTER ACTIVITIES (APRIL – JUNE 2016)</b>			
Receipt of 50% NSFAS payment of NC(V) & 1 <sup>st</sup> trimester/semester Report 191 bursary claims	Principal/CFO/Finance Manager	1 April 2016	
50% of successful NC(V) & 1 <sup>st</sup> trimester/semester Report 191 applicants issued with statements reflecting credited accounts	Finance Manager	15 April 2016	
Receipt of 100% NSFAS payment of NC(V) & 1 <sup>st</sup> trimester/semester Report 191 claims	Principal/CFO/Finance Manager	22 April 2016	
100% of successful NC(V) & 1 <sup>st</sup> trimester/semester Report 191 applicants issued with statements reflecting credited accounts	Finance Manager	6 May 2016	
100% submission of 2 <sup>nd</sup> trimester Report 191 applications	Students	13 May 2016	
Capturing of 100% of 2 <sup>nd</sup> trimester Report 191 bursary data into the Means Test completed	Data Capturers	20 May 2016	
Determination on 100% 2 <sup>nd</sup> trimester Report 191 applications	Financial Aid Committee	23 May 2016	
Approval and submission of 100% 2 <sup>nd</sup> trimester Report 191 claims to NSFAS	Principal	27 May 2016	
100% of successful and unsuccessful 2 <sup>nd</sup> trimester Report 191 bursary applicants informed of the outcome of their applications	Principal	27 May 2016	

<b>3<sup>RD</sup> QUARTER ACTIVITIES (JULY – SEPTEMBER 2016)</b>			
Receipt of 100% NSFAS payment of 2 <sup>nd</sup> trimester Report 191 claims	Principal/CFO/Finance Manager	2 July 2016	
100% of successful 2 <sup>nd</sup> trimester Report 191 applicants issued with statements reflecting credited accounts	Finance Manager	15 July 2016	
100% submission of 2 <sup>nd</sup> semester Report 191 applications	Students	15 July 2016	
Capturing of 100% of 2 <sup>nd</sup> semester Report 191 bursary data into the Means Test completed	Data Capturers	22 July 2016	
Determination on 100% 2 <sup>nd</sup> semester Report 191 applications	Financial Aid Committee	25 July 2016	
Approval and submission of 100% 2 <sup>nd</sup> semester Report 191 claims to NSFAS	Principal	29 July 2016	

100% of successful and unsuccessful 2 <sup>nd</sup> semester Report 191 applicants informed of the outcome of their applications	Principal	29 July 2016	
100% submission of 3 <sup>rd</sup> trimester Report 191 applications	Students	2 September 2016	
Capturing of 100% of 3 <sup>rd</sup> trimester Report 191 bursary data into the Means Test completed	Data Capturers	5 September 2016	
Determination on 100% 3 <sup>rd</sup> trimester Report 191 applications	Financial Aid Committee	7 September 2016	
Approval and submission of 100% 3 <sup>rd</sup> trimester Report 191 claims to NSFAS	Principal	9 September 2016	
100% of successful and unsuccessful 3 <sup>rd</sup> trimester Report 191 bursary applicants informed of the outcome of their applications	Principal	9 September 2016	
100% of successful 2 <sup>nd</sup> semester Report 191 applicants issued with statements reflecting credited accounts	Finance Manager	16 September 2016	
<b>4<sup>TH</sup> QUARTER ACTIVITIES (OCTOBER – DECEMBER 2016)</b>			
Receipt of 100% NSFAS payment of 3 <sup>rd</sup> trimester Report 191 claims	Principal/CFO/Finance Manager	14 October 2016	
100% of successful 3 <sup>rd</sup> trimester Report 191 applicants issued with statements reflecting credited accounts	Finance Manager	28 October 2016	