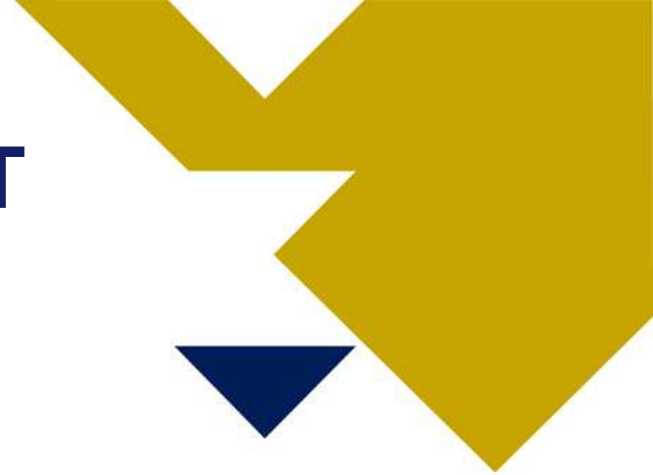
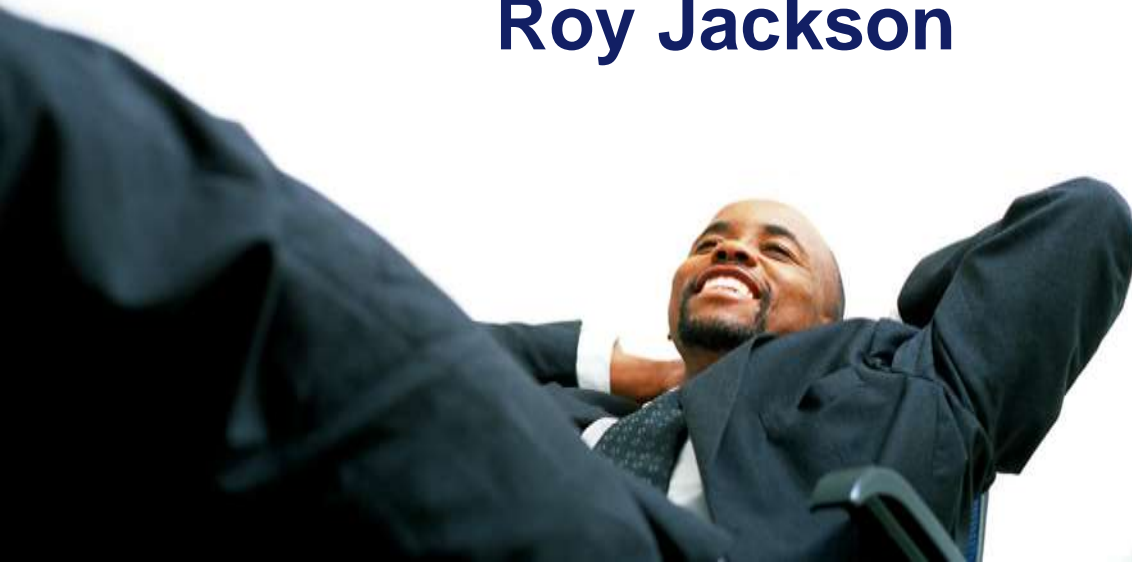


5th Pan African TVET & FET Colleges Conference

**Proper Systems make TVET and FET
College Management so much Easier**

Roy Jackson

**Cape Town
November 2014**



Roy Jackson

- **TEFSA – Tertiary Education Fund of South Africa (1990 to 1999)**
- **NSFAS – National Student Financial Aid Scheme (1999 to 2003)**



**STUDENT
FUNDING**



I CAME TO UNDERSTAND THAT ...

**THE
SCHEME**

OR

**THE
FUNDER**

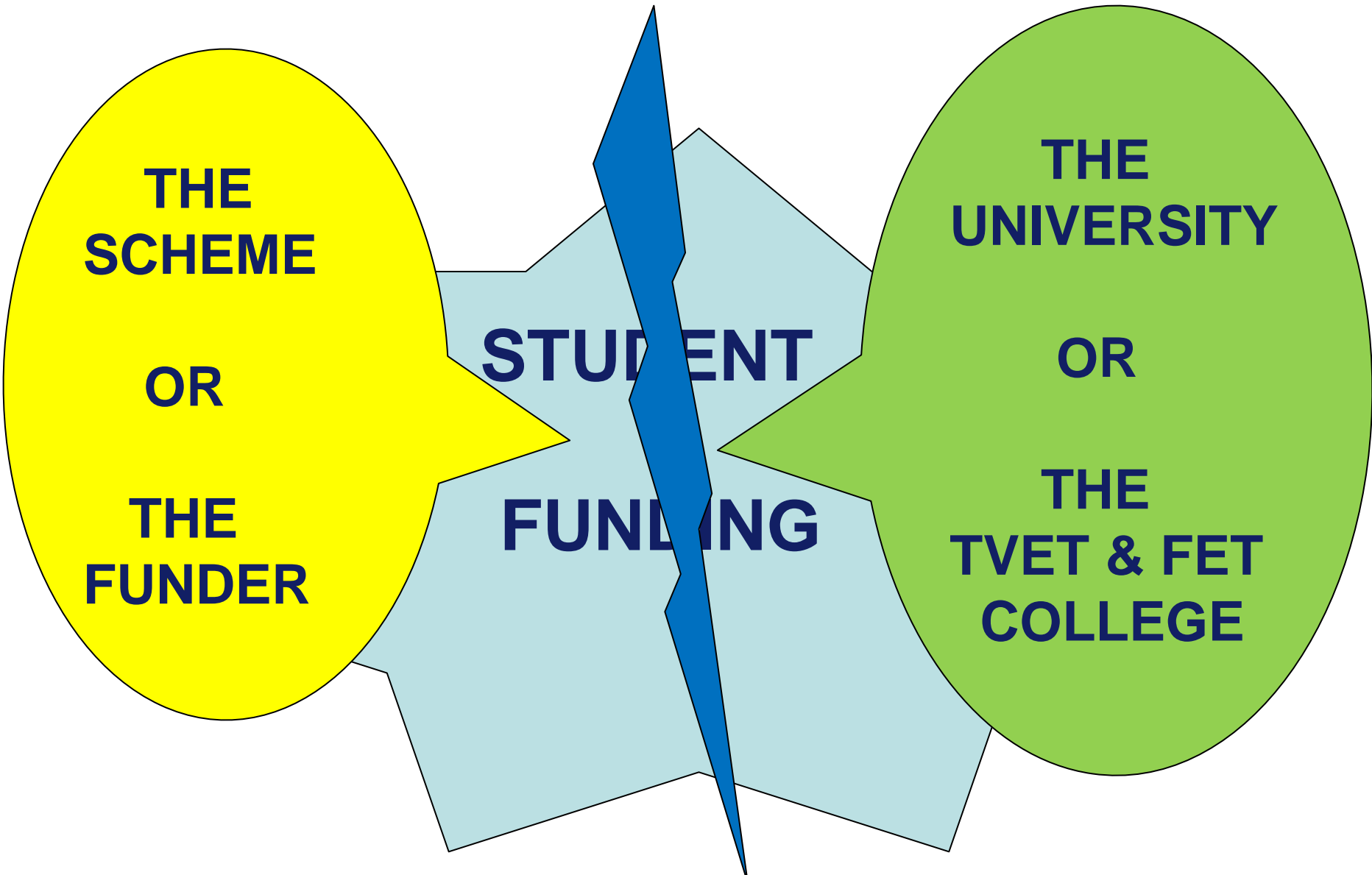
STUDENT

FUNDING

**THE
UNIVERSITY**

OR

**THE
TVET & FET
COLLEGE**

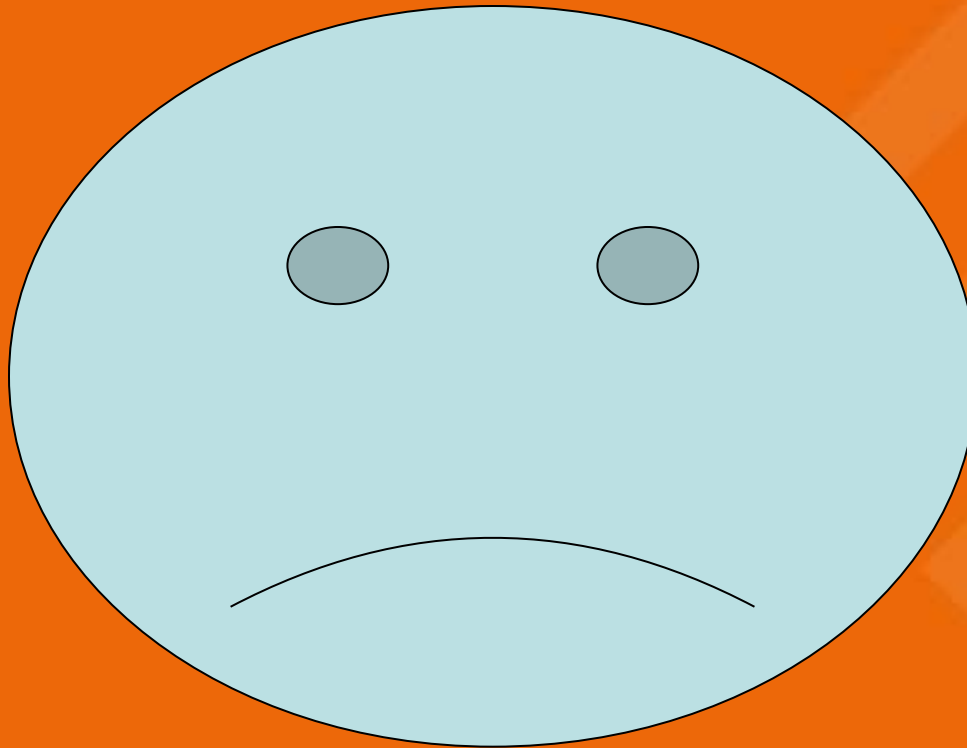


That there is GOOD NEWS ...

**SCHEMES and/or FUNDERS sponsor students in the form of
Bursaries and Loans**

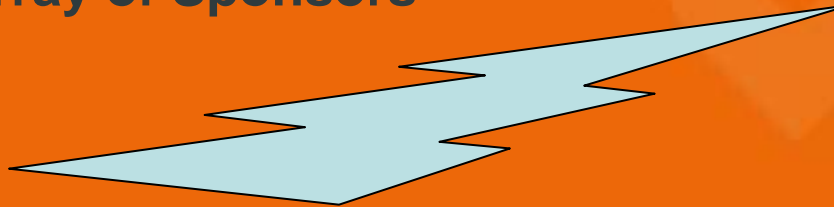


**I also Discovered that the 'GOOD NEWS'
brought challenges ...**



The FIRST Big Student Funding CHALLENGE for TVET and FET Colleges

- We want more money to assist our needy students
 - We know that the money will come from
 - The National Scheme
- OR
- An array of Sponsors



BUT

THE MORE MONEY WE GET

THE MORE THE
ADMINISTRATIVE
RESPONSIBILITIES
GROW

INCLUDING ...

- INVITING APPLICATION** for funding
- RECEIVING** and **PROCESSING** the Applications
- ADMINISTERING** the Means Test
- INFORMING** Applicants whether or not they were successful
- OFFICIALLY APPROVING** the successful Applicants and **ALLOCATING** funding to them
- PRINTING** the Loan and/or Grant Agreements
- SIGNING** and having the Agreements **SIGNED** by the students
- DESPATCHING** the Agreements to the Scheme/Funder
- REPORTING** to the Scheme/Funder

The **SECOND** Big Student Funding **CHALLENGE** for TVET and FET Colleges

Many Funders specify how the money should be spent on each of ...

- **Tuition Fees**
- **Accommodation (In a University Res or in 'Digs' Off-Campus)**
- **Food**
- **Books**
- **Stationery**
- **Cash**



The Easy Part

Administering the portion of a student's bursary or loan which is for the Institution's Account:

- Tuition Fees
- Accommodation in a University Residence



The Problem

Most Institutions lack the Capacity to Administer the other 5 Allowances

- **Accommodation Off-Campus in 'Digs'**
- **Food**
- **Books**
- **Stationery**
- **Cash**



Nightmare NUMBER 1

**... WHEN YOUR INSTITUTION DOES NOT
HAVE THE NECESSARY EXPERIENCE,
RESOURCES OR GENERAL
ADMINISTRATIVE CAPACITY TO DO SO**

•

Nightmare NUMBER 2

**... WHEN YOUR INSTITUTION DOES NOT HAVE
THE NECESSARY EXPERIENCE, RESOURCES
OR GENERAL ADMINISTRATIVE CAPACITY TO
DO SO**

The 2 Nightmares Rolled into One



DURING THOSE 14 YEARS IN STUDENT FUNDING I LEARNT THAT ...

- Many institutions have limited staff
- The **The 2 Nightmares Rolled into One** relative burden associated with
- Their Operations are inappropriate and inadequate

BETWEEN 2003 AND 2014 MY PARTNERS AND I HAVE BUILT SYSTEMS TO DEAL WITH ...



The 2 Nightmares

**WE WELDED 4
COMPANIES TOGETHER
TO CREATE ...
'CLOUDWORKZ'**

**FIN AID
SOLUTIONS**

INTELLICARD

**URNS
NIGHTMARE 1
INTO A
DREAM**

**URNS
NIGHTMARE 2
INTO A
DREAM**

**RECOVERS
OUTSTANDING
FEES**

**PROVIDES
SCHEMES WITH
LOAN & BURSARY
MANAGEMENT
PLATFORM**

**DEBT
TRACKER**

**PLATFORMS
THAT WORK**

Nightmare NUMBER 1

ATTEMPTING TO ...

- **INVITE APPLICATION** for funding
- **RECEIVE** and **PROCESS** the Applications
- **INFORM** Applicants whether or not they were successful
- **OFFICIALLY APPROVE** the successful Applicants
- **ALLOCATE** funding to them
- **PRINT** the Loan/Grant Agreement Forms
- Have the Agreement **SIGNED**
- **DESPATCH** copies of Agreements to the Scheme/Funder
- **REPORT** to the Scheme/Funder

Nightmare NUMBER 1

ATTEMPTING TO ...

- **INVITE APPLICATION** for funding
- **RECEIVE and PROCESS** the Applications
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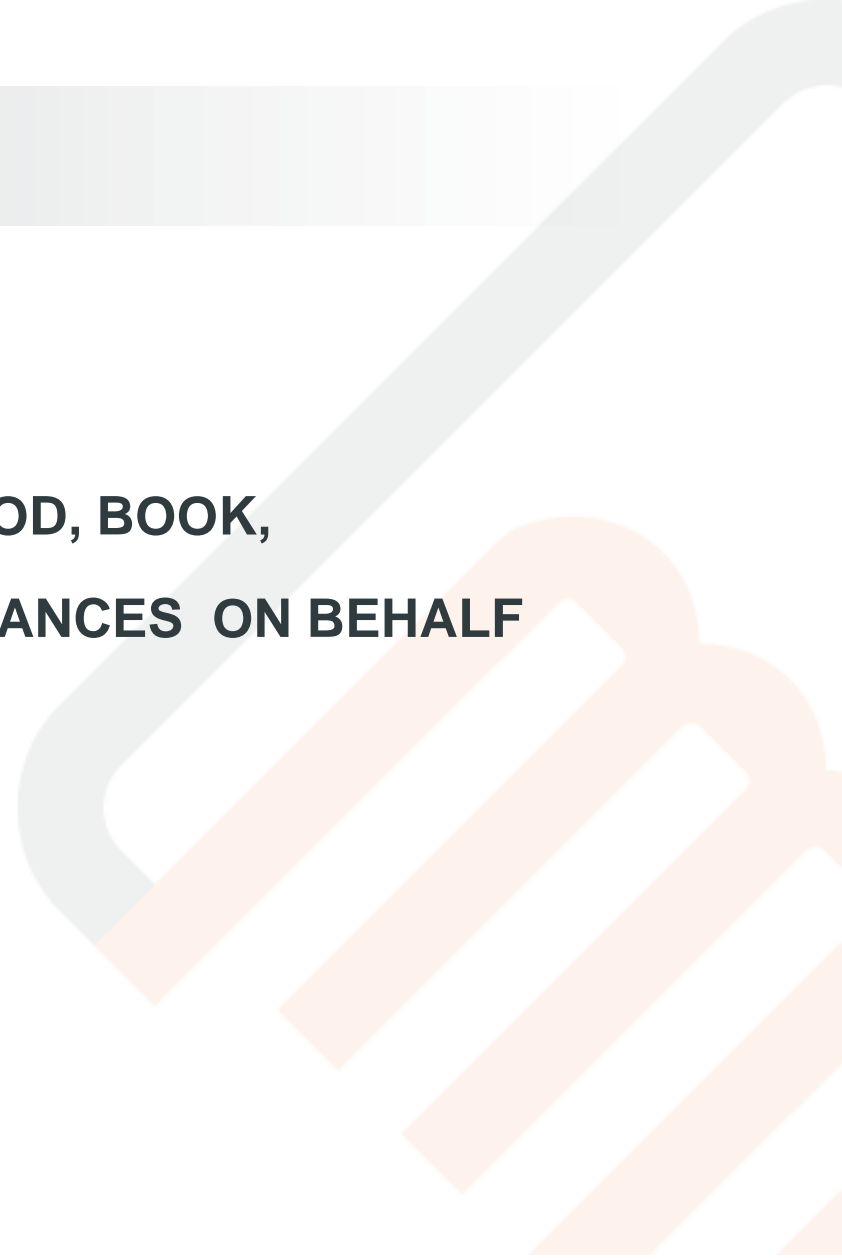
**FIN AID
SOLUTIONS**

**85% OF THE
ADMIN IS
DONE
ON-LINE OR BY
THE SYSTEM**

**Nightmare
Number 1
Becomes a
Dream**

Nightmare NUMBER 2

**ATTEMPTING TO ADMINISTER FOOD, BOOK,
STATIONERY AND CASH ALLOWANCES ON BEHALF
OF THE SCHEME/FUNDER ...**





IntelliCard 

Is the Answer to
this Nightmare



IntelliCard 

is Provided

FREE

to the COLLEGE

and

FREE

to TVET and FET

Students

It's FREE to your COLLEGE and FREE to your Students

The IntelliCard Solution

- **Contracts are signed**
- **The Registration Card or a new Card is enabled as the IntelliCard**
- **A Swipe Card Machine is Installed in 'Vendor' outlets**
- **IntelliCard receives a list of Students and their Allowances**
- **This Electronic Data is Loaded onto the IntelliCard Master Server**

And Then ...

- **Students buy Books, Food, Stationery, Etc**
 - **The Card is Swiped ... OR ... the Cell Phone App is Used**
 - **The System checks whether the Student has enough Allowance to pay for the Transaction**
 - **The Machine Produces a Print Out of the Transaction**
 - **The Student Signs the Print Out**
- **IntelliCard Pays the Vendors at the end of each month**
- **In Fact ... IntelliCard does ALL OF THE ADMINISTRATION**

ALL OF THE ADMINISTRATION



**WE WELDED 4
COMPANIES TOGETHER
TO CREATE ...
'CLOUDWORKZ'**

INTELLICARD

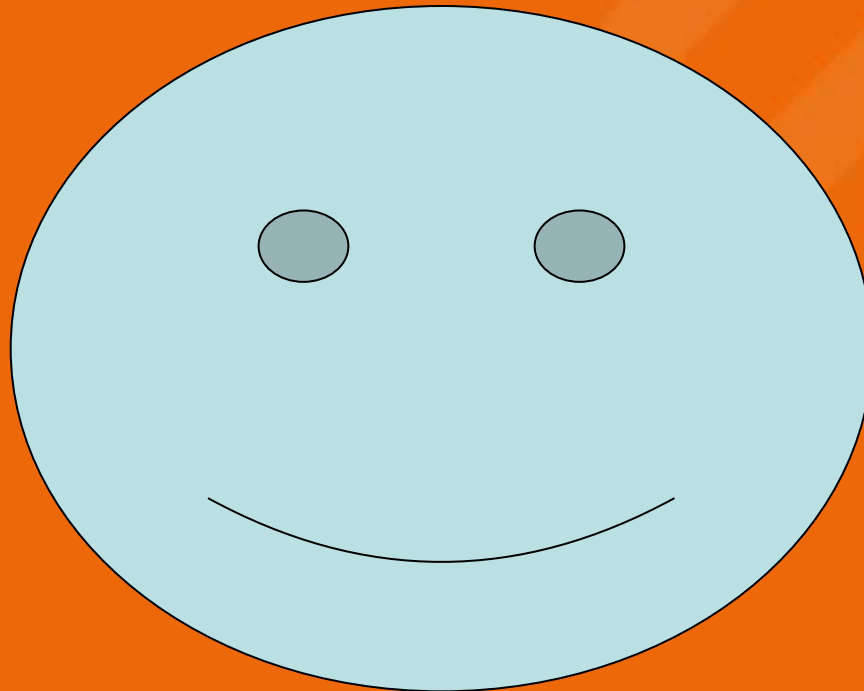
**ALL ALLOWANCES:
BOOKS, FOOD,
ACCOMMODATION,
ETC ARE MANAGED
BY INTELLICARD**

**Nightmare
Number 2
Becomes a
Dream**

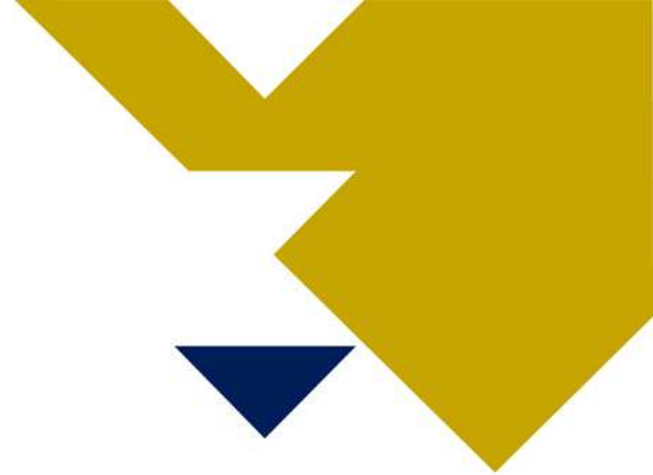
Tried and Tested Systems Have Turned

The 2 Nightmares

INTO A JOY



**Finally, we know that all
TVETs and FETs have
money owed to them by
students no longer
registered at the
Institution**



STUDENT DEBT

- **CLOUDWORKZ has the only system in Africa designed solely for the purpose of collecting unpaid fees from Student Debtors**
- **Used by most Institutions in SA we invite you to contact us if you would like any assistance with your burgeoning student debt**



**NO ONE
ELSE DOES
IT LIKE THIS**

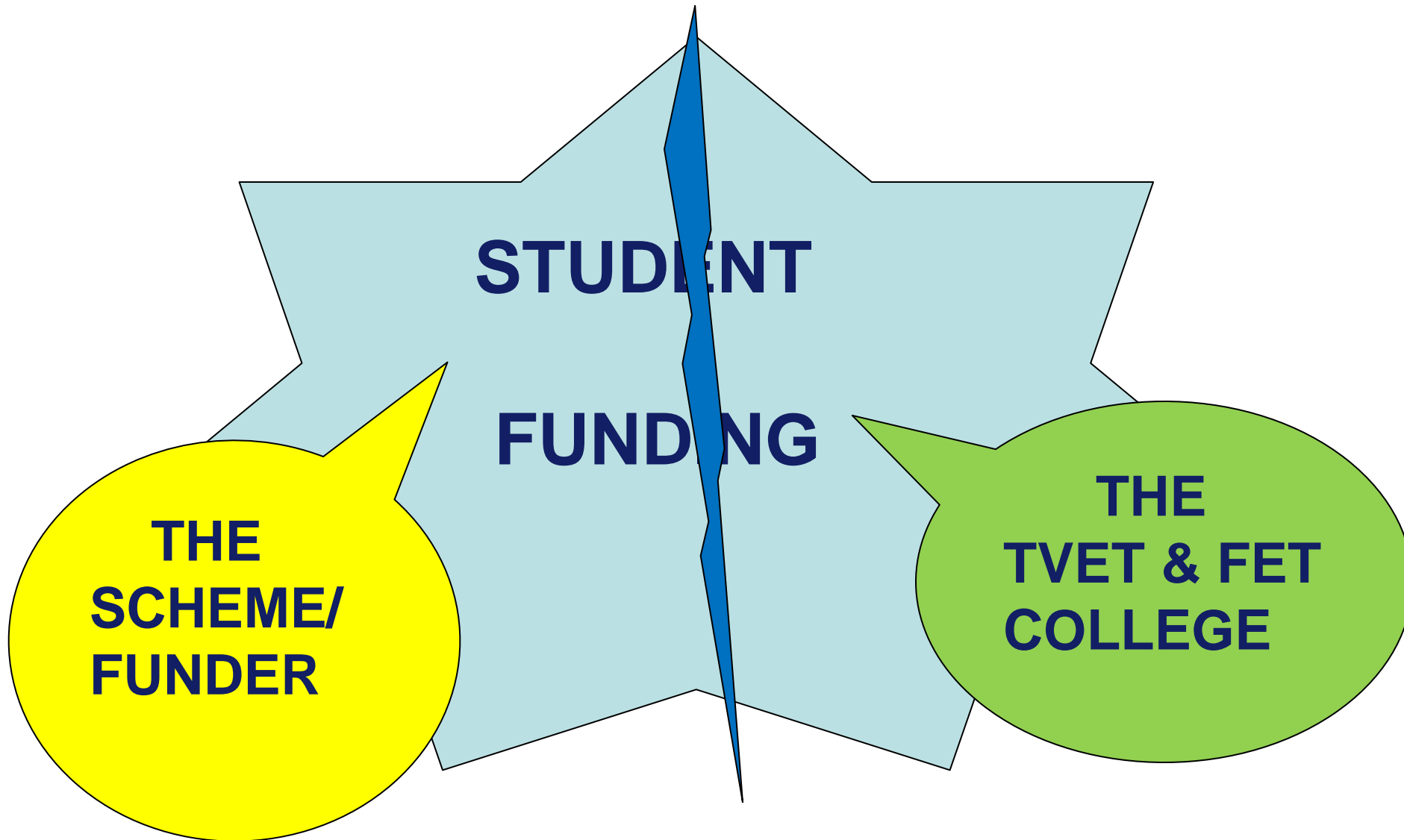
**WE WELDED 4
COMPANIES TOGETHER
TO CREATE ...
'CLOUDWORKZ'**

**RECOVERS ANY
OUTSTANDING
FEES
ANYWHERE IN
AFRICA**

**DEBT
TRACKER**

**Another
Nightmare
Is Taken Care
Of**

Today I have suggested that **STUDENT FUNDING** is a shared set of Administrative Responsibilities





**And that State of the Art Operating Systems
Can and Should Make the Responsibilities that
fall in the ambit of TVET and FET Colleges both
Enjoyable and DO-ABLE**



I PRESENTED 'CLOUDWORKZ' TO YOU

**FIN AID
SOLUTIONS**

INTELLICARD

**85% OF THE
ADMIN IS DONE
ON-LINE OR BY
THE SYSTEM**

**100% OF ALL
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INTELLICARD

**TVETs
and
FETs**

**TVETs
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SCHEME

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**State of the Art Operating
Systems Can and Should Make
TVET and FET Colleges
Management So Much Easier**

**Roy Jackson
+27 21 762 2344
+27 83 626 5536**





The End

Roy Jackson
+27 21 762 2344
+27 83 626 5536



Process Flow...



Capture
application for
funding
(bursary/other)



Approve
application and
allocate costs



Process
agreement (i.e.
print and sign
with applicant)



Extensive
Reporting
facilities



Manage
payments to
service providers



Create user
profile and
allowances on
Intellicard

Capture...



- **The learner has the ability to capture an application for funding.**
- **Alternatively a staff member at the SETA can capture an application for financial aid on behalf of a learner who has no internet access.**
- **During the applications process a learner captures:**
 - **Their biographical details**
 - **Contact as well as address details**
 - **Family structure and annual income (for means test)**
 - **Training provider and course details**

Approval...

- A SETA user with the appropriate access rights would log into the system and be able to review all applications for funding.
- Applications that meet the specified criteria of the SETA can then be approved and costs may be allocated to the learners application.
- Costs such as Tuition, Accommodation, Food, Books, Transport and a Living allowance may be allocated to the learner.
- The system has the ability to generate a letter, notifying the learner of the outcome of the application.

Process...

- **All the approved applications can now be processed by a SETA user with processing rights.**
- **Agreements between the SETA and the learner will be generated.**
- **The learner will be notified that they can sign their agreement with the SETA. This can be done:**
 - **Using a legally approved electronic signature or**
 - **Alternatively a paper copy of the agreement can be signed where the learner has no electronic facility to sign**
- **Successful applications can now be batched and processed i.e. they can be signed off and uploaded onto the IntelliCard system.**

Create...

- **Approved learner profiles are loaded onto the IntelliCard system together with their allowances.**
- **Learners are notified via SMS that their allowances have been uploaded onto the IntelliCard system and are also sent a pin.**
- **Learners are able to access their allowances as soon as they receive their pin.**

Manage...

- **Tuition and Accommodation will be paid directly to the Training and Accommodation providers respectively.**
- **Learners will be able to use their Food and Book allowances immediately at approved IntelliCard merchants.**
- **The SETA will receive regular status reports on the utilisation of allocated funds.**
- **SETA's will also have access to the IntelliCard website to draw reports and monitor the usage of allowances in real-time.**
- **The SETA is also able to disable a learners allowances if deemed necessary due to under performance or violation of SETA requirements.**

Reporting...

- **SETA's will be able to draw a variety of reports from the eLaf/Intellicard system including:**
 - **Utilisation of allocated funds**
 - **Statutory reports as required by DHET (e.g. Benefit template)**
 - **Reports on employees and training providers that have accessed SETA funds.**
 - **Any other reports as required can be developed / customised to the specification of the SETA**

Why use IntelliCard

- **Comprehensive end-to-end solution**
- **Tried and tested over 6 years**
- **You have full access to the system**
- **Extensive reporting capabilities**
- **Customisable to your requirements**

The Intelligent Solution