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Luthuli Cultural and Welfare Services
(LUTHULI MEMORIAL TRUST)
RECOMMENDATIONS ON SCHOLARSHIP ADMINISTRATION
SEAMUS JEFFRESON
MAY 1990

CONTEXT

The purpose of the study has been to develop administration systems best suited to run the Trust's recently expanded scholarship programme.

I have drawn on the experience of World University Service (WUS) and Africa Education Trust (AET) and synthesized the best aspects of their scholarship administration procedures to fit the unique features and circumstances of the Luthuli Trust's programme.

As the programme develops however, modifications will be needed to suit the changing conditions. The recommendations contained in this report provide a starting point for the programme as it stands.

I have included some recommendations for the administration of the scholarships inside South Africa. This requires appropriate follow up in South Africa itself to set up the necessary procedures to enable the effective running of the programme there.

It will also be important to link the South Africa based scholarships appropriately to the London office and thus maintain the cohesion of the programme as a whole.

The detailed recommendations are divided thus:

Dealing with enquiries

Processing of Applications

Selection procedure

Administrative follow up - post selection

Reception and orientation of new students

Student files and records

Student payments and Allowances

Monitoring academic progress

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Ongoing contacts with students, welfare and counselling

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. Administrative procedures for students completing study/sponsorship

11. Staffing

12. Administrative procedures for South Africa based students

13. Other issues/recommendations

In addition I have created a scholarship administration manual for day to day guidance on the running of the programme. a new application form, an awardholder's pack as well as accompanying documents such as staff contracts, salary scales, student folders. notes on reporting to donors and so on.

I would suggest a review of the suggested arrangements in around nine months time in order to determine how the programme is progressing following these recommendations and to make any necessary modifications.

1. ENQUIRIES

Large numbers of enquirers falling outside the scope of the Trust's work can take up plenty of administrative time unless they are dealt with using a few standard letters and an appropriate filing system.

Non South African applicants should be referred in a standard letter to the British Council (either in their own country or here in the UK) for further information regarding scholarship opportunities.

South African enquirers. writing from South Africa should be referred to the Luthuli committee inside the country who will undertake the initial steps of the selection process.

South African enquirers wishing to study in the UK or elsewhere should be sent an application form together with a covering letter stating clearly when the completed form must be returned by.

2. PROCESSING OF APPLICATIONS.

The revised application form is designed to provide information necessary for the selection committee to make a decision (reasons for studying a particular course, intentions after study etc.). as well as administrative information for the Trust (visa details etc.).

The applications will be accompanied by 8 Curriculum Vitae, relevant academic certificates, offer of a place to study (conditional or unconditional) and two references.

The applications should be acknowledged in a letter that requests additional information/documentation where necessary as well as letting the candidate know when a decision will be made.

INTERVIEWS

Interviews are recommended for all candidates in the UK. As most South African students have not had access to careers advisors and are often not acquainted with the UK education system. special scrutiny should be made of the course chosen and institution applied for. In addition the Trust needs to be confident that the applicant has the necessary educational background and ability to complete the course s/he is applying for. An offer of a place alone should not necessarily be sufficient evidence of this. Overseas students provide valuable income for universities and polytechnics and for this reason institutions often do not show adequate integrity when offering places to overseas students. '

3. SELECTION PROCEDURE.

I would strongly recommend that the awards committee meets twice a year specifically to select students for the scholarship programme (as is standard practice with other UK scholarship agencies). Candidates wishing to study in South Africa should be considered in November prior to the academic year beginning in January. Candidates studying in a location where the academic year begins in September/October should be selected in July. Selecting candidates as and when they apply is administratively time consuming and does not enable the awards committee to compare the merits of each candidate along side one another.

A facility to award a few late or emergency grants should be retained.

A deadline of 15 June (or 15 October for South African candidates) should be set by which time all completed applications need to have arrived at the Trust's office. The application forms need to be sent to the committee for prior consideration two weeks before the selection meeting.

The selection meeting could begin with a report from the Director. followed by an assessment of the financial situation enabling the committee to see how many . awards they can make. The committee could then consider the progress of current students. If students have failed and are requesting a repeat year this should be considered by the committee. In these cases the Director should prepare a recommendation for the committee on the advice of the students' Tutors and taking into account any extenuating circumstances. Students completing their courses but requesting sponsorship for a further course should then be considered. Finally new candidates should be considered.

SUGGESTED CRITERIA FOR SELECTION

The following criteria are designed as a guide & are not necessarily in order of Priority

1. SUBJECT AREA. Is the topic of study relevant to the development needs of a future democratic South Africa ?
2. INABILITY TO PAY. Does the candidate have any other source of income to draw on for education ?
3. INTENTIONS AFTER STUDY. How does the candidate intend to use the . qualification having completed the course ?
4. LACK OF EDUCATIONAL OPPORTUNITY. Has the applicant been denied the opportunity to study up to a reasonable level ?
5. PRIORITISATION OF WOMEN CANDIDATES. Women are usually underrepresented on scholarship programmes for South Africans and face many impediments when wishing to study. This being so, the committee should consider adopting a policy of giving women candidates special consideration. perhaps aiming for a given percentage of awards each year to go to women.
6. ACADEMIC ABILITY. Is the candidate academically strong enough to successfully complete the course ?

4. ADMINISTRATIVE FOLLOW UP POST SELECTION.

Candidates need to be informed of the awards committee's recommendations as soon as possible after the meeting.

Unsuccessful Candidates should be informed that their application has been turned down due to the financial limitations of the programme. More detailed explanations to candidates of awards committee decisions can lead to protracted debates.

Candidates put on a 'waiting list' (for instance pending confirmation of funding). should be informed of the fact and told when they are likely to hear if they have been successful.

Successful candidates should then receive:

- i) a letter informing them of the award,
- ii) a 'To Whom It May Concern' letter outlining details of the (award for immigration purposes. ., "
- iii) the Terms and Conditions of the award together with a declaration form to sign and return.

5. RECEPTION AND ORIENTATION OF NEW STUDENTS.

All UK based students must come to the office to see the Administrative Secretary prior to beginning their course. The Administrative Secretary should assist as far as possible with arrangements for students newly arrived in the UK.

Students will then be presented with their awardholder's pack introducing them to the Luthuli Trust, explaining the running of the scholarship programme, and containing some details about study in the UK. The Trust will then take the opportunity to meet the students and clarify important details such as his/her address, bank details and so on. Students based in South Africa and others based outside the UK will be sent modified packs.

6. STUDENT FILES AND RECORDS.

Each student should have a file containing the following information:

1. Study details (Course, location, duration. name of Tutor, details of field trips or industrial placements required during the course).
2. Financial details (bank account information).
3. Address and contact phone number.
4. A sheet detailing each payment made to the student.

The student file will contain the original application form as well as all subsequent correspondence and documentation relevant to that student. The file will be kept strictly confidential.

Files will be arranged according to the country where the student is studying and in alphabetical order.

7. STUDENT PAYMENTS AND ALLOWANCES.

I strongly recommend that allowances for UK based students are indexed to British Council rates. This seems to be the most equitable index for overseas students studying in Britain, and is used by both WUS and AET. Students need to be informed which payments are due to them, when they will be made and how to apply for discretionary payments. Guidelines for discretionary and emergency payments are contained in the administrator's manual. Maintenance/stipend payments to students should be paid monthly to UK based students and termly to overseas based students by Standing Order or bankers draft. Tuition fees should be sent directly to the Trust for payment.

Students based outside the UK should continue to be paid the amount recommended by their institution. As far as possible the same guidelines should apply for discretionary and emergency payments, although local considerations will have to be taken into account.

8. MONITORING ACADEMIC PROGRESS

A letter needs to be sent to the Tutor of each Student explaining that s/he is sponsored by the Luthuli Trust and outlining the nature of the Trust. The Tutor will be requested to complete a progress report regarding the student twice a year. The Tutor should be encouraged to contact the Administrative Secretary if the student is having particular difficulties. The progress report and contact with the Tutor in general will be the basis for identifying students' problems at the earliest possible opportunity. Most tutors are pleased to hear from sponsors and prove helpful and responsive when asked to assist sponsees.

The primary purpose of monitoring a student's academic progress is to gain early warning of problems and thus enable time to work them out. Possible assistance might include some kind of extra tuition for the students or the course or level of the course could be changed. The situation to be avoided is for the student to fail a year and face either a whole repeat year or termination of the award.

9. ONGOING CONTACT WITH STUDENTS, WELFARE AND COUNSELLING,

A scholarship agency needs to find a balance between being in too frequent contact with students (making them reliant on the agency), and not being accessible enough so that student problems only manifest themselves when it is too late. Too much time spent with students will leave Luthuli staff with little time for anything else. There are a number of ways to make contact with students of optimum efficiency.

1. Pre-empting as many problems as possible in the Student's pack and in initial contacts with them.

2. Referring students whenever possible, to Students' Union/College/or local Authorities facilities.

3. Referring serious cases to specialists (ie Medical Foundation for the victims of torture, alcohol counsellor etc.).

4. Sending Administrative Secretary/counsellor on appropriate counselling course.

A student conference should be held in around October of every year for UK based students. This will allow students to discuss issues and concerns regarding their scholarships with the Trust. provide an opportunity for awardholders to meet each other and help to foster a sense of assimilation with the aims and ideals of the Luthuli Trust. Although a conference would necessitate incurring extra costs in the short term, it would also save hours of administrative and student counselling time during the rest of the year by pre emptying issues and problems that students might face. Both WUS and AET have found student conferences invaluable and I suggest that the Trust approach donors for the funding of an annual conference.

10. ADMINISTRATIVE PROCEDURES FOR STUDENTS COMPLETING STUDY/SPONSORSHIP.

It is important to establish students' intentions well before they complete their current course. If a student wishes to apply for a further award the Trust needs to know in plenty of time so as to prepare the necessary application documents for the selection committee. The Trust also needs to know when students (who are not re applying) are completing their courses and roughly what their intentions are. In April (October for students in SA) of each year a letter needs to go to all the students who are due to complete their courses asking if they intend to re apply for a further award.

Students re applying need to submit a new application form for consideration by the awards committee. The deadline for such submissions will be the same as for new applicants. The Trust should solicit a recommendation on the proposed course from the student's Tutor. This will be essential for the committee to make a decision. Students who are not re applying will receive a questionnaire, the intention of which will be to assess the student's satisfaction with the course, administration of the scholarship, how s/he feels the scholarship has benefitted them, and the student's intentions having completed the course. This information will prove invaluable in improving the performance of the Trust's scholarship programme, as well as providing data that can be fed back to current and potential donors.

1.1. STAFFING.

In addition to the Director and part time Finance Officer, I would recommend that the Trust engaged two further full time staff to run the scholarship programme.

ADMINISTRATIVE SECRETARY/STUDENT COUNSELLOR

The role of the Administrative Secretary/Counsellor will be to assist the Director in the day to day running of the scholarship programme. S/he will primarily be concerned with student matters both for applicants and ongoing awardholders.

SECRETARY/RECEPTIONIST

The secretary will operate the switchboard, deal with enquiries and service the Director, Book keeper and Administrative secretary, with necessary typing. administrative etc.

I recommend NJC local government indexed salary scales as used by WUS and AET and outlined in the documents accompanying the scholarship administration manual.

12. ADMINISTRATIVE PROCEDURES FOR SOUTH AFRICA BASED STUDENTS.

As far as possible procedures for the running of the programme in South Africa should be in line with those in the UK. Applications for study in South Africa should be considered by the committee in South Africa before being forwarded to the UK committee for final approval. The committee in South Africa will be responsible for reporting on the programme in that country.

I recommend that the Trust employs a scholarship administrator in South Africa to assist in administering the growing number of awards there. The administrator would liaise with the Luthuli committee in SA and be responsible for administering funds to students, and reporting financially to the Trust in London. This would be greatly more effective than the current procedure (ie administering the scholarships direct from London).

13. OTHER ISSUES/RECOMMENDATIONS DEPENDENTS ALLOWANCE

The Trust needs to consider making provision for the children of students on the scholarship programme. Ostensibly such provision is intended to widen access to the programme for students who have to have their children with them when they come to study. In practice this mostly applies to women students. AET, WUS and Canon Collins all make provision for the support of students' children on a case by case basis. Although I recommend provision of such an allowance, extreme caution should be exercised in administering such grants. The experience of the other agencies shows that looking after a child whilst engaged in full time study is extremely difficult and often impossible. Such grants should be made only to students who have no choice but to have their child/children with them.

Child provision in London is scarce and very expensive. Before awarding a scholarship to a student wishing to bring her child or children, the Trust needs to establish if the place of study has creche facilities, if there is a spouse or friend to assist as well as determining the intensity of the course. A judgement can be made through conversations with the student concerned, the college welfare officers and Tutors. The Trust should determine if there are alternative arrangements that can be made, for instance, for the child to stay with a relative. In reality it is often the case

that the student has the child/children with them already, thus provision of a special allowance will enable the student to cope better with their studies. It is important though that access to the scholarship programme should be as wide as possible, this is the intention of a policy on dependents provision.

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Inevitably students wish to visit the region during the long vacation. This can easily be facilitated in most cases by advancing the July and August maintenance grant early enough for the student to buy a return ticket. Students should only make the trip if they have successfully completed exams. This is the practice of other UK scholarship agencies.

INTER-AGENCY CONTACT

The circumstances surrounding SA students studying in Britain are constantly changing as are the priorities for scholarship provision for South Africans. A regular meeting of the scholarship agencies running programmes for South Africans in UK (Canon Collins, AEL', WUS, Christian Aid, British Council, Commonwealth Secretariat) would be of great value. Such a forum exists for agencies involved in Namibia work (Namibia Education Group) and The Joint Committee on Southern African Scholarships links together 'Campus' scholarships. Talks with the other relevant agencies need to take place to explore the possibilities of such a forum.

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ASAS was formed just over a year ago to represent South African students studying in Britain. They have good relations with most of the major agencies sponsoring their members. I would recommend that The Luthuli Trust assists their work where possible. ASAS will prove useful for Luthuli sponsees especially those studying in isolated locations who are not in contact with their fellow South African students. ASAS hold national and regional events and aim to provide educational welfare and social assistance to their membership.

ASSISTING STUDENTS AFTER COMPLETION OF COURSE

Having completed their course, students should be given necessary guidance and assistance in obtaining work experience to compliment their studies. Careers guidance is not readily available for South African students in Britain or elsewhere. As The South African Advanced Education Programme (SAAEP) have shown, some employers, local authorities and so on are receptive to requests to take on South African students for short periods of work experience. If a large enough number of students require such assistance a separate budget from the donors should be sought for this type of provision.

CONCLUSION

The success of any scholarship programme for South Africans depends partly on a clear definition of the aims of the programme and partly on the efficiency of its administration.

In the period of transition to a democratic, non racial South Africa, regular attention to the aims of the programme will be paramount. In the meantime I hope the administrative structures recommended in this report will serve its current needs.

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