



UNIVERSITY *of the*
WESTERN CAPE

UNIVERSITY OF WESTERN CAPE (UWC)

POLICY:
FINANCIAL AID AND WORK-STUDY PROGRAMME POLICY

DATE OF LAST APPROVAL: C2011/04

Amended by Council, 24 November 2011 (C2011/04)
Approval by Council C2007/04
(SDSSC Annex 2007/02/01)



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FINANCIAL AID POLICY AMENDMENT (2010)

OCTOBER 2010

A place of quality,
a place to grow, from hope
to action through knowledge

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DEFINITIONS OF TERMS

UWC: University of the Western Cape

SDSSC: Student Development and Support Services Committee

Scholarship: A scholarship is an award for past meritorious academic performance and achievement at the highest level notwithstanding prior categorical stipulations. Cum Laude students normally qualify for scholarships.

Postgraduate Scholarships: The responsibilities of the Senate Scholarships and Fellowship Committee extend to postgraduate bursary awards where academic merit decisions are required.

Entrant: For the purpose of the Scholarships Budget, an entrant is a student who is registering at a Tertiary Institution for the first time, for the first year of an undergraduate degree or diploma.

Purse: Refers to the monetary value of a scholarship award, usually paid directly into a recipient's fee account.

Without Purse: Scholarships may be awarded without purse (or with a proportion or part of the purse) where a condition of award precludes multiple awards or overlapping awards; in the case of entrant merit awards (EMA) or First Year Merit Awards where a renewed EMA overlaps an undergraduate scholarship the scholarship is awarded without purse and if the renewal is for a lesser amount than the undergraduate scholarship the second award is endorsed as 'part of purse'.

Renewals: A renewable scholarship is one where the scholarship and purse endure over a period specified either in number of years or for the duration of a qualification subject to a merit criterion test at stated intervals.

All renewals specify the minimum performance criteria for continuation of the award.

Conditions of Award and Procedures: All scholarships have attached, *inter alia*, conditions, criteria, terms and limitations for eligibility of award and procedures followed in making awards such as selection, lists of candidates, criteria for renewal, etc. Awards Committees and sub-committees are bound by the rules of conditions and procedures.

Nationality: Only RSA nationals and permanent residents are eligible for UWC entrant or undergraduate scholarships. All students (including international and students) are eligible for the UWC Senior Merit Award.

Bursary: Bursaries are awards given to students in need of financial support who are performing well academically. At UWC, a bursary is an award allocated to students who perform above average, but not at the same high level as meritorious performers. Students with averages above 60% qualify for bursaries. A Bursary does not have to be repaid.

Bursaries and Loans Package: A combination of awards from one or more sources offered to a student by the BLSC to supplement his/her own contribution, and external funding, to the level necessary to meet the approved costs of study.

Nominal Book Allowance: An allowance paid to partially compensate students for purchase of essential prescribed books. Books are only to be purchased from bookshops and/or respective UWC departments.

Restricted Award: An award on which the donor has placed restrictions, limiting it to students with certain attributes.

Satisfactory Academic Progress: Meeting academic progress requirements as determined by sponsors, Senate or by SDSSC.

1. PREAMBLE

The University of the Western, cognisant of Its role in providing access to higher education, continues to offer opportunities to students who are showing potential but have financial difficulties. These are students who are mostly drawn from disadvantaged schools who defy adversity as they lack resources, but are showing will and resilience to succeed.

This policy document governs various forms of funding support to students, and outlines what needs to be achieved. The Institutional Operating Plan (IOP) document gives a framing context and it is important that this document responds directly to the strategic thrust contained in the IOP document. This brings into focus the extent of adaptability to meet the expectations of the university in the next five years and beyond. This Includes the growth plan of the university. The Interventions must address the pertinent realities of shortage of funding whilst acknowledging best performance.

To achieve the objectives of this policy, there is a fundamental need to:

- . Provide different models of funding and create the base of available funding;
- Incentivise good student performance who are drawn from rural areas, in particular, women; and
- Apply the donor or university criteria when allocating funding.

While the policy recognises and rewards outstanding academic achievement, and is committed to promoting equity and access to education for students who have the potential to succeed, but not the financial means.

2. SCOPE OF THE POLICY

This policy document refers largely to bursaries, awards, sports merit awards, undergraduate scholarships, trusts and external bequests administered by the University of the Western Cape. This excludes SRC rebates which fall under the Deputy Vice Chancellor: Student Development. This policy avoids specific reference to National Students Financial Aid Scheme (NSFAS), as this falls under a different policy framework, with a predetermined means test and funding manual. Responsibility for policy areas relating to scholarship awards and fellowship at post-graduate level is vested in the Senate Scholarships and Fellowship Committee (SS&FC), which is a Committee of Senate. Similarly, responsibility for policy relating to bursaries and loans, and the awarding of such funding, is vested in the Financial Aid Subcommittee (also a Committee of Senate). Closer synergy and collaboration between the two committees is seminal to achieving broader strategic goals.

Parameters relating to the nature and extent of awards are excluded from this document. Such parameters are adjusted annually on the recommendation of relevant and responsible Committees and the sponsors of funding. Largely, the Financial Aid Office, in partnership with other role-players, will be driving the implementation of the policy.

3. GOVERNANCE

Student Development and Support Services Committee (SDSSC) is the main committee responsible for recommending Financial Aid subcommittee policy proposals and guidelines before discussion and final approval by the University Council.

The subcommittee is responsible for making recommendations to the Student Development and Support Services Committee (SDSC) in respect of:

- the funding of merit awards to entrants, undergraduates and graduates;
- the funding of bursaries to entrants and undergraduates;
- the funding of Sports Bursaries;
- the conditions governing the granting and management of student merit awards administered by the University; and
- the granting of all student bursaries and awards administered by the University on behalf of external funders.
- Where funds have specific award rules, those rules will take precedence over any policy of UWC. But, the committee needs to be presented with Information to ratify such a decision.

4. RELEVANT SUBCOMMITTEES OF SDSSC

4.1 The Financial Aid Sub-committee

The Head of Financial Aid Office acts as Chairperson, Institutional Planning Office, SRC President or a representative, Executive Director of Finance, or someone designated by him/her, Director of Residential and Catering Services, or someone designated by him/her, Director of Postgraduate Studies, Faculty Representatives and Executive Assistant to the Deputy Vice Chancellor: Student Development and Support.

4.2 Sports Merit Awards Sub-Committee

The Head of Sports Administration serves as Chairperson of the Subcommittee, Sports Council, SRC Representative, Representative from the Academic Department (SRES) and/or Centre for Sports Development.

The subcommittee is expected to make recommendations to the Financial Aid Subcommittee on the funding the sports merit awards. The funding principles must be consistent with the funding criteria as determined by policy. Any deviation needs a formal motivation to serve in the Financial Aid Subcommittee for approval.

Consider merging this subcommittee Into the Financial Aid Subcommittee.

5. CATEGORIES OF FUNDING

Bursaries
Scholarships
Awards Fellowships

6. TUITION FEE INCENTIVE

Recognising academic excellence is one of the hallmarks of this policy. This applies to excellent performance first at Matric and during the course of students' academic lifespan. The criteria require constant review as conditions in higher education change.

The allocation of funding for the tuition fee Incentive needs the ratification of the Committee to ensure the integrity of the process and maintaining transparency. Any deviations to these requirements will be viewed as violation of the policy.

First year Tuition Fee Incentive

The University of the Western Cape offers tuition fee incentives for deserving (financially) Grade 12 learners entering the University for the first time. The awards are applicable to South African citizens who have matriculated in the year prior to registration at UWC. The award only applies to students who have passed matriculation with a full matriculation exemption. Prospective students, who are referred to as Senate Discretionary (SD) do not qualify for the incentive. The tuition fee incentive is not an entitlement and every applicant is expected to apply for the award in the **First Semester only** by completing the prescribed application form for the **First Year Tuition Fee Incentive**. The normal application procedure applies and all applications will be subjected to a means test. The awards are subject to the availability of funding.

Please note that the first year tuition fee incentive applies to the first year of study only.

Award Conditions and Amounts

- Applicants who obtained a level 7 aggregate qualify for a 100% tuition fee rebate.
- Applicants who obtained a level 6 aggregate qualify for a 75% tuition fee rebate.
- The award will be credited into the fee account.
- The subcommittee reserves the authority to review the allocation.
- Applicants who are in receipt of full cost bursaries or in receipt of UWC staff rebates will not qualify for First Year Fee incentive.

6. STAFF REBATE

Students whose parents are working at the University qualify for Staff Rebate do not qualify for first year fee waiver. The staff rebate is calculated as a 100% rebate on dependants of the staff member and 50% for the spouse. This is administered by the provisions/guidelines of UWC's Human Resources Department.

Limitation Clause

If the student qualifies for staff rebate and is in possible receipt of any funding drawn from outside the university, may qualify for the external funding or the amount will be reduced in order that the funding could cater for other qualifying students for purposes of equity and fairness.

8. ELIGIBILITY FOR FUNDING

Applications for funding are only accepted from students who:

- are registering for a degree or a diploma at UWC,
- apply for financial aid in time (late applications will be processed only in special circumstances and subject to the availability of funds).

The following costs can be taken into account in awarding bursaries and loans administered by UWC:

8.1 Tuition Costs

Tuition costs refer to the costs of the approved modules for which a student is permitted by his/her faculty to register in order to meet the requirements of their degree or diploma.

8.2 Registration Fees

The minimum amount payable for Registration purposes as decided by the University annually.

9. APPEALS PROCESS

A student has a right to appeal against any funding decision deemed unsatisfactory.

The appeal has to be directed to the head of Financial Aid who in turn should submit to the appeals committee of the Financial Aid Sub-committee.

10. COMPOSITION OF THE BURSARIES' PACKAGE

Within the overall parameters, and depending on a student's eligibility and income level, the Bursaries and Loans packages will contain one or more types of funding, applied in the following order:

10.1 Restricted Bursary

Awarded according to the donor's criteria.

10.2 University Administered Bursary

Awarded to entrants and returning students on the basis of financial need and academic performance.

10.3 University Funded Bursary

Awarded to entrants and returning students on the basis of financial need and academic performance.

10.4 University Administered Bursaries

Where external scholarships or bursaries are awarded before the packaging process begins, their total value will be taken into account as the first award before the University bursary is awarded. If an external scholarship or bursary is awarded after the package has been allocated, then the loan and/or bursary/loan components of the package will be reduced after the own contribution has been covered.

11. PAYMENTS

11.1 Food and Accommodation Allowances

Students in receipt of University Administered Bursaries may claim the first three month's Accommodation Allowance (if staying in private accommodation) once the Student Accounts (Finance Department) has been notified by the Student Financial Aid Office of the award. Subsequent and final claims may only be made once all documentation has been completed, and the awards credited to the student's fee account. In the event of a student being in receipt of NSFAS funding, payment will not be made in the name of a student, but in the name of a third party, e.g. parent, home owner, spouse, etc. Credit balances as a result of bursaries may be paid out to students, upon submission of a written proof by a bursar.

11.2 Living Allowances

Students in receipt of University Administered and University Funded Bursaries or Loans may claim the first half of the living allowance (travelling) permitted once the Student Accounts has been notified by the Student Financial Aid Office.

Subsequent and final claims may only be made once all documentation has been completed, and the awards credited to the student's fee account, and the award has been credited to the fee account. In exceptional and special cases, the Financial Aid Office will motivate for the payment of advances, in lieu of food and accommodation allowances. A specific amount will be budgeted for annually to accommodate the requests of cheque advances. In the event of a student being in receipt of NSFAS funding, payment will not be made in the name of a student, but in the name of a third party, e.g. parent or spouse. Credit balances as a result of bursaries may be paid out to students.

11.3 Bursary Advances

Students who require medical equipment, e.g. Dentistry students who require dental equipment, may apply for advance payments in favour of Dental Equipment Suppliers. These advance payments will form part of the annual budget for advance payments.

11.4 Waiting period for payments

Cheque requests will be authorized by the Head of the Financial Aid Office. It can take up to 7 working days for cheques to be ready for collection, once the Finance Department has confirmed/approved. The waiting period for cheques to be collected should never exceed 10 working days.



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1. PREAMBLE

A significant number of students at UWC are coming from families who cannot or hardly afford higher education, but the extent of resilience and dedication is phenomenal. Informed by the well known history of the Institution, and the sacrifices it had to make, and the resultant financial difficulties that ensued, the university, over few years, received generous funding from Desmond Tutu Trust as part recognising the inherent strengths of students in offering academic and other forms support to other students. After some time, the funding ceased to exist and the university had to provide resources within its available funding to finance this important programme. The Workstudy Programme, therefore, instilled a significant departure from the bursary handout system to the benefit of both the institution and the individual student/s, through a mutually beneficial exercise.

One of the principles that underpin the policy change is to depart from a one-dimensional approach that only focuses on academic excellence. The policy as revised, seeks to address a second dimension, namely, a Development Fund.

A Development Fund is defined as a fund aimed at supporting registered students who are not guaranteed financial support but have the potential to achieve academic excellence.

2. THE WORK-STUDY PROGRAMME

The Work-Study Programme is located in the Financial Aid Office. The Work-Study Programme Coordinator is responsible for the daily administration and implementation of the policy relating to the Programme. The Salaries Office/Payroll Office located in the Human Resources Department is responsible for the monthly payment of stipends to student assistants.

Responsibility for policy relating to the Work-Study Programme is vested in the Financial Aid Sub-committee with approval for submission from the SDSSC (Student Development Support Services Committee) to Senate for ratification. The Committee meets quarterly to discuss important Work-Study matters.

3. SCOPE OF POLICY

The policy applies to funding allocated to departments participating and were allocated funds budgeted from the Work-Study Programme. It does not apply to any other funding outside the work study allocation, including funding earmarked for a similar purpose.

4. RECRUITMENT OF STUDENT ASSISTANTS

Each department must assess its needs for student assistants and make its own provisional appointments, contingent upon the confirmation of the budget.

- All Work-Study opportunities/vacancies must be advertised.
- All appointments made by departments are provisional and subject to:

4.1 ADVERTISING

- (a) Advertising work-study positions is the responsibility of the Departments;
- (b) Advertisements should be placed on the Departments' notice boards and where and when possible, in the On-Campus bulletin; and
- (c) The Work-Study Office must be given a copy of the adverts

4.2 SELECTION CRITERIA

The following applies to the appointment of students In the Work-Study Programme:

- (a) The recruitment and selection of students should be competitive (the most suitable, qualified students should be selected)
- (b) All qualifying UWC registered students are eligible for selection, although financial need still remains one of the main criteria.
- (c) Financial need: A fundamental aim of the programme is to assist students with financial difficulties but who show academic potential. Every attempt must be made to offer financially needy students jobs, which do not necessarily require a high level of academic expertise (administrative duties). Academic development positions would ideally be offered to academically stronger students even though it might mean that these positions would be offered to full cost bursary holders. Exemptions to this effect must be submitted to the Work-study Office in writing for consideration.
- (d) Students qualifying for 100% rebates shall be eligible for administrative assistantships. Conditions for approving this must be submitted in writing to the Work-Study Office

4.3 SELECTION PROCEDURES

- (a) Departments must interview applicants before making final decisions with regards to appointments.
- (b) Until funding has been confirmed all applications are provisional and subject to funding being available. Departments should not notify prospective student assistants about appointments until the Work- Study Office has approved the recommendation.
- (c) A list of recommended student assistants as well as assessment forms must be returned to the Work-Study Office, where the information will be verified before appointments are made. Appointment forms should only be handed to the successful candidates.

4.4 DEVELOPMENT FUND

Create a development fund that will make it possible to identify students who are registered but are not guaranteed financial support. These students will be identified through various means including the SCM clearance process. This is aimed at providing support that will enable them to succeed in their academic commitments. The cases will be assessed by the Financial Aid subcommittee.

4.5 MONITORING AND EVALUATION

Upon the recommendations from various units of the University, the Financial Aid subcommittee will approve the recommendations and the outcome will be communicated to the appropriate units.

The work-study programme focuses on experiential learning, which is linked to skills and knowledge transfer. In this regard, all programmes in the units that use work-study funds will be monitored in terms of implementation and impacts will be evaluated. Unit reports will inform the work-study report which will be tabled at a Financial Aid subcommittee meeting. The comprehensive report from Financial Aid subcommittee serves at the SDS committee.

4.6 EXCLUSION CRITERIA

(a) Staff members' dependants who are students, in receipt of staff rebates at UWC, may not qualify for work study student assistant programme.

4.7 APPOINTMENT PROCEDURES

- (a) All successful applicants should complete the Service Agreement (SA)
- (b) All final appointments must be approved by the Work-Study Office.
- (c) The rate of pay should be in accordance with the Programme payment guidelines. No deviation is allowed.

5. SUBMISSION OF DETAILS OF APPOINTED STUDENT ASSISTANTS TO THE WORK-STUDY OFFICE

(a) The following forms should be submitted to the Work-Study Office within one week after the department has made the recommendation for the appointment of a student assistant.

- Fully completed original Appointment Detail Form
- Bank Details form

(b) The Department concerned will be notified within three days about the outcome of an application for a Work-study application appointment.

(c) The Work-Study Office will adjust the rates of pay or withhold payment if the payment for a student assistant is not in accordance with the recommended work-study rates and/or guidelines

(d) If a Department omits any information, the forms will be returned to the department for rectification. This could result in a student assistant not being paid in the first month of employment.

(e) Student assistants are required to submit their bank account details when the appointment is made.

6. CATEGORIES OF WORK-STUDY OPPORTUNITIES

6.1 General Administrative Assistants (Level I)

THE SCHEDULE OF STIPENDS WILL BE REFLECTED AS PART OF AN ADDENDUM IN THIS DOCUMENT.

6.1.1 Administrative Assistant (AA)

This category applies to undergraduate students with financial difficulties whose services are required in academic, administrative and service departments to undertake a range of administrative duties.

6.1.2 Academic (level II)

(a) Laboratory/Practical Demonstrators (LA)

Senior undergraduate students i.e. third/fourth year and graduate students employed mainly in laboratories to assist with practicals.

(b) Junior Tutors (TA)/Technical Assistants

Undergraduate and graduate students engaged in faculties and/or departments in tutorial work. The computer laboratories and Audiovisual

Services also employ technical assistants similar to the description of Junior tutors.

(c) Research Assistants (RA)

Graduate and senior undergraduate students employed in different faculties/departments to do field and laboratory research and work in libraries.

(d) Community Assistants (CA)

Undergraduate and graduate students mainly from the Faculties of Dentistry and Community and Health Sciences engaging in community outreach work.

6.1.3 Graduate Assistantships/Postgraduate Tutorship

As part of its strategic plan for the next five years (2010-2014) the University seeks to grow its postgraduate student population from 20% to 33%. In addition to this all units within the university are tasked with embedding graduate attributes into the curricula and co-curricula at all levels including postgraduate level. Graduate attributes are the values, skills, understanding and qualities we expect students to develop by the end of their programme of study. In this regard a graduate should demonstrate a critical attitude toward knowledge; she/he should be engaged, committed and accountable socially; she/he should be a life-long learner. They should be critically and relevantly literate; skilled communicators and collaborative.

We need to ensure that the graduate attributes are developed among our graduates and that we produce graduates who are able to contribute to the knowledge economy. In this regard the University needs to tap into its pool of talented Masters and Doctoral candidates to support the development of the undergraduate programmes and to improve the throughput and graduation rates as well as the time to degree. To this end the University has introduced an award, the Graduate Assistantship (GA). It is envisaged that the GA programme will provide the support to the undergraduate programme that is needed to allow us to face the challenges as identified through, among others, institutional research, reports on University pass rates especially in gatekeeper courses and other means (e.g. NBT results). Masters and Doctoral students are eligible for the award.

Eligibility

Masters and Doctoral students may apply for the Graduate Assistantships. A task team will meet to look at the suitability of the applicant for the GA position. Only students who are in good academic standing should apply. A student who does not have the support of his/her supervisor will not be able to take up the award.

Requirements

Masters students should be able to lead two tutorials in their disciplinary area per week. Doctoral students should be able to lead three tutorials per week. Students should progress in their own studies.

6.1.4 Coordinators

Tutoring Coordinators (COOR) level (III) /Lab Managers

Post-graduate students employed to supervise tutorial programmes /manage labs in different faculties/departments, to assist with training of junior tutors, to undertake assessments of tutorials, etc. Tutoring Coordinators/Lab Managers are only employed when the department employs 10 and more tutors.

7. SERVICE AGREEMENTS

(a) The Departments and student assistants will be expected to jointly outline expectations once they have been offered and accepted service agreements. The agreement will stipulate conditions and a code of conduct.

This service agreement is included in the Appointment Form.

(b) Flexible working hours may be arranged between the departments and student assistants subject to a maximum average of 10 hours per week for undergraduate students and 15 hours but not more than 20 hours per week for graduate students.

(c) Any claims of more than 40 hours (for undergraduates) and 80 hours (for post-graduates) per month will be regarded as an excessive claim and departments responsible will be liable for extra payment. It is the responsibility of departments to ensure that the students can be supervised and that they will not be overloaded with work. The Work-Study Office therefore recommends that if money is available, more students be employed instead of allowing one student assistant to exceed the number of maximum hours worked.

An exception is also made for the registration/peak period. Students will be allowed to exceed the maximum amount of hours they are allowed to work. This however, holds only for the period January-March and the December peak period. However, It is advisable to appoint more students to alleviate the escalation of hours. (Awaiting HR's feedback).

(d) Record should be kept of the daily hours worked and should be signed by both the student assistant and the supervisor/coordinator.

(e) Students may not sign contracts with more than one department concurrently,

(f) The students' service agreement is for 1 academic year renewable, depending on academic progress.

8. EVALUATION AND ASSESSMENT

All academic and non-academic departments, Centres and Institutes receiving support from the Work-Study Programme are required to submit semi-annual reports to the Work-Study Office within 15 days of the end of term.

8.1 Mid-year evaluations

The reports cover all participants in the Work-Study Programme, i.e. student assistants, project coordinators/ leaders, departmental chairpersons, etc. Project coordinators are required to evaluate student assistants individually, as well as each individual project. In addition to this, the Department Chairperson may be required to submit a substantive report of not more than 2 pages on the impact of the programme/ project on departments' deliverables.

8.2 Year-end evaluations

Each project coordinator may be required to submit a progress report for each individual project; or the departmental Chairperson may be required to submit a comprehensive progress report. The format of the evaluation reports may change from time to time. The Work-Study Office will inform departments of the format which will be required at least 4 months before the due date. If the Work-Study Office does not request evaluation reports, or does not specify the format, the Project Coordinators with the Department Chairperson are required to submit joint departmental progress reports to the Work-Study Office by the stipulated due dates.