

merSETA

MANUFACTURING, ENGINEERING
AND RELATED SERVICES SETA

**ANNUAL PERFORMANCE PLAN
2019/2020**

Leaders in closing
the skills
gap

OFFICIAL SIGN-OFF

It is hereby certified that this Annual Performance Plan (APP) has been developed under the guidance of the merSETA Accounting Authority (AA), and that it takes into account all the relevant policies, legislative framework and other mandates that govern merSETA responsibilities, and accurately reflects the strategic outcome-oriented goals, objectives, indicators and targets that the merSETA will endeavour to achieve in the period 1 April 2019 to 31 March 2020.

Wayne Adams (Mr)

Acting Chief Executive Officer

Signature: 

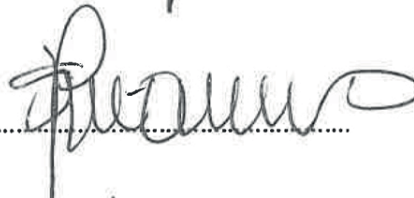
Ncedisa Mjikeliso (Ms)

Chief Financial Officer

Signature: 


Sheryl Pretorius (Ms)

Acting Chief Operations Officer

Signature: 

Ester van der Linde (Ms)

Corporate Services Executive

Signature: 


Sebolelo Mokhobo Nomvete (Ms)

Executive Strategy and Research

Signature: 

Lebogang Letsoalo (Ms)

Chairperson of the Accounting Authority

Signature: 

Approved by

Signature: _____

Executive Authority (Minister)

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LIST OF ACRONYMS

AA	Accounting Authority
AET	Adult Education and Training
APP	Annual Performance Plan
AGSA	Auditor-General of South Africa
AQP	Assessment Quality Partner
ARPL	Artisan Recognition of Prior Learning
ATR	Annual Training Report
BBBEE	Broad-Based Black Economic Empowerment
CAPEX	Capital Expenditure
CEO	Chief Executive Officer
CFO	Chief Financial Officer
COO	Chief Operations Officer
DHET	Department of Higher Education and Training
DTI	Department of Trade and Industry
DQP	Development Quality Partner
ECM	Enterprise Content Management
EEA	Employment Equity Act
ETQA	Education and Training Quality Assurance
FLC	Foundational Learning Certificate
G & S	Governance and Strategy
GDP	Gross Domestic Product
HEI(s)	Higher Education Institutions
HRDC	Human Resource Development Council
HRM	Human Resource Management
ID	Identity Document
ICT	Information and Communication Technology
IPAP	Industrial Policy Action Plan
ISO	International Organisation for Standardization
LRA	Labour Relations Act
M&E	Monitoring and Evaluation

MANCO	Management Committee
mer- sector(s)	Manufacturing, Engineering and Related sector(s)
merSETA	Manufacturing, Engineering and Related Services Sector Education and Training Authority
MHET	Minister of Higher Education and Training
MIS	Management Information Systems
MOU	Memorandum of Understanding
MTEF	Medium Term Expenditure Framework
NCPC-SA	National Cleaner Production Centre of South Africa
NLPEs	Non Levy Paying Enterprises
NPO	Non-Profit Organisation
NQF	National Qualifications Framework
NSDS	National Skills Development Strategy
PESTEL	Political, Economic, Social, Technological, Environmental and Legal
PFMA	Public Finance Management Act
PSET	Post School Education and Training
QCTO	Quality Council for Trades and Occupations
QMS	Quality Management System
RECP	Resource Efficiency and Cleaner Production
RPL	Recognition of Prior Learning
S & R	Strategy & Research
SA	South Africa/South African
SDA	Skills Development Act
SETA	Sector Education and Training Authority
SLA	Service Level Agreement
SME(s)	Small and Medium Enterprises
SP	Strategic Plan
SSP	Sector Skills Plan
TID	Technical Indicators Descriptions
TVET	Technical & Vocational Education and Training College
VAT	Value-Added Tax
WE/WIL	Work Experience/Workplace Integrated Learning

WSP	Workplace Skills Plan
4IR	4 th Industrial Revolution

PART A: STRATEGIC OVERVIEW

1 UPDATED SITUATIONAL ANALYSIS

The mer-sector situational analysis is informed by the triangulation of the primary and desk top research, consultation with different government and business/labour constituencies the details of which are contained in the Sector Skills Plan (SSP).

1.1 Performance Environment

The Manufacturing, Engineering and Related Services Sector Education and Training Authority (merSETA) was established in 2000 in terms of the *Skills Development Act No. 97 of 1998*. It is one of 21 Sector Education and Training Authorities (SETAs) that was re-certified on 1 April 2011, by the Minister of Higher Education and Training (MHET), for a period of 5 years ending 31 March 2016. The merSETA licence has been extended for a further 4 years until 31 March 2020. The merSETA is looking beyond the expiry of its licence in March 2020 and is strategically positioning itself for the post-2020 SETA landscape. The merSETA scope of industrial coverage for skills development broadly includes the five chambers: metal and engineering, auto manufacturing, motor retail and component manufacturing, tyre manufacturing and plastics industries.

Using the PESTEL framework, an analysis has been done regarding how the global and local political, economic, social, technological, environmental and legal conditions have played a significant role in shaping the manufacturing, engineering and related services sector in South Africa (SA).

POLITICAL: Political uncertainty in the past few years contributed to slow economic growth and other socio-economic challenges. A significantly improved political environment after the election of President Cyril Ramaphosa as the country's President in December 2017 is projected to have a positive impact on consumer, business and investor confidence. As we draw closer to the 2019 general elections, political uncertainty still has an impact on policy certainty. These conditions amidst political tensions quickly eroded the gains that saw the economy growing by 3.1 % in the last quarter of 2017. During this period, the proportion of manufacturers who indicated that politics is a constraint on doing business in South Africa, increased from 76% to 87% (Grocotts, 2017). Thus, business had to adopt strategies to accommodate the changing economic situation through learning to adapt to such policy environment 'shocks' (Grocotts, 2017).

Trust in public institutions and political leadership has also been eroded by allegations of corruption, state capture and bad governance involving some state entities and senior political leadership.

South Africa's credit rating was downgraded by three rating agencies in 2017, and this was partly due to some of these political risks that threatened economic stability.

ECONOMIC: South Africa has experienced a period of protracted economic weakness, mainly as a result of domestic constraints. This is reflected in low levels of private investment, growing unemployment, and declining real per capita income in recent years (National Treasury, 2018). In the last quarter of 2017, the economy grew by 3.1% however this temporary gain was reversed in the first quarter of 2018 which saw the Gross Domestic Product (GDP) contract by 2.2%, with manufacturing being amongst the largest contributors to the decline. The continued decline of the manufacturing sector is a threat to government's efforts to revitalise the manufacturing sector. The Value-Added Tax (VAT) increase from 14% to 15%, effective 1 April 2018, rising fuel prices and consumer inflation have resulted in a negative economic outlook.

More than two decades after democracy, South Africa's economy remains largely untransformed. Transforming the structure of the economy in terms of control, management and ownership is a key feature of these national policy imperatives such as the Industrial Policy Action Plan (IPAP). In this regard, the South African government has put in place various strategies and programmes such as the black industrialist incentive, localisation and beneficiation as measure for promoting re-industrialisation and job creation.

Opportunities also exist in diversifying the economy, particularly the manufacturing sector by unlocking the circular, blue and green economy in support of a sustainable development agenda and an economy that is more resource efficient. Opportunities for creating jobs exist in the manufacturing sector through recycling and waste beneficiation among other things. The informal sector, cooperatives and the small business sector are also expected to take advantage of the opportunities created by the circular and green economy, such as job creation and community development..

SOCIAL: South Africa remains one of the most unequal societies in the world despite efforts by government to close the inequality gap since the dawn of democracy. This has been worsened by rising unemployment which is currently at 26, 7% (Statistics South Africa, 2018). The manufacturing sector which is one of the largest employers continues to decline and shed jobs. The majority of the jobs lost are semi-skilled and unskilled jobs. According to Statistics South Africa, job losses coupled with the economy's inability to absorb new entrants into the labour market s has also increased youth unemployment to 38, 2%.

Education and training remains a priority for government in its fight against the triple challenges of poverty, unemployment and inequality. The decision by government to implement free University education after a wave of protests in the past three years is expected to benefit learners from disadvantaged backgrounds. However, the sustainability of free education remains uncertain, especially in the prevailing economic conditions. This calls for the need for government, private sector, Higher Education Institutions (HEIs) and other social partners to devise a more sustainable solution.

TECHNOLOGICAL: Technology is set to continue disrupting every sector in the economy. The manufacturing sector is already feeling the impact of the technology driven 4th industrial revolution (4IR) that has not only resulted in changes in business models but also manufacturing processes and the structure of the labour market. Fears of job losses as a result of the rapid adoption of technologies such as Robotics, 3D printing and Artificial Intelligence in production processes cannot be ignored. New job opportunities have however been created in new fields such as innovation management, new product development, big data analytics, Artificial Intelligence and Robotics. This however requires a new breed of a worker, one that is highly skilled and technology savvy.

The risk in the technology driven 4th industrial revolution is not the “robots” replacing workers but the inability of businesses, the Post School Education and Training system (PSET), workers, government and other social partners to respond with appropriate strategies to leverage the benefits and address the challenges. By embracing the 4th industrial revolution, developing countries are projected to leapfrog and compete with advanced manufacturing economies. Developing countries that have embraced the 4th industrial revolution like China in Asia are already reaping the benefits.

The Post- School Education and Training system has a pivotal role to play in preparing the country for the technology driven revolution. This also calls for the need for collaboration between the Post- School Education and Training System, Basic Education, government departments driving economic growth and development strategies, private sector and other social partners in preparing the next generation of workers for the South African economy.

ENVIRONMENTAL: Environmental sustainability has become a topical issue as part of the global economic development agenda. Sustainability is about promoting the responsible use of resources without depleting resources and compromising future generations. The manufacturing sector is one of the major contributors to environmental waste, the depletion of natural resources and climate change.

The “Green Economy” and “Circular Economy” has been identified as a sustainable development imperative with the potential for job creation, new business opportunities and manufacturing opportunities. Some of the merSETA industries are already supporting a low carbon economy through innovative forms of environmental management and proactive clean manufacturing processes. Waste beneficiation, recycling, cleaner production, energy efficiency and resource efficiency are some of the strategies that have been adopted by the manufacturing sector. These strategies are supported by government programmes such as the Resource Efficiency and Cleaner Production (RECP) programme run by the National Cleaner Production Centre of SA (NCPC-SA) supported by the Department of Trade and Industry (DTI).

LEGAL: The South African government has used the legal and policy framework to address the triple challenges of poverty, unemployment and inequality. Moreover, entrenched within South Africa's maturing democracy is the promotion of values espoused in the NDP'S Vision 2030, namely- social cohesion, social justice, just transition and active citizenry, that underpin the transformation agenda as a whole, and have become deeply infused in skills development. Transformative intent and participation in various forums to ensure fair and equitable implementation processes remains essential. One such forum is the Human Resource Development Council (HRDC) Technical Task Team (now The Artisan Development Monitoring and Evaluation Team) that focuses on systemic blockages in artisanal development, where certain sections of the Labour Relations Act (LRA) have been identified as inhibiting access to workplaces and work-integrated learning. Total involvement in the legislative discussions of this nature remains critical.

The current mandate of SETAs is set to end in 2020, after the extension of the National Skills Development Strategy (NSDS) III. The sector also operates within a framework of social and economic legislative framework that impact the sector. Significant legislation worth mentioning includes:

- The Broad-Based Black Economic Empowerment (BBBEE) Act No. 53 of 2003 that is aimed at advancing economic transformation and enhancing the economic participation of black people in the South African economy. Programmes such as the Black Industrialist incentive are a support mechanism for the implementation of the BBBEE Act, which promote structural transformation of the economy through increasing the number of black manufacturers.

Skills development is an important component in the transformation agenda as reflected in the BBBEE Act, and this can be used as a lever for increased skills development in the mer-sector.

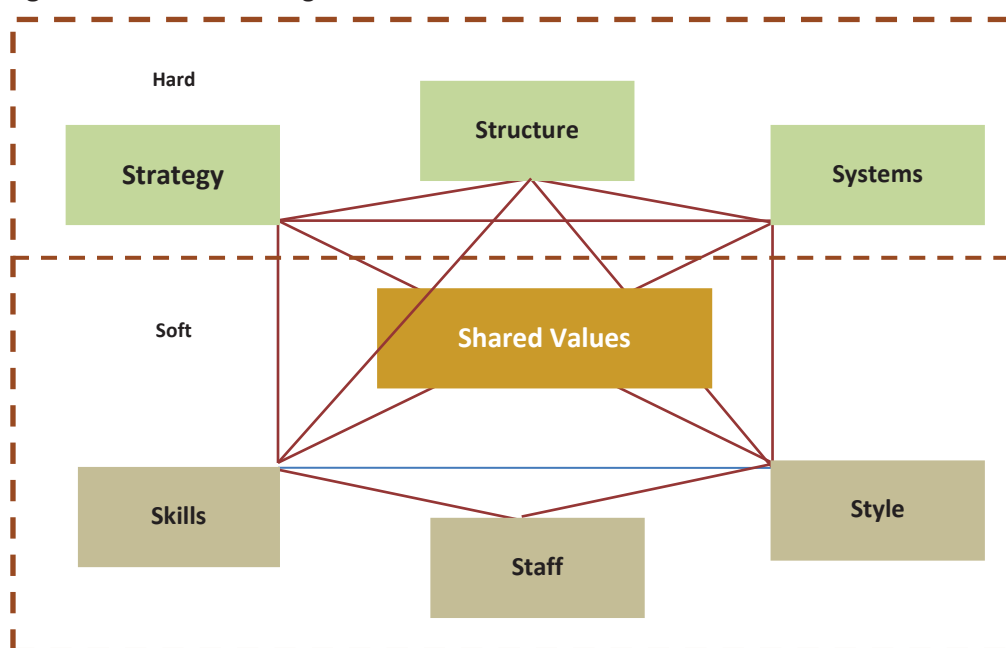
- The Employment Equity (EEA) Act No. 55 of 1998 that is aimed at transforming the race, gender and people with disability makeup of the labour market particularly within the technical, professional and

managerial occupations. Skills development is the main contributor to such transformation. The profile of the manufacturing sector remains untransformed and more needs to be done to achieve the transformation targets (ref. merSETA Sector Skills Plan Update August 2018).

1.2 Organisational Environment

The merSETA organisational environment is analysed in terms of the 7S Framework Model. The 7S Framework divides the seven organisational elements of successful organisations into two categories: “hard” (easy to identify) and “soft” (intangible) elements. These are illustrated below:

Figure1: The merSETA organisational environment



(SHARED VALUES: “We care. We belong. We serve.”)

STRATEGY: The merSETA strategy comprises of four linked components – the Sector Skills Plan (SSP), the 5 year Strategic Plan (SP), the Annual Performance Plan (APP) and the Service Level Agreement (SLA).

The SSP is research based and provides an overview of critical economic, labour market and social drivers, signals and indicators within the merSETA manufacturing economic and government policy environment that impact on skills demand and supply particularly pertaining to skills gaps and skills shortages. The SSP is developed by the merSETA and its three main social partners: employers, labour and government, in order to provide strategic direction for skills development priority actions. Furthermore, the SSP is also an instrument that can provide direction to education and training institutions, skills development providers and other interested

parties with regard to developing relevant education, training and skills development responses for the merSETA manufacturing and engineering environment. The 5 year Strategic Plan is the instrument that the merSETA uses to identify 5 year achievable and realistic targets aligned to its legislated mandate and SSP. These targets are translated into 5 year strategic outcomes oriented goals, budget programme structure aligned to the SETA main areas of service delivery responsibility and strategic objectives that clearly state what the merSETA intends to do or produce to achieve its strategic outcomes oriented goals.

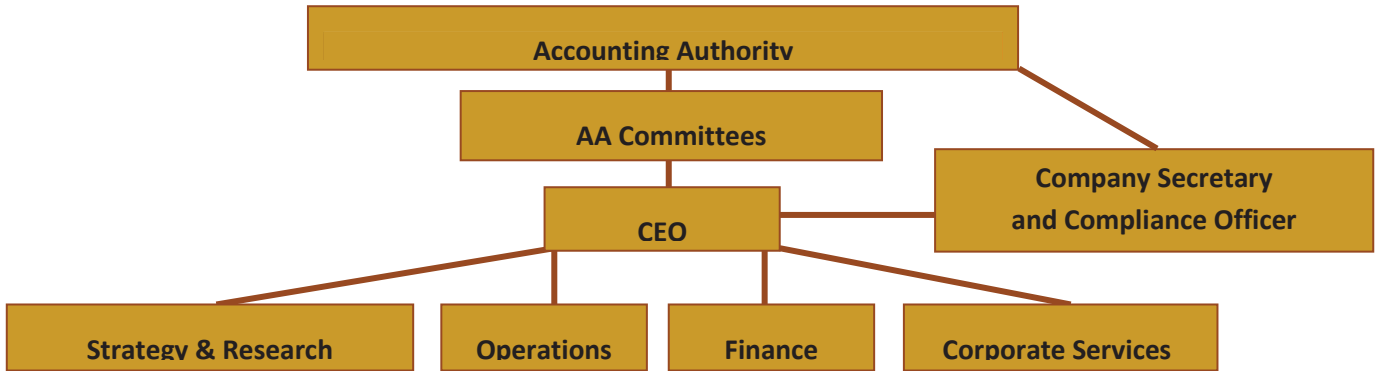
The APP states what the merSETA intends doing in the upcoming financial year and provides a three year Medium Term Expenditure Framework (MTEF) horizon for implementing its Strategic Plan. It sets out performance indicators and targets towards achieving its strategic goals and objectives for its budget programmes. The APP is the basis upon which the SETA, annually, reports to Parliament through the Minister of Higher Education and Training (MHET). The SLA, based on the approved Strategic Plan and APP, is the signed agreement (contract) between the Minister and the merSETA (AA) that sets out the SETA's specific annual obligations and responsibilities, and is the instrument that the Minister and the Department of Higher Education and Training (DHET) utilise to monitor the activities of the merSETA, and the outputs and outcomes thereof. The annual operational plan of the merSETA for all its operational core functions (see Figure 2 below) is determined mainly on the basis of the obligations and responsibilities of the SLA and the APP, with a line of sight to the 5 year Strategic Plan outcomes and SSP priorities.

STRUCTURE: The merSETA is a schedule 3a Public Entity that reports to the MHET as the relevant Executive Authority in terms of the PFMA. The membership of the AA comprises of a Chairperson and 14 members representing stakeholder groups as stipulated in Section 11 of the Skills Development Act (SDA). All members of the AA, inclusive of the Chairperson, are appointed by the Minister of Higher Education and Training, following a public nomination process. The Chairperson is an independent member of the AA as he/she does not represent the stakeholder groups contemplated in Section 11 of the SDA.

The AA is responsible for best practice governance in accordance with King IV principles, the PFMA and the merSETA Constitution, and must ensure that merSETA achieves its mandate as stipulated in the Skills Development Act by reviewing its strategy, and, monitoring performance and compliance to all laws of the Republic of South Africa. The Chief Executive Officer (CEO) is the designated accounting officer of the organisation as delegated by the AA. The CEO is responsible for the execution and operationalisation of the merSETA mandate and strategy, supported by an organisational structure delineating core operational functions (see Figure 2 below). The core operational functions are managed by an executive management team, each

executive manager appointed to manage a core operational function. The Office of the CEO includes the unit for the Company Secretary and Legal Compliance. The diagram below (Figure 2) is the high level depiction of the governance and core divisional structure of the merSETA.

Figure 2: Governance and core functions structure of the merSETA



The following AA committees, through terms of reference are charged with overseeing the governance and strategy of the SETA: Executive Committee; Audit and Risk Committee; Human Resources and Remuneration Committee; Finance and Grants Committee; Governance and Strategy Committee; the five Chamber Committees -Automobile Manufacturing, Metal and Engineering, Retail Motor and Components Manufacturing, New Tyre Manufacturing and Plastics Manufacturing. There are other strategic advisory committees, namely, - Education Training and Quality Assurance (ETQA) Committee and Regional Committees. The current governance and divisional structure has evolved over many years.

Although thus far the governance and divisional structure has responded effectively and efficiently to the SETA’s needs, emerging strategic priorities point to the need to review both governance structures and the organisational structure to determine whether these are still appropriate and relevant.

STAFF: The merSETA staff component totals 227 against a staff establishment of 229 with contracts expiring on 31st March 2020. The current staff complement has adequate skills required for implementing the strategy thus far, and there are operational systems to support strategy implementation. Given the emerging strategic priorities identified by the AA (see section 2.3.2), there is a need for a review of the adequacy of skills and operational systems. Currently, 85% of all positions are filled. For this period a total number of 38 interns are on an internship programme within the organisation in different units.

Table 1: The merSETA staff component as of 30 June 2018

Occupational levels	Male				Female				Foreign Nationals		Totals
	A	C	I	W	A	C	I	W	M	F	
Top management	0	1	0	0	0	0	0	0	0	0	1
Senior management	0	1	0	0	2	0	0	1	0	0	4
Professionally qualified	12	4	1	3	7	4	1	5	2	0	39
Skilled and qualified	31	12	3	9	28	4	1	2	1	0	91
Semi-skilled	27	1	0	1	40	7	0	5	0	0	81
Unskilled	1	0	0	0	9	1	0	0	0	0	11
Total permanent	71	19	4	13	86	16	2	13	3	0	227
Temporary employees	12	0	0	0	26	1	0	0	0	0	38
Grand total	83	19	4	13	112	16	2	13	3	0	265

The merSETA vacancy rate falls within the normal range which is 5.24%. The staff turnover rate fluctuates below 5% which is currently at 4.4%. An average staff tenure of >three years and a staff satisfaction rate of >72% is indicative of employee stability and good practice in Human Resource Management (HRM). In order to ensure a relevant delivery mechanism that is sustainable and aligned to the emerging strategic and operational objectives, the merSETA organisational structure changed to a limited extent in an attempt to capacitate some units within the organisation. Notwithstanding the previous efforts to change the organisational structure, the entire workforce plan is still in need of a review.

STYLE (Governance and Leadership): The Accounting Authority leadership style is consultative, providing opportunities for stakeholder input and endorsement through various committees and stakeholder forums. The Management Committee (MANCO) chaired by the CEO and comprising of the Chief Operations Officer (COO), Chief Financial Officer (CFO), Corporate Services Executive and Strategy and Research Executive, serves as a link between internal core operational functions and the AA and its Committees.

SYSTEMS: The following systems ensure the effective functioning of merSETA:

- **Governance and Management** - The AA is the oversight body for ensuring best practice corporate governance and is responsible for setting strategy for the organisation. In the main, it works within the framework of the Public Finance Management Act (PFMA) and relevant regulations, King IV Principles and the SDA. The roles and responsibilities are delegated to various AA committees and the CEO and his or

her management. However, in terms of the SDA and the PFMA, the AA has final accountability for all merSETA affairs. The merSETA governance and management framework includes the merSETA Constitution, Code of Ethics, AA committees' terms of reference, the Delegation of Authority Framework and strategic and operational policies.

- **Strategy and Performance Management** - The merSETA strategy and performance management system is guided by the PFMA as well as the National Treasury Framework of policies and guidelines for planning and performance management. Planning and target setting is conducted annually based on research, evidence based decision making and annual reports. Performance monitoring and reporting to the DHET takes place on a quarterly basis. In addition, performance monitoring and reporting takes place through internal and external audits, bi-annual budget reviews , as well as regular management meetings and AA (inclusive of its committees) meetings. Process, systems and impact evaluations of the delivery of merSETA skills development programmes and projects are implemented s to continuously inform the merSETA of challenges, successes and impact of skills development delivery for the merSETA sector.
- **Programmes and Projects Implementation** - The programmes and projects implementation system allows for the facilitation and management of skills development initiatives and commitments funded through mandatory and discretionary grants. The system enables the awarding and management of mandatory grants as stipulated by the Grant Regulations. It also enables the strategic disbursement (awarding) and management of discretionary grants for programmes and projects through various forms of agreements including national and international partnerships. These programme and project agreements are the primary vehicle for implementing skills development initiatives and commitments aligned to the merSETA strategic priorities for industry and national growth and development imperatives, and as guided by the National Skills Development Strategy.
- **Quality Assurance** - The quality assurance system is a critical component of programmes and projects implementation. It supports the development, delivery, assessment and certification of qualifications and learning programmes, as delegated by the Quality Council for Trades and Occupations (QCTO), in accordance with its quality assurance policies as well as those of the National Qualifications Framework (NQF).
- **Financial Management** - The financial management system is informed by the PFMA legislation and Treasury Regulations and ensures compliance for implementation of the skills development levy grant

legislation and regulations. Financial management includes compliant administration of the levy administration costs and disbursement of mandatory and discretionary grants, strategic and operational budget planning, monitoring and reporting, management of internal and external audits, and management of procurement and supply chain. There is regular reporting to management, the Accounting Authority and its committees, Treasury and DHET. The merSETA exercises strong fiduciary responsibility, which is evident in the unqualified audit reports received from the Auditor-General of South Africa (AGSA) year-on-year.

- **Human Resource Management** - The human resource management (HRM) system supports the implementation of best practice fair and transparent human resource management with respect to recruitment, selection, talent retention and management, staff performance, staff discipline, staff development, and staff wellness. The merSETA continuously ensures adherence of its HRM to the Republic's Labour laws especially the Employment Equity Act No. 55 of 1998, Labour Relations Act No. 66 of 1995 and Basic Conditions of Employment Act No. 75 of 1997.
- **Marketing and Communication** - The merSETA is responsible for effective and regular communication to all stakeholders inside and outside its designated sector coverage. Communication takes place through multiple channels, including print media; social media; face-to-face engagement such as regular workshops, colloquia, seminars and conferences. In addition, stakeholder representatives meet regularly through various committees, as mentioned above. The merSETA continues to enhance communication to stakeholders through its regional offices in Mpumalanga/Limpopo, Eastern Cape, Free State/Northern Cape, Gauteng North/North West, Gauteng South, KwaZulu-Natal, Western Cape and the Head Office (in Johannesburg). The regional offices service member companies and other implementing stakeholders.
- **Enterprise Content Management** -The notion of enterprise content governance and management has grown out of the need for the SETA to establish a single organisation wide coherent approach and best practice governance and management of its data, records, and knowledge assets. The approach and practice to be developed will apply to the governance structures as well as the units of the four functional divisions depicted above in the functional organisational structure. The aim is to enable access, sharing, integration, preservation and dissemination of merSETA data, records, and knowledge assets. This exercise will turn merSETA into an innovative, learning and knowledge-based organisation, and ensure the retention of institutional memory as the SETA landscape transitions. Compliance to the legal

framework for access to and security of information, and for intellectual property will be of necessity. The Information and Communication Technology (ICT) infrastructure and systems support will be reviewed and aligned accordingly.

- **Information Technology** – Information and Communication Technology is a critical pillar of the merSETA. It is a key enabler of organisational processes supporting organisational performance. The ICT infrastructure, policies, procedures, business processes, systems and structures are in place to support Customer Service, Finance, HR, Marketing and Communication, Skills Planning and Implementation. The merSETA has identified the need to review ICT support and management in order to enhance its business efficiency and effectiveness through best practice automation and electronic business processes.
- **Quality Management** -The merSETA is International Organisation for Standardization (ISO) 9001:2015 certified, and the Quality Management System (QMS) has been successfully implemented. It became effective in August 2009 to date. The merSETA certification was renewed for the third cycle, effective from August 2018 to August 2021. The procedures and processes for the 2018/2019 financial year are currently under review, in order to ensure full alignment of the organisation wide QMS to the ISO 9001:2015 revised standard.

2 REVISION OF LEGISLATIVE AND OTHER MANDATES

The merSETA is a Schedule 3a public entity that is governed by the *Public Finance Management Act No. 1 of 1999 (as amended)*. The entity's mandate is derived from the *Skills Development Act No. 97 of 1998* and its subsequent amendments. The Minister of Higher Education and Training, Dr Blade Nzimande extended the licence of merSETA to 31 March 2020, as per the Government Gazette number 40505 of 15 December 2016.

The mandated responsibilities include the following:

- i. *Develop a Sector Skills Plan (SSP) within the framework of the National Skills Development Strategy (NSDS).*
- ii. *Establish and promote learnerships through:*
 - *Identifying the need for a learnership*
 - *Developing and registering learnerships*
 - *Identifying workplaces for practical work experience*
 - *Supporting the development of learning materials*
 - *Improving the facilitation of learning, and*
 - *Assisting in the conclusion and registration of learnership agreements.*
- iii. *Collect and disburse the skills development levies in its sector; approve workplace skills plans; and allocate grants in the prescribed manner to employers, education and training providers, and workers.*
- iv. *Fulfil the functions of an ETQA, as delegated by the QCTO.*
- v. *Monitoring of education and training in the sector.*

3 OVERVIEW OF BUDGET 2019/20 AND MEDIUM TERM EXPENDITURE FRAMEWORK (MTEF) ESTIMATES

Income and Expenditure Estimates

Table 2: Income and Expenditure Estimates

Programme	Historical			Current Budget	Forecast		
	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
	R000's	R000's	R000's	R000's	R000's	R000's	R000's
Income							
Levies	1 306 676	1 308 132	1 391 470	1 485 301	1 534 095	1 626 141	1 723 709
Penalties and Interest	36 071	27 519	32 742	40 635	34 133	36 181	38 352
Investment Income	102 117	175 628	227 448	264 200	259 904	33 658	332 477
Other Income	224	141	123	220	201	213	226
Government grant income	-	-	-	-	-	-	-
Total Income	1 445 088	1 511 420	1 651 783	1 790 356	1 864 333	1 976 193	2 094 764
EXPENDITURE							
Operational Administration	121 137	138 937	153 191	183 062	192 857	204 428	216 694
QCTO	4 762	7 041	7 468	9 489	9 588	10 163	10 773
Total Administration	125 899	145 978	160 659	192 551	202 445	214 591	227 467
Skills Planning	21 207	20 679	34 355	72 184	115 897	122 850	130 221
Learning Programmes & Projects	882 843	974 486	348 034	1 277 150	1 512 672	1 603 434	1 699 640
Quality Assurance	2 090	1 125	1 1315	13 707	6 366	6 747	7 152
Government grant expenditure	-	-	-	-	-	-	-
Total Expenditure	1 032 719	1 146 744	1 146 883	1 566 095	1 863 371	1 975 173	2 093 683
Net surplus/ (deficit)	412 369	364 676	504 900	22 261	962	1 020	1 081
Accumulated surplus BOY	1 729 155	2 141 524	2 506 200	2 506 200	3 011 100	3 236 323	3 237 343
Accumulated surplus EOY	2 141 524	2 506 200	3 011 100	3 235 361	3 236 323	3 237 343	3 238 424

PART B: PROGRAMME PLANS

4 BUDGET PROGRAMMES: INDICATORS AND TARGETS

4.1 Programme 1: Administration

Programme Purpose

The purpose of this programme is to instil a single coherent best practice effective and efficient governance, leadership and management activities for the AA, its committees, management and staff of the merSETA. This programme relates to achieving best practice governance, leadership and management in accordance with the Public Finance Management Act and Treasury Regulation, King IV Principles, Skills Development Act mandate, the merSETA Constitution and Code of Ethics, AA committees' terms of reference, approved Delegation of Authority Framework, and strategic and operational policies. It is also to achieve:

- (i) Management for planning, budgeting, and performance in accordance with National Treasury Framework of legislation, regulations and guidelines.
- (ii) Management of financial controls and grants disbursements in accordance with the PFMA, Treasury Regulations and Grant Regulations.
- (iii) Operational management systems for implementing incentives, programmes and projects in accordance with internal and external audit requirements and standard operating procedures.
- (iv) Management systems for human, ICT and facilities infrastructure resources.
- (v) Management systems for governance and management of data, records and knowledge assets of the SETA, and
- (vi) Management systems for communication, marketing and information dissemination in accordance with relevant legislation.

The overall intended results must support NSDS III Goal 4.7– “Increasing public sector capacity for improved service delivery and supporting and building of a developmental state.” The evidence of achievements for this programme should manifest in the governance structures functioning in accordance with best practice governance processes, the office of the CEO, and, the functional operations of the CFO, COO, Corporate Service and Strategy and Research complementing the functioning of governance structure by ensuring best practice management for the execution and operationalisation of the AA strategy.

MTEF Programme 1 Performance Indicators, Annual and Quarterly Targets for 2019/20

Table 3: Indicators and targets 2019/20 MTEF

Indicators	Audited/Actual performance			Estimated performance (current year)	Medium-term targets		
	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2020/22
Strategic Objective 1: Effective and efficient governance and leadership practice implemented.							
% of AA and AA committee meetings held as stipulated by the constitution & terms of reference.	New	New	New	New	100%	100%	100%
Number of Governance Charter Reports submitted to DHET.	New	New	New	New	4 Governance Charter Reports submitted to DHET.	4 Governance Charter Reports submitted to DHET.	4 Governance charter reports submitted to DHET.
Strategic Objective 2: Improved financial and corporate management.							
% reduction of internal control deficiencies reported in previous external and internal audit reports.	N/A	N/A	70%	100%	100%	100%	100%
Level of data integrity extracted from the Management Information System (MIS) as defined by the user specification requirements.	N/A	N/A	70%	80%	100%	100%	100%

Indicators	Audited/Actual performance			Estimated performance (current year)	Medium-term targets		
	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2020/22
% of merSETA Workplace Skills Plan (WSP) implemented.	N/A	N/A	72%	70%	80%	80%	80%
Strategic Objective 3: Improved quality of organisational planning, budgeting, performance monitoring and reporting.							
Reliability of reported performance information in alignment with the Annual Performance Plan.	N/A	N/A	100%	100%	100%	100%	100%
Strategic objective 4: Enterprise Content Management (ECM) System for the efficient governance and management of data, records and knowledge assets of the merSETA for all divisions of the merSETA.							
The merSETA Enterprise Content Management system implemented.	N/A	N/A	N/A	Total rating of 2	Approved ECM implementation road map by MANCO.	100% Implementation of Road Map deliverables planned for the year.	100% Implementation of Road Map deliverables planned for the year.

Table 4: Quarterly Targets 2019/20 Programme 1: Administration

Indicators	Reporting period	Annual target	Quarterly targets			
			1 st	2 nd	3 rd	4 th
Strategic objective 1: Effective and efficient governance and leadership practice implemented.						

Indicators	Reporting period	Annual target	Quarterly targets			
			1 st	2 nd	3 rd	4 th
% of scheduled AA and AA committee meetings held.	Quarterly		100%	100%	100%	100%
Number of Governance Charter Reports submitted to DHET.	Quarterly	4 Governance Charter Reports submitted to DHET.	1 Governance Charter Report submitted to DHET.	1 Governance Charter Report submitted to DHET.	1 Governance Charter Report submitted to DHET.	Governance Charter Reports submitted to DHET.
Strategic objective 2: Improved financial and corporate management.						
% reduction of internal control deficiencies reported in previous external and internal audit reports.	Annually	100%	N/A	N/A	N/A	100%
Level of data integrity extracted from the MIS as defined by the user specification requirements.	Annually	100%	N/A	N/A	N/A	100%
% of the merSETA WSP implemented.	Quarterly	80%	10%	20%	20%	30%
Strategic objective 3: Improved quality of organisational planning, budgeting performance monitoring and reporting.						
Reliability of reported performance information in alignment with the Annual Performance Plan.	Quarterly	100%	100%	100%	100%	100%
Strategic objective 4: Enterprise Content Management (ECM) System for the efficient governance and management of data, records and knowledge assets of the merSETA for all divisions of the merSETA.						

Indicators	Reporting period	Annual target	Quarterly targets			
			1 st	2 nd	3 rd	4 th
The merSETA Enterprise Content Management System implemented.	Annually	Approved road map by MANCO.	N/A	N/A	N/A	Approved road map by MANCO.

Table 5: Reconciling Performance Targets with the Budget and MTEF Programme1: Administration

Programme 1: Administration	Historical			Current Budget	Forecast		
	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
	R000's	R000's	R000's	R000's	R000's	R000's	R000's
Compensation	78 074	88 489	92 803	105 958	115 215	122 128	129 455
Depreciation & Amortisation (Capital Expenditure) (CAPEX) related	3 444	2 278	2 239	4 326	4 200	4 452	4 719
Goods & Services	45 050	59 472	67 997	92 354	108 181	114 672	121 552
Direct Project Admin Costs	-	-	-	-	-	-	-
Allocated Project Admin Expenditure	11	215	140	416	840	890	944
% Project Administration Cost	0,0%	0,1%	0,1%	0,2%	0,4%	0,4%	0,4%
TOTAL	126 579	150 454	163 179	203 054	228 436	242 142	256 670

4.2 Programme 2: Skills Planning

Programme Purpose

The purpose of this programme is to establish an effective mechanism for sector skills planning. The functions of this programme encompass research, planning, monitoring and evaluation. It is intended to research

economic, labour market and social drivers, signals and indicators that impact on skills development for the merSETA sector, particularly pertaining to shortages and gaps related to occupations and skills in demand.

The programme is also about the implementation of applied research and innovation projects. These are projects that are about testing and piloting innovations and new ideas, with the intention of taking such projects to scale if successful. The programme also supports the implementation of different types of evaluation studies (drawing on research approaches and methodologies) in order to assess processes, systems and impact of merSETA skills development programmes and projects, to inform the merSETA of its successes and non-achievements, thus influencing ongoing decisions regarding strategic skills development interventions. These different types of research based activities must be assessed in terms of their value to evidence based decisions making capability. Some of the outputs of this programme include research projects conducted, the SSP, established research partnerships to increase the research capability of merSETA, research papers and publications.

Programme 2 MTEF Performance Indicators, Annual and Quarterly Targets for 2019/20

Table 6: Indicators and targets 2019/20 MTEF Programme 2: Skills Planning

Indicators	Audited/Actual performance			Estimated performance (current year)	Medium-term targets		
	2015/16	2016/17	2017/18	2018/19	2019/20	2020/2021	2021/2022
Strategic objective 5: Increased publication of research products that inform cutting edge solutions in the sector.							
Researched SSP approved by the Executive Authority.	N/A	N/A	SSP was accepted and approved by the ministers	SSP that is recorded as accepted and approved by the Executive Authority.	SSP that is recorded as accepted and approved by Executive Authority.	SSP that is recorded as accepted and approved by the Executive Authority.	SSP that is recorded as accepted and approved by the Executive Authority.
Number of primary research studies contained in the research agenda that are implemented.	N/A	N/A	N/A	2 research studies	3 research studies	3 research studies	3 research studies
Number of evaluation studies implemented based on the	N/A	N/A	N/A	5 evaluation studies	5 evaluation projects	5 evaluation projects	3 evaluation projects

Indicators	Audited/Actual performance			Estimated performance (current year)	Medium-term targets		
	2015/16	2016/17	2017/18	2018/19	2019/20	2020/2021	2021/2022
merSETA evaluation plan.							
Number of internal desk-top research projects based on merSETA data tabled at MANCO.	N/A	N/A	N/A	3 internal research projects conducted and results disseminated.	3 internal research projects tabled at MANCO.	3 internal research projects tabled at MANCO.	3 internal research projects tabled at MANCO.

Table 7: Quarterly Targets 2019/20 Programme 2: Skills Planning

Indicators	Reporting period	Annual target	Quarterly targets			
			1 st	2 nd	3 rd	4 th
Strategic objective 5: Increased publication of research products that informs cutting edge solutions in the sector.						
Researched SSP approved by Executive Authority.	Quarterly	SSP that is recorded as accepted and approved by Executive Authority.	First draft of the SSP approved by AA and submitted to DHET by 15 th June.	Final submission of the SSP by 1 st August recorded as accepted and approved by merSETA Accounting Authority.	N/A	SSP approved by Executive Authority.
Number of primary research studies contained in the research agenda that are implemented.	Quarterly	3 research studies	N/A	1 research study	1 research study	1 research study
Number of evaluation studies implemented based on the merSETA evaluation plan.	Quarterly	5 evaluation projects	N/A	2 evaluation studies	2 evaluation studies	1 evaluation study

Indicators	Reporting period	Annual target	Quarterly targets			
			1 st	2 nd	3 rd	4 th
Number of internal desk-top research projects based on merSETA data tabled at MANCO.	Quarterly	3 Research Projects	N/A	1 Research Project	1 Research Project	1 Research Project

Table 8: Reconciling Performance Targets with the Budget and MTEF Programme2: Skills Planning

Programme2: Skills Planning	Historical			Current Budget	Forecast		
	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
	R000's	R000's	R000's	R000's	R000's	R000's	R000's
Compensation	3 746	3 740	5 905	7 447	7 786	8 253	8 748
Depreciation & Amortisation (Capital Expenditure) (CAPEX related)	-	-	-	-	-	-	-
Goods & Services	14 880	14 308	26 578	60 115	103 947	110 184	116 795
Direct Project Admin Costs	1 427	1 730	-	-	-	-	-
Allocated Project Admin Expenditure	1 154	901	1 872	4 622	4 164	4 413	4 678
% Project Administration Cost	12,9%	13,3%	5,8%	6,8%	3,7%	3,7%	3,7%
TOTAL	21 207	20 679	34 355	72 184	115 897	122 850	130 221

4.3 Programme 3: Learning Programmes and Projects

Programme Purpose

The purpose of this programme is to be consistent with NSDS III, by implementing programmes, projects and incentives that will facilitate merSETA to achieve its targets for a skilled workforce. The programmes and projects include partnerships and strategic alliances with not only employers but also post- school public and private education and training institutions, non-levy paying entities, SMEs, cooperatives, labour organisations, NPOs, government departments and public entities, other SETAs, informal sector, and international partners. The range of programmes and projects include those that aim to do the following:

- (i) Re-skills and up-skill those who are currently employed.
- (ii) Skill the unemployed to facilitate entry into the merSETA sector labour market.
- (iii) Increase participation of large, medium and small sized levy paying employers in accessing mandatory grants.

- (iv) Increase capacity of post education and training institutions to deliver skills development for the merSETA sector.
- (v) Increase workplace experiential learning opportunities.
- (vi) Increase support for employers to take on more learners in the workplace.
- (vii) Introduce training within SMEs and for informal entrepreneurs.
- (viii) Address the low level of youth and adult skills and education.
- (ix) Support programmes designed for Adult Education and Training (AET).
- (x) Support learning for needs-specific curricula and content.
- (xi) Implement innovative skills development solutions to address emerging, new complex skills challenges.
- (xii) Increase the capacity of entrepreneurs to enable new ventures into new areas of production activities/growth of existing business.
- (xiii) Support the training layoff scheme.
- (xv) Support retrenchment programmes.

The Grants Policy of the merSETA allows the merSETA to offer a range of incentives that enable optimal participation from various stakeholders and partners. It is through different types of incentives that merSETA will be able to reach its targets for this programme.

The situational analysis in Part A of this Plan indicates that the manufacturing sector globally and locally is undergoing fast and constant technological disruptions. This means that the merSETA has to be flexible in its responses to facilitate, support and incentivise skills development initiatives for its sector. Table 9 indicates the top 10 occupations in demand that are common across all five Chambers, whereas Table 10 indicates occupations in demand per Chamber. However, the occupations in demand listed are not the only skills needs that will be addressed through Programmes 3.

Priority skills needs that are specific to individual industries and other skills will emerge from a variety of sources given the impact of continuous technological disruptions within the manufacturing context.

The main PIVOTAL interventions for the listed in demand occupations will be apprenticeships, learnerships, skills programmes and academic programmes, whilst a few may be addressed through internships and work placements.

Table 9: The merSETA Top 10 Occupations in Demand List/PIVOTAL List (ranked)

OCCUPATION CODE	OCCUPATION IN DEMAND	PIVOTAL INTERVENTIONS PLANNED BY THE SETA	NQF
2017-312201	Production / Operations Supervisor (Manufacturing)	Learnerships and skills programmes	3-4
2017-132102	Production / Operations Manager (Manufacturing)	Bursary and graduate development	6
2017-132102	Automotive Motor Mechanic	Apprenticeship, learnerships and skills programme	2-5
2017-311501	Mechanical Engineering Technician	Apprenticeship, learnerships and skills programme	2-4
2017-432201	Production Coordinator	Learnerships and skills programmes	4-5
2017-653303	Mechanical Fitter	Apprenticeship, learnerships and skills programme	2-4
2017-684905	Vehicle Body Builder	Apprenticeship, learnerships and skills programme	2-4
2017-643202	Vehicle Painter	Apprenticeship, learnerships and skills programme	4
2017-214102	Industrial Engineering Technologist	Bursary and graduate development	6-7
2017-672104	Electronic Equipment Mechanician	Apprenticeship, learnerships and skills programme	4

Source: The merSETA SSP data, 2018

Table 10: The merSETA Sub-Sector Skills Priorities (ranked)

OFO Code	OFO Description	Auto	Metal	Motor	New	Plastic	Intervention	NQF
2017-441903	Program or Project Administrators	X	x				Skills programmes and learnerships	4
2017-653306	Diesel Mechanic		x	x			Apprenticeship, learnership and skills programme	2-5
2017-832901	Metal Engineering Process Worker	X	x				Learnerships and skills programmes	2-5
2017-671101	Electrician	X	x		x		Apprenticeship, learnership and skills programme	2-5

OFO Code	OFO Description	Auto	Metal	Motor	New	Plastic	Intervention	NQF
2017-718905	Automated Machine Operator		x	x			Learnerships and skills programmes	2-5
2017-721901	Product Assembler	X	x			X	Learnerships and skills programmes	2-5
2017-832910	Component Fitter			x	x		Learnerships and skills programmes	2-5
2017-714101	Rubber Production Machine Operator				x	X	Learnerships and skills programmes	2-5
2017-242210	Business Administrator		x		x		Bursary and skills programmes	4-7
2017-334102	Office Administrator		x			X	Bursary, learnerships and skills programmes	3-6
2017-684305	Quality Controller (Manufacturing)		x			X	Apprenticeship, learnership and skills programme	2-5
2017-226302	Safety, Health, Environment and Quality (SHE&Q) Practitioner		x		x		Bursary and skills programmes	4-7
2017-714204	Plastics Production Machine Operator (General)			x		X	Learnerships and skills programmes	2-5
2017-122102	Sales Manager	x		x			Bursary, Learnership, Skills programme	6-9
2017-671202	Millwright	x	x				Apprenticeship, learnership and skills programme	2-5
2017-718304	Packaging Machine Operator			x		X	Learnerships and skills programmes	2-5
2017-311301	Electrical Engineering Technician	x	x				Bursary, learnerships and skills programmes	3-6
2017-214101	Industrial Engineer	x		x			Bursary and skills programmes	4-7
2017-121901	Corporate General Manager		x	x			Bursary, Learnership, Skills programme	6-9

OFO Code	OFO Description	Auto	Metal	Motor	New	Plastic	Intervention	NQF
2017-672105	Instrument Mechanician		x			x	Apprenticeship, learnership and skills programme	2-5
2017-121202	Business Training Manager	x	x				Bursary, Learnership, Skills programme	6-9
2017-721101	Vehicle Assembler	x		x			Learnerships and skills programmes	2-5
2017-684904	Panel beater			x	x		Apprenticeship, learnership and skills programme	2-5
2017-651101	Moulder		x			x	Apprenticeship, learnership and skills programme	2-5
2017-215101	Electrical Engineer	x			x		Bursary and skills programmes	4-7
2017-332301	Retail Buyer	x			x		Bursary, learnerships and skills programmes	3-6
2017-311101	Chemistry Technician		x			x	Bursary, learnerships and skills programmes	3-6
2017-241301	Financial Investment Advisor	x		x			Bursary and skills programmes	4-7
2017-652204	Patternmaker		x			x	Apprenticeship, learnership and skills programme	2-5
2017-214603	Metallurgical Engineer	x		x			Bursary and skills programmes	4-7
2017-653103	Motorcycle Mechanic			x	x		Apprenticeship, learnership and skills programme	2-5
2017-712101	Metal Processing Plant Operator		x				Learnerships and skills programmes	2-5
2017-313901	Automated Assembly Line Operator	x					Bursary, learnerships and skills programmes	3-6
2017-651202	Welder		x				Apprenticeship, learnership and skills programme	2-5
2017-652302	Fitter and Turner		x				Apprenticeship, learnership and skills programme	2-5

OFO Code	OFO Description	Auto	Metal	Motor	New	Plastic	Intervention	NQF
2017-313501	Metal Processing Control Operator		x				Bursary, learnerships and skills programmes	3-6
2017-411101	Administration Clerk / Officer	x	x	x			Skills programmes and learnerships	4
2017-811201	Cleaner (Non-domestic)			x			Learnerships and skills programmes	2-5
2017-651302	Boiler Maker		x				Apprenticeship, learnership and skills programme	2-5
2017-652301	Metal Machinist		x	x		x	Apprenticeship, learnership and skills programme	2-5
2017-542203	Team Leader			x			Skills programmes	4
2017-733201	Truck Driver (General)		x				Learnerships and skills programmes	2-5
2017-734402	Forklift Driver					x	Learnerships and skills programmes	2-5
2017-862202	Handyperson		x				Learnerships and skills programmes	2-5
2017-652201	Press Toolmaker			x			Apprenticeship, learnership and skills programme	2-5
2017-833402	Store Person		x				Learnerships and skills programmes	2-5
2017-833401	Warehouse Worker / Shelves		x				Learnerships and skills programmes	2-5
2017-522302	Motor Vehicle Salesperson			x			Skills programmes	4
2017-252201	IT Information Systems Administrator		x				Bursary and skills programmes	4-7
2017-432101	Stock Clerk / Officer			x		x	Skills programmes and learnerships	4
2017-832902	Plastics Composites and Rubber Factory Worker			x		x	Learnerships and skills programmes	2-5
2017-732101	Delivery Driver				x		Learnerships and skills programmes	2-5
2017-441601	Human Resources Clerk		x				Skills programmes and learnerships	4

OFO Code	OFO Description	Auto	Metal	Motor	New	Plastic	Intervention	NQF
2017-121101	Finance Manager	x					Bursary, Learnership, Skills programme	6-9
2017-862919	Mechanic's Assistant			x			Learnerships and skills programmes	2-5
2017-714201	Plastic Cable making Machine Operator		x				Learnerships and skills programmes	2-5
2017-734301	Crane or Hoist Operator		x				Learnerships and skills programmes	2-5
2017-243301	Technical Service Advisor / Salesman			x			Bursary and skills programmes	4-7
2017-432102	Dispatching and Receiving Clerk / Officer					x	Skills programmes and learnerships	4
2017-671203	Mechatronics Technician	x					Apprenticeship, learnership and skills programme	2-5
2017-713101	Chemical Production Machine Operator			x			Learnerships and skills programmes	2-5
2017-132104	Engineering Manager	x					Bursary, Learnership, Skills programme	6-9
2017-332302	Purchasing Officer			x			Bursary, learnerships and skills programmes	3-6
2017-651301	Sheet Metal Worker		x				Apprenticeship, learnership and skills programme	2-5
2017-311801	Draughtsperson		x				Bursary, learnerships and skills programmes	3-6
2017-311904	Manufacturing Technician					x	Bursary, learnerships and skills programmes	3-6
2017-714208	Plastics Manufacturing Machine Minder					x	Learnerships and skills programmes	2-5
2017-653309	Forklift Mechanic		x				Apprenticeship, learnership and skills programme	2-5

OFO Code	OFO Description	Auto	Metal	Motor	New	Plastic	Intervention	NQF
2017-651501	Rigger		x				Apprenticeship, learnership and skills programme	2-5
2017-242303	Human Resource Advisor	x				x	Bursary and skills programmes	4-7
2017-214401	Mechanical Engineer	x					Bursary and skills programmes	4-7
2017-651401	Metal Fabricator		x				Apprenticeship, learnership and skills programme	2-5
2017-243103	Marketing Practitioner	x					Bursary and skills programmes	4-7
2017-121908	Quality Auditor			x			Bursary, Learnership, Skills programme	6-9
2017-714205	Reinforced Plastic and Composite Production Worker					x	Learnerships and skills programmes	2-5
2017-671208	Transportation Electrician	x					Apprenticeship, learnership and skills programme	2-5
2017-242402	Occupational Instructor / Trainer				x		Bursary and skills programmes	4-7
2017-313916	Manufacturing Production Technicians					x	Bursary, learnerships and skills programmes	3-6
2017-653301	Industrial Machinery Mechanic					x	Apprenticeship, learnership and skills programme	2-5
2017-653307	Heavy Equipment Mechanic		x				Apprenticeship, learnership and skills programme	2-5
2017-651402	Structural Steel Erector		x				Apprenticeship, learnership and skills programme	2-5
2017-214501	Chemical Engineer					x	Bursary and skills programmes	4-7
2017-351302	Geographic Information Systems Technicians	x					Bursary, learnerships and skills programmes	3-6
2017-661101	Precision Instrument Maker and Repairer		x				Apprenticeship, learnership and skills programme	2-5

OFO Code	OFO Description	Auto	Metal	Motor	New	Plastic	Intervention	NQF
2017-311201	Civil Engineering Technician		x				Bursary, learnerships and skills programmes	3-6
2017-642702	Refrigeration Mechanic		x				Apprenticeship, learnership and skills programme	2-5
2017-712102	Metal Manufacturing Machine Setter and Minder		x				Learnerships and skills programmes	2-5
2017-214104	Production Engineering Technologist				x		Bursary and skills programmes	4-7
2017-671207	Armature Winder		x				Apprenticeship, learnership and skills programme	2-5
2017-111402	Shop Steward	x					Bursary, Learnership, Skills programme	6-9
2017-714203	Plastics Fabricator or Welder					x	Learnerships and skills programmes	2-5
2017-652401	Metal Polisher		x				Apprenticeship, learnership and skills programme	2-5
2017-653304	Diesel Fitter		x				Apprenticeship, learnership and skills programme	2-5
2017-714207	Thermoforming Machine Operator					x	Learnerships and skills programmes	2-5
2017-214605	Metallurgist			x			Bursary and skills programmes	4-7
2017-671204	Lift Mechanic		x				Apprenticeship, learnership and skills programme	2-5
2017-714209	Reinforced Plastics and Composite Trades Worker					x	Learnerships and skills programmes	2-5
2017-265405	Technical Director					x	Bursary and skills programmes	4-7
2017-641303	Refractory Mason		x				Apprenticeship, learnership and skills programme	2-5

OFO Code	OFO Description	Auto	Metal	Motor	New	Plastic	Intervention	NQF
2017-661103	Scale Fitter		x				Apprenticeship, learnership and skills programme	2-5
2017-671206	Electrical Equipment Mechanic		x				Apprenticeship, learnership and skills programme	2-5

(Source: The merSETA SSP, 2018)

Programme 3 MTEF Performance Indicators, Annual and Quarterly Targets for 2019/20

Table 11: Indicators and targets 2019/20 MTEF Programme 3: Learning Programmes and Projects

Indicators	Audited/Actual performance			Estimated performance (current year)	Medium-term targets		
	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Strategic objective 6: Increased contribution to employment and growth opportunities through skills facilitation.							
Number of unemployed learners entering learnerships.	4 202	1 579	4 665	1 382	2 500	2 625	2 756
Number of unemployed learners completing learnerships.	2 302	1 207	2 804	1 523	3 000	3 150	3 308
Number of employed learners entering Learnerships	4 256	1 360	2 634	1 410	1 900	1 995	2 095
Number of employed learners completing learnerships.	1 847	990	1 846	2 768	3 230	3 392	3561
Number of unemployed	275	385	554	336 ¹	400	467	486

¹ This is the target with additional 130

Indicators	Audited/Actual performance			Estimated performance (current year)	Medium-term targets		
	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
graduates placed on internships (Entered).							
Number of unemployed graduates placed on internships (Completed).	197	90	399	200	250	263	276
Number of TVET students placed for work experience (Entered).	616	272	N/A	1 500	3 000	3 150	3 308
Number of TVET students placed work experience (Completed).	191	37	N/A	700	700	735	772
Number of graduates who entered candidacy programmes.	N/A	0	N/A	20	20	21	22
Number of graduates who completed candidacy programmes.	N/A	0	N/A	3	20	21	22
Number of unemployed learners entering skills programmes.	4 467	2 167	4 176	1 929	4 000	4 200	4 410
Number of unemployed learners completing skills programmes.	2 329	1 016	1 633	1 172	2 633	2 764	2 903
Number of employed learners entering skills programmes.	4 622	2 522	4 320	3 583	4000	4 200	4 410
Number of employed learners completing skills programmes.	1 739	1 206	1 819	3 014	3 100	3 255	3 418
Number of employed learners on bursaries (Entered).	243	425	309	123	98	103	108
Number of employed learners on bursaries (Completed).	92	160	171	261	97	101	106

Indicators	Audited/Actual performance			Estimated performance (current year)	Medium-term targets		
	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Number of unemployed learners on bursaries (Entered).	1 770	346	401	170	475	498	523
Number of unemployed learners on bursaries (completed).	25	163	16	13	475	498	523
Number of learners entered for artisan trade qualifications.	1 330	2732	4 221	3 969	4 366	4 584	4 813
Number of learners completing artisan trade qualifications.	3 227	1565	2 819	5 000	3 400	3 570	3 749
Number of candidates completing Recognition of Prior Learning (RPL).	2 577	317	2 495	1 250	1 500	1 575	1 658
Number of learners accessing and completing AET programmes (Entered).	710	448	1 210	500	600	630	662
Number of learners accessing and completing AET programmes (Completion).	462	388	1 166	381	400	420	441
Number of companies being paid mandatory grants: large (150+ employees).	580	540	509	500	500	525	551
Number of companies being paid mandatory grants: medium (50 – 149 employees).	100	926	853	833	833	875	918
Number of companies being paid mandatory grants: small (49 and less employees).	2 071	2 171	2 111	2 135	2 135	2 242	2 353

Indicators	Audited/Actual performance			Estimated performance (current year)	Medium-term targets		
	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Strategic objective 7: Strengthen partnerships for improved responsiveness to the needs of the sector.							
Number of students accessing WIL to achieve the national diploma (Entered).	879	656	642	421	325	341	358
Number of students accessing WIL to achieve the national diploma (Completion).	697	257	366	359	325	341	358
Number of new TVET college partnerships established.	34	14	8	8	8	9	10
Number of new SETA / HEI partnerships established.	13	6	2	5	6	7	8
Number of SETA / employer partnerships established.	2 320	1 696	1 786	1 559	1 600	1 680	1 764
Number of lecturers developed (Entered).	163	60	116	25	50	52	54
Number of lecturers developed (completed).	151	52	9	25	50	52	54
Number of new SETA/government partnerships established.	N/A	N/A	0	3	2	2	2
Strategic objective 8: Improved competency levels of Small and Medium Enterprises (SMEs), township and village enterprises and co-operatives entrepreneurs.							
Number of co-operatives supported through skills development.	35	36	17	10	20	20	21
Number of small businesses supported through skills development.	1 851	1 894	1 651	500	1 500	1 500	1 575

Indicators	Audited/Actual performance			Estimated performance (current year)	Medium-term targets		
	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Number of Non-Profit Organisations (NPOs) supported through skills development (NGOs{7} and registered Community Based Organisations (CBOs {5}))	30	35	27	12	12	13	14
Number of NLPes supported through skills development.	271	258	213	50	200	210	220
Number of trade unions supported through skills development.	5	4	4	4	4	4	4
Number of rural development projects supported through skills development.	15	13	4	4	4	4	4

Table 12: Quarterly Targets 2019/20 Programme3: Learning Programmes and Projects

Indicators	Reportin g period	Annual target- 19/20	Quarterly targets			
			1 st	2 nd	3 rd	4 th
Strategic objective 6: Increased contribution to employment and growth opportunities through skills facilitation.						
Number of unemployed learners entering learnerships.	Quarterly	2500	625	625	625	625
Number of unemployed learners completing learnerships.	Quarterly	3000	750	750	750	750
Number of employed learners entering learnerships.	Quarterly	1900	475	475	475	475
Number of employed learners completing learnerships.	Quarterly	3 230	807	807	807	809
Number of unemployed graduates placed in internships (Entered).	Quarterly	400	100	100	100	100

Indicators	Reportin g period	Annual target- 19/20	Quarterly targets			
			1 st	2 nd	3 rd	4 th
Number of unemployed graduates placed in internships (Completed).	Quarterly	250	0	0	125	125
Number of TVET students placed at companies for work experience (entered).	Quarterly	3 000	750	750	750	750
Number of TVET students placed at companies for work experience (completed).	Quarterly	700	175	175	175	175
Number of engineering graduates who entered candidacy programmes.	Quarterly	20	5	5	5	5
Number of engineering graduates who completed candidacy programmes.	Quarterly	20	5	5	5	5
Number of unemployed learners entering skills programmes.	Quarterly	4 000	1 000	1 000	1 000	1 000
Number of unemployed learners completing skills programmes.	Quarterly	2633	658	658	658	659
Number of employed learners entering skills programmes.	Quarterly	4 000	1 000	1 000	1 000	1 000
Number of employed learners completing skills programmes.	Quarterly	3 100	775	775	775	775
Number of employed learners on bursaries (Entered).	Quarterly	98	20	30	20	28
Number of employed learners on bursaries (completed).	Quarterly	97	0	0	0	97
Number of unemployed learners on bursaries (Entered).	Quarterly	475	118	118	118	121
Number of unemployed learners on bursaries (Completed).	Quarterly	475	0	0	237	238
Number of learners entered for artisan trade qualifications	Quarterly	4 366	1 091	1 091	1 091	1 093

Indicators	Reportin g period	Annual target- 19/20	Quarterly targets			
			1 st	2 nd	3 rd	4 th
Number of learners completing artisan trade qualifications.	Quarterly	3 400	850	850	850	850
Number of candidates accessing recognition of prior learning (RPL).	Quarterly	1 500	375	375	375	375
Number of learners accessing AET programmes (Entered).	Quarterly	600	150	150	150	150
Number of learners accessing AET programmes (Completed).	Quarterly	400	100	100	100	100
Number of companies being paid a mandatory grant: large.	Quarterly	500	0	0	250	250
Number of companies being paid a mandatory grant: medium.	Quarterly	833	0	0	416	417
Number of companies being paid a mandatory grant: small.	Quarterly	2 135	0	0	1 067	1 068
Strategic objective 7: Strengthened partnerships for improved responsiveness to the needs of the sector.						
Number of students accessing WIL to achieve the National Diploma (Entered).	Quarterly	325	81	81	81	82
Number of students accessing WIL to achieve the National Diploma (Completed).	Quarterly	325	0	0	163	163
Number of new TVET college partnerships established.	Annually	8	0	0	0	8
Number of new SETA / HEI partnerships established.	Annually	6	0	0	0	6
Number of SETA / employer partnerships established.	Quarterly	1 600	0	0	800	800

Indicators	Reportin g period	Annual target- 19/20	Quarterly targets			
			1 st	2 nd	3 rd	4 th
Number of lecturers developed (Entered).	Quarterly	50	10	10	10	20
Number of lecturers developed (Completed).	Quarterly	50	0	0	25	25
Number of new SETA /government partnerships established.	Annually	2	0	0	0	2
Strategic objective 8: Improved competency levels of SMEs, township and village enterprises and co-operatives entrepreneurs.						
Number of co-operatives supported through skills development.	Quarterly	20	0	0	10	10
Number of small businesses supported through skills development.	Quarterly	1 500	375	375	375	375
Number of NPOs supported through skills development (NGO {7}) and registered CBOs (5).	Quarterly	12	0	0	0	12
Number of NLPEs supported through skills development.	Quarterly	200	50	50	50	50
Number of trade unions supported through skills development.	Annually	4	0	0	0	4
Number of rural projects supported through skills development.	Annually	4	0	0	0	4

Table 13: Reconciling Performance Targets with the Budget and MTEF Programme3: Learning Programmes and Projects

Programme 3: Learning Programmes & Projects	Historical			Current budget	Forecast		
	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
	R000's	R000's	R000's	R000's	R000's	R000's	R000's
Compensation	4 197	3 629	1187	4 046	2 803	2 971	3 150
Depreciation & Amortisation (Capital Expenditure) (CAPEX related)	1 472	481	948	948	632	670	710
Goods & Services	841 312	938 478	908 224	1 234 428	1 469 927	1 558 124	1 651 611

Direct Project Admin Costs	7	37	51	-	-	-	-
Allocated Project Admin Expenditure	35 855	31 861	37 624	37 728	39 310	41 669	44 169
% Project Administration Cost	4,2%	3,4%	4,1%	3,0%	2,7%	2,7%	2,7%
TOTAL	882 843	974 486	978 034	1 277 150	1 512 672	1 603 434	1 699 640

4.4 Programme 4: Quality Assurance

Programme Purpose

The purpose of the quality assurance programme is to develop, implement and monitor qualifications and part qualifications and the learning programmes thereof (learnerships, apprenticeships, skills programmes, skills sets, etc.). Quality assurance further ensures that national standards for quality delivery are acceptable through proper accreditation of skills development institutions and providers, monitoring and auditing of delivery, rewarding of successful learners with valid industry accepted certification and constantly reviewing the quality cycle, in order to ensure continuous improvement.

This programme is also a key area for curriculum research, innovation and development for emerging occupations and skills needed for the development, expansion and diversification of the mer manufacturing industries. It has to address the development of the merSETA delivery system (learning programmes and materials, institutions, skills development providers, workplace trainers and mentors, assessors and moderators) to align to emerging and future skills requirements, and draw on innovative learning, assessment and certification methodologies.

The quality assurance functions are executed as a delegated function by the QCTO, either as a Development Quality Partner (DQP) or Assessment Quality Partner (AQP). These delegated functions include the development of curricula for occupational qualifications or part qualifications, support for the accreditation and quality management of providers, the registration of assessors and moderators supporting assessment and moderation processes, including the certification of learners as proof of successful completion of qualifications within the mer-sector.

The merSETA is committed to building self-directed career and vocational guidance. The purpose of this programme is also to position the manufacturing, engineering and related services industry as providing attractive pathways for personal and career development to young people and workers. The merSETA has initiated a number of partnerships with various institutions, which focus on innovative career development initiatives. The priorities for the next period are to increase the number of career guidance practitioners in

technology-focused institutions, entrench the international World Skills competition in the South African apprenticeship and artisan development landscape, and provide career development to workers through career path mapping and advice.

Programme 4 MTEF Performance Indicators and Annual and Quarterly targets for 2019/20

Table 14: Indicators and targets 2019/20 MTEF Programme4: Quality Assurance

Indicators	Audited/Actual performance			Estimated performance (current year)	Medium-term targets		
	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Strategic objective 9: Increased responsiveness to the mer-sector, through the provision of sector endorsed occupational qualifications and part qualifications.							
Number of mer-sector occupational qualifications developed.	N/A	N/A	Project completed as planned	10	10	11	12
Strategic objective 10: Increased throughput of learners in occupational programmes through a strengthened merSETA quality assurance system.							
Percentage of providers implementing merSETA occupational qualifications monitored.	N/A	N/A	70%	50%	70%	70%	70%
Strategic Objective 11							
Diversified career development, advice and guidance.							
Number of career awareness events implemented/in which merSETA participated.	27	43	67	30	50	52	53
Number of innovation projects implemented.	N/A	N/A	N/A	3	3	1	1

Table 15: Quarterly Targets 2019/20 Programme4: Quality Assurance

Indicators	Reporting period	Annual target 19/20	Quarterly targets			
			1 st	2 nd	3 rd	4 th
Strategic objective 9: Increased responsiveness to the mer-sector with the provision of sector-endorsed occupational qualifications and part qualifications.						
Number mer-sector occupational qualifications developed.	Annually	10	N/A	N/A	N/A	10

Indicators	Reporting period	Annual target 19/20	Quarterly targets			
			1 st	2 nd	3 rd	4 th
Strategic objective 10: Increased throughput of learners in occupational programmes through a strengthened merSETA quality assurance system.						
Percentage of accredited providers and approved workplaces implementing merSETA occupational qualifications monitored.	Quarterly	75%	0	25%	25%	25%
Strategic Objective 11						
Diversified career development, advice and guidance.						
Number of career awareness events implemented/in which merSETA participated.	Quarterly	50	12	12	12	14
Number of innovation projects implemented.	Annual	3	N/A	N/A	N/A	3

Table 16: Reconciling Performance Targets with the Budget and MTEF Programme 4: Quality Assurance

Programme 4: Quality Assurance	Historical			Current Budget	Forecast		
	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
	R000's	R000's	R000's	R000's	R000's	R000's	R000's
Compensation	-	-	-	-	-	-	-
Depreciation & Amortisation (Capital Expenditure) (CAPEX related)	-	-	-	-	-	-	-
Goods & Services	1 976	1 076	1 243	13 164	6 160	6 529	6 921
Direct Project Admin Costs	-	-	0	0	0	-	-
Allocated Project Admin Expenditure	114	49	72	543	206	218	231
% Project Administration Cost	5,8%	4,6%	5,8%	4,1%	3,3%	3,3%	3,3%
TOTAL	2 090	1 125	1 315	13 707	6 366	6 747	7 152

PART C: LINKS TO OTHER PLANS

5 LINKS TO INFRASTRUCTURE AND OTHER CAPITAL PLANS

n/a

6 CONDITIONAL GRANTS

n/a

7 PUBLIC ENTITIES

n/a

8 PUBLIC – PRIVATE PARTNERSHIPS

n/a

9 ANNEXURE A: AMENDMENTS RELATING TO THE STRATEGIC PLAN FOR 2015/16 TO 2019/20

The merSETA has four budget programmes implemented in the 2019/20 reporting period, in maintaining standardisation with the National Treasury as well as the DHET directive regarding the number of budget programmes for SETAs. The Strategic Plan has been amended to include an additional strategic objective for Programme 1: Administration and an additional Strategic Objective for Programme 4: Quality Assurance.

10 ANNEXURE B: TECHNICAL INDICATOR DESCRIPTIONS (TID)

10.1 Programme 1: Administration

Table 17: Programme 1: Administration Indicators

Indicator title	% of AA and AA committees' meetings held as stipulated by the Constitution and terms of reference.
Short definition	This indicator refers to the number of AA and its committees' meetings held against the constitutionally stipulated meetings and terms of reference for the AA and each of its committees.
Purpose/importance	The purpose of this indicator is to monitor the level of compliance by the AA and its committees against the constitutional stipulation and terms of reference with regard to the number of meetings, as a means of determining commitment to governance and oversight roles and responsibilities.
Source/collection of data	Minutes signed off by the AA Chairperson and Committee Chairpersons, attendance registers.
Method of calculation	Total number of AA and Committee meetings held divided by the total number of AA and committee meetings stipulated in the constitution multiplied by 100.
Data limitations	None
Type of indicator	Output
Calculation type	Non-cumulative
Reporting cycle	Quarterly
New indicator	New
Desired performance	100%
Indicator responsibility	Company Secretary and Compliance Officer

Indicator title	Number of governance charter reports submitted to DHET.
Short definition	This indicator refers to the number of governance and leadership reports submitted to DHET.
Purpose/importance	The purpose of this indicator is to monitor the adherence of the governance and leadership structures, in addressing king IV principles through the interventions implemented to ensure adherence.

Source/collection of data	Governance charter report; King IV checklist report; AA and committees' evaluation/self-assessment reports.
Method of calculation	Count the number of governance charter reports submitted to DHET.
Data limitations	None
Type of indicator	Output
Calculation type	Non-cumulative
Reporting cycle	Quarterly
New indicator	New
Desired performance	Four governance charter reports addressing king IV principles.
Indicator responsibility	Company Secretary and Compliance Officer

Indicator title	% Reduction of internal control deficiencies reported in previous external and internal audit reports.
Short definition	This indicator measures the extent to which the internal control weaknesses, which were identified in the 2018/19 external and internal audit reports, have been resolved.
Purpose/importance	The purpose of this indicator is to monitor remedial actions that will be taken to address the findings, so that merSETA improves its internal controls and processes, thereby ensuring compliance with all related regulations, successful delivery of the SETA mandate, and accurate reporting.
Source/collection of data	Internal audit log, follow-up reviews conducted by internal and external auditors, QS reports.
Method of calculation	Total number of previous findings addressed in the year under review, divided by the total number of issues identified in the previous year.
Data limitations	None
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Annual
New indicator	No
Desired performance	100%

Indicator title	% Reduction of internal control deficiencies reported in previous external and internal audit reports.
Indicator responsibility	Chief Financial Officer

Indicator title	Level of data integrity extracted from the MIS as defined by the user specification requirements.
Short definition	This indicator measures the accuracy, completeness and consistency of data extracted from the MIS, as defined by the user's specific requirements document. (Integrity referring to accuracy, correctness and consistency).
Purpose/importance	To monitor the level of accuracy of system generated data for accurate and consistent reporting.
Source/collection of data	User specification requirements documents against the system generated reports, validation reports.
Method of calculation	Validation reports (system generated report compared with user requirements document).
Data limitations	None
Type of indicator	Output
Calculation type	Non-Cumulative
Reporting cycle	Quarterly
New indicator	Yes
Desired performance	Accurate, complete and consistent data reports. 100%.
Indicator responsibility	Chief Financial Officer

Indicator title	% of the merSETA Workplace Skills Plan (WSP) implemented.
Short definition	This indicator measures the implementation of planned training and staff development interventions indicated in the WSP - which, at a minimum will refer to qualifications, part qualifications, skills programmes, short courses, seminars, conferences, workshops, coaching and mentoring initiatives - and which are aimed at up-skilling and re-skilling staff, in order to increase their competence, so that the organisation can execute its mandate.
Purpose/importance	To monitor the implementation of the merSETA workplace skills plan.

Indicator title	% of the merSETA Workplace Skills Plan (WSP) implemented.
Source/collection of data	Personal Development Plans (PDPs), WSP, Annual Training Report (ATR).
Method of calculation	The number of staff development interventions (persons) implemented, divided by the total number of staff development interventions planned, multiplied by 100.
Data limitations	None
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	80%
Indicator responsibility	Corporate Services Executive

Indicator title	Reliability of reported performance data in alignment with the Annual Performance Plan.
Short definition	This indicator measures the reliability of data for reporting alignment to the Annual Performance Plan, reliability being valid, accurate and complete.
Purpose/importance	The purpose is to monitor that the merSETA data and records management process results in capturing, collecting and storing information that is verifiable, and that validates reported performance accurately, consistently and in alignment with the Annual Performance Plan.
Source/collection of data	Monitoring and Evaluation (M&E) unit validation reports. Internal Audit Reports, DHET validation reports
Method of calculation	Total number of findings from the sampled indicator divided by the total number of sampled units, multiply by 100 minus the error rates percentage calculated from 100%.
Data limitations	None
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New Indicator	No

Indicator title	Reliability of reported performance data in alignment with the Annual Performance Plan.
Desired performance	100%
Indicator responsibility	Strategy and Research Executive

Indicator title	The merSETA Enterprise Content Management (ECM) system implemented.
Short definition	This indicator measures progress in the development and implementation of good practice enterprise content management. (Enterprise content management is a combination of strategies, methods, and tools for harnessing, capturing, managing, storing, preserving, and disseminating records, data, information and knowledge supporting all organisational processes through their entire lifecycle, and affects all divisions and their units).
Purpose/importance	To monitor implementation of enterprise content management aimed at improving the management and governance of records, data, information, knowledge, (enterprise content management) generated by the merSETA, in order to improve efficiency in the governance, strategic management and operations.
Source/collection of data	The ECM approved strategy, approved implementation plan and maturity assessment report, implementation roadmap.
Method of calculation	Approved ECM road map by MANCO.
Data limitations	None
Type of indicator	Output
Calculation type	Non-cumulative
Reporting cycle	Annually
New indicator	No
Desired performance	Approved road map by MANCO.
Indicator responsibility	Strategy and Research Executive

10.2 Programme 2: Skills Planning

Table 18: Programme 2: Skills Planning Indicators

Indicator title	Researched Sector Skills Plan (SSP) approved by the Executive Authority.
Short definition	This indicator ensures the quality of the SSP- the ultimate criteria being its acceptance and approval by the Executive Authority, based on the recommendations by the Governance and Strategy (G & S), and AA.
Purpose/importance	The main purpose of the indicator is to measure the quality of the SSP such that it adheres to the research standards required by stakeholders, and the requirements of the DHET SSP Framework, and it informs decisions with regard to the strategic, annual performance and operational plans.
Source/collection of data	DHET SSP Assessment Report, record of AA and G & S Committee recommendations, Executive Authority approval letter.
Method of calculation	Executive Authority approval letter.
Data limitations	None
Type of indicator	Output
Calculation type	Non-cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	Approved SSP by the Executive Authority.
Indicator responsibility	Strategy and Research Executive

Indicator title	Number of primary research studies contained in the research agenda that are implemented.
Short definition	This indicator refers to primary research projects, including applied research conducted to enhance strategic decision making, provide leadership in the sector with respect to innovations and enhanced understanding in the skills development arena.
Purpose/importance	The purpose is to monitor that planned research is implemented or conducted so that the research results assist management and the AA in making decisions based on empirical evidence, that will influence the types of skills development interventions to be implemented within the merSETA scope of coverage.
Source/collection of data	Research agenda and research reports (both progress reports and final reports).

Indicator title	Number of primary research studies contained in the research agenda that are implemented.
Method of calculation	Count the number of research studies that are implemented.
Data limitations	Unreliable data base, low participation by the required respondents, no access to relevant primary data from employer, union and government stakeholders.
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	Three primary research projects for 2019/20.
Indicator responsibility	Strategy and Research Executive

Indicator title	Number of evaluation studies implemented based on the merSETA evaluation plan.
Short definition	This indicator refers to the number of evaluation research studies contained in the approved evaluation plan, that are implemented. The merSETA definition of evaluation covers the evaluation of systems and processes, as well as the evaluation of impact. The evaluation of systems and processes talks to whether or not the organisation is doing the right things the right way. Impact evaluation talks to measuring whether or not beneficiaries are changing and improving their skills for employment opportunities, and whether or not companies and industries are reaping the benefits of skilled people with regard to growth and improved productivity.
Purpose/importance	The purpose of the indicator is to monitor the implementation of evaluation research studies contained in the merSETA evaluation plan. Research and evaluation are important for supporting decision making and planning for the successful execution of the SETA's mandate.
Source/collection of data	The evaluation plan for 2019 to 2020, scoping documents, terms of reference, progress reports and evaluation study reports.
Method of calculation	Count the number of evaluation studies that are implemented.
Data limitations	Evaluation research studies that are not implemented due to delays in the procurement of research service providers, low participation by the required respondents, no access to stakeholders and partners that participated in the implementation of the merSETA interventions/initiatives.
Type of indicator	Output

Indicator title	Number of evaluation studies implemented based on the merSETA evaluation plan.
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	5 evaluation research studies implemented for 2019/20.
Indicator responsibility	Strategy and Research Executive

Indicator title	Number of internal desk-top research projects based on merSETA data tabled at MANCO.
Short definition	This indicator refers to internal desk-top research projects that are conducted through the analysis of data in the merSETA Management Information System (MIS), in order to enhance internal decision making with regard to ongoing delivery of merSETA interventions.
Purpose/importance	The purpose is to monitor the projects conducted that assist management in making decisions on the types of skills development interventions to implement for merSETA stakeholders, based on empirical evidence.
Source/collection of data	Research questions, research reports.
Method of calculation	Count the number of internal desk-top research studies tabled at MANCO.
Data limitations	Accuracy of the merSETA data, poorly constructed analysis tools.
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	Yes
Desired performance	Three internal desk-top research projects for 2019/20.
Indicator responsibility	Strategy and Research Executive

10.3 Programme 3: Learning Programmes and Projects

Table 19: Programme 3: Learning Programmes and Projects Indicators

Indicator title	Number of unemployed learners entering learnership programmes.
Short definition	Number of unemployed learners registered to enter learnership programmes that are funded as per the merSETA funding model and the merSETA Grants Policy, and those provided with non-monetary administrative support linked to merSETA qualifications, part qualifications and skills programmes.
Purpose/importance	To monitor the number of learners registered to enter learnership programmes that address scarce skills in the following occupations: Production / Operations Supervisor (Manufacturing), Production / Operations Manager (Manufacturing), Automotive Motor Mechanic, Production Coordinator, Mechanical Fitter, Vehicle Body Builder, Vehicle Painter, Industrial Engineering Technologist, Electronic Equipment Mechanician and any other skills that stakeholders determine as needed, but are not included in the top 10 list.
Source/collection of data	Learnership agreement, contract of employment or letter of confirmation of employment status for the duration of the learning programme, certified copy of ID or passport, confirmation of application of ID or foreign identification document (i.e. any one of the listed documents), certified copy of highest qualification or affidavit, confirmation of the training provider's accreditation for the specific learnership programme recorded on the merSETA MIS system.
Method of calculation	Count the number of learners registered on the MIS where there is verifiable evidence, as listed above, and verified through the manual spreadsheet template.
Data limitations	Evidence documents required to capture learners not availed to merSETA in time for capturing and reporting within the relevant reporting period.
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, at least 2500 learners will enter learnerships (supported by a range of monetary incentives and administrative systems).
Indicator responsibility	Chief Operations Officer

Indicator title	Number of unemployed learners completing a learnership.
Short definition	Number of unemployed learners successfully completing a registered learnership programme that is funded as per the merSETA funding model, and the merSETA Grants Policy.
Purpose/importance	To monitor learners who complete learnership programmes that address scarce skills in the following occupations: Production / Operations Supervisor (Manufacturing), Production / Operations Manager (Manufacturing), Automotive Motor Mechanic, Production Coordinator, Mechanical Fitter, Vehicle Body Builder, Vehicle Painter, Industrial Engineering Technologist, Electronic Equipment Mechanician, and any other skills that stakeholders determine as needed but are not included in the top 10 list.
Source/collection of data	Learnership agreement, contract of employment or letter of confirmation of employment status for the duration of the learning programme, certified copy of ID or passport, confirmation of application of ID or foreign identification document (i.e. any one of the listed documents), certified copy of highest qualification or affidavits, confirmation of the training provider's accreditation for the specific learnership programme on the merSETA MIS system, copy of the moderation or assessment report, statement of results, a copy of the certificate or data of certified learners on the merSETA MIS system (i.e. any one of the listed evidence requirements).
Method of calculation	Count the number of learners who completed the learnership programme and are certified on the MIS, where there is verifiable evidence, as listed above, and verified through the manual spreadsheet template.
Data limitations	Evidence documents required to capture learners not availed to merSETA in time for capturing and reporting within the relevant reporting period.
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, at least 3000 learners having completed learnerships (supported by a range of monetary incentives and administrative systems).
Indicator responsibility	Chief Operations Officer

Indicator title	Number of employed learners entering learnership programmes.
Short definition	Number of employed learners registered for learnership programmes funded as per the merSETA funding model outlined in the merSETA Grants Policy.
Purpose/importance	To monitor the number of learners registered to enter a learnership programme that addresses scarce skills in the following occupations: Production / Operations Supervisor

Indicator title	Number of employed learners entering learnership programmes.
	(Manufacturing), Production / Operations Manager (Manufacturing), Automotive Motor Mechanic, Production Coordinator, Mechanical Fitter, Vehicle Body Builder, Vehicle Painter, Industrial Engineering Technologist, Electronic Equipment Mechanician, and any other scarce skills that stakeholders determine as needed but are not included in the top 10 list.
Source/collection of data	Learnership agreement, contract of employment or letter of confirmation of employment status for the duration of the learning programme, certified copy of ID or passport, confirmation of application of ID or foreign identification document (i.e. any one of the listed documents), certified copy of highest qualification or affidavits, confirmation of the training provider's accreditation for the specific learnership programme recorded on the merSETA MIS system.
Method of calculation	Count the number of learners registered on the MIS, where there is verifiable evidence, as listed above, and verified through the manual spreadsheet template.
Data limitations	Evidence documents required to capture learners not availed to merSETA in time for capturing and reporting within the relevant reporting period.
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New Indicator	No
Desired performance	In year 2019/20, at least 1900 learners will enter learnerships (supported by a range of monetary incentives and administrative systems).
Indicator responsibility	Chief Operations Officer

Indicator title	Number of employed learners completing a learnership.
Short definition	Number of employed learners successfully completing a learnership programme funded as per the merSETA funding model and the merSETA Grants Policy.
Purpose/importance	To monitor learners completing a learnership programmes that addresses scarce skills in the following occupations: Production / Operations Supervisor (Manufacturing), Production / Operations Manager (Manufacturing), Automotive Motor Mechanic, Production Coordinator, Mechanical Fitter, Vehicle Body Builder, Vehicle Painter, Industrial Engineering Technologist, Electronic Equipment Mechanician, and any other skills stakeholders determine as needed but not included in the top 10 list.
Source/collection of data	Learnership agreement, contract of employment or letter of confirmation of employment status for the duration of the learning programme, certified copy of ID or passport, confirmation of application of ID or foreign identification document (i.e. any one of the

	listed documents), certified copy of highest qualification or affidavits, confirmation of the training provider's accreditation for the specific learnership programme on the merSETA MIS system, copy of the moderation or assessment report, statement of results, a copy of the certificate or data of certified learners on the merSETA MIS system (i.e. any one of the listed types of evidence).
Method of calculation	Count the number of learners who completed the learnership programme and are certified on the MIS, where there is verifiable evidence, as listed above, and verified through the manual spreadsheet template.
Data limitations	Evidence documents required to capture learners not availed to merSETA in time for capturing and reporting within the relevant reporting period.
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, at least 3230 completed a learnership (supported by a range of monetary incentives and administrative systems).
Indicator responsibility	Chief Operations Officer

Indicator title	Number of unemployed graduates placed on internship programmes (Entered).
Short definition	The number of unemployed graduates who are funded as per the merSETA funding model and the merSETA Grants Policy, who have entered a qualification, and are placed on a structured work experience plan at a company or institute of higher education.. This indicator is for both entered and completed internships.
Purpose/importance	To monitor the number of unemployed graduates on internship programmes that address scarce skills for the following occupations: Industrial Engineering Technologist- and other company specific skills needs not included in the scare skills list; skills needs in demand for national priorities- and other legal entities' required skills needs. Provision is made in the Grants Policy to address the latter category of skills needs.
Source/collection of data	Learner registration form, internship agreement or employment contract, letter of confirmation of employment status for the duration of the learning programme, the merSETA site visit report, certified copy of Identity Document (ID) or passport, confirmation of application of ID or foreign identification document (i.e. any one of the listed documents), certified copy of highest qualification.
Method of calculation	Each learner is counted once for every internship programme commenced.
Data limitations	Evidence documents required to capture learners not availed to merSETA in time for capturing and reporting within the relevant reporting period. .

Indicator title	Number of unemployed graduates placed on internship programmes (Entered).
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, at least 400 learners are placed in internships (supported by a range of monetary incentives and administrative systems).
Indicator responsibility	Chief Operations Officer

Indicator title	Number of unemployed graduates placed on internship programmes (Completed).
Short definition	The number of unemployed graduates who are funded as per the merSETA funding model and the merSETA Grants Policy, who have completed a qualification on a structured work experience plan, at a company or institute of higher education. This indicator is for both entered and completed internships.
Purpose/importance	To monitor the number of unemployed graduates on internship programmes that address scarce skills for the following occupations: Industrial Engineering Technologist and other company specific skills needs not included in the scarce skills list, skills needs in demand for national priorities and other legal entities' required skills needs. Provision is made in the Grants Policy to address the latter category of skills needs.
Source/collection of data	Learner registration form, internship agreement or employment contract or letter of confirmation of employment status for the duration of the learning programme or the merSETA site visit report, certified copy of Identity Document (ID) or passport, confirmation of application of ID or foreign identification document (i.e. any one of the listed documents), certified copy of highest qualification.
Method of calculation	Each learner is counted once for every internship programme completed.
Data limitations	Evidence documents required to capture learners not availed to merSETA in time for capturing and reporting within the relevant reporting period.
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, at least 250 learners have completed an internships (supported by a range of monetary incentives and administrative systems).

Indicator title	Number of unemployed graduates placed on internship programmes (Completed).
Indicator responsibility	Chief Operations Officer

Indicator title	Number of TVET students placed at companies for work experience (Entered).
Short definition	Number of TVET students placed to acquire work experience and gain employable skills. This includes students placed in structural work experience programmes, such as apprenticeship and learnerships funded, as per the merSETA funding model and the merSETA Grants Policy.
Purpose/importance	To monitor the number of TVET students placed to acquire work experience that will address scarce skills for the occupations listed in Table 9 and 10 that will be acquired through apprenticeships, learnerships and occupationally directed skills programmes- as well as to address other company specific skills needs not included in the scarce skills list, skills needs in demand for national priorities and other legal entities' required skills needs. Provision is made in the Grants Policy to address the latter category of skills needs.
Source/collection of data	Learner registration form, internship agreement or employment contract or letter of confirmation of employment status for the duration of the learning programme or the merSETA site visit report, proof of completion, certified copy of ID or passport, confirmation of application of ID or foreign identification document (i.e. any one of the listed documents), certified copy of highest qualification from the TVET college.
Method of calculation	Each learner is counted once for every TVET placement programme commenced or completed.
Data limitations	None
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, at least 3000 learners are placed in companies (supported by a range of monetary incentives and administrative systems).
Indicator responsibility	Chief Operations Officer

Indicator title	Number of TVET students accessing work experience (Completed).
Short definition	Number of TVET students placed to acquire work experience and gain employable skills. This includes students placed in structural work experience programmes, such as

Indicator title	Number of TVET students accessing work experience (Completed).
	apprenticeship and learnerships funded as per the merSETA funding model, and the merSETA Grants Policy.
Purpose/importance	To monitor the number of TVET students who have completed work experience to address scarce skills for the occupations listed in Table 9 &10, that will be acquired through apprenticeships, learnerships and occupationally directed skills programmes, industrial engineers as well as other company specific skills needs not included in the scarce skills list, skills needs in demand for national priorities and other legal entities' required skills needs. Provision is made in the Grants Policy to address the latter category of skills needs.
Source/collection of data	Learner registration form, internship agreement or employment contract, letter of confirmation of employment status for the duration of the learning programme, the merSETA site visit report, proof of completion, certified copy of ID or passport, confirmation of application of ID or foreign identification document (i.e. any one of the listed documents), certified copy of highest qualification from the TVET college.
Method of calculation	Each learner is counted once for every TVET placement programme completed.
Data limitations	Evidence documents required to capture learners not availed to merSETA in time for capturing and reporting within the relevant reporting period.
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, at least 700 TVET learners completed work experience(supported by a range of monetary incentives and administrative systems).
Indicator responsibility	Chief Operations Officer

Indicator title	Number of graduates who entered candidacy programmes.
Short definition	Number of students placed at companies to acquire structured work experience that will contribute to (but not necessarily result in) the acquisition of professional registration, funded as per the merSETA funding model and the merSETA Grants Policy.
Purpose/importance	To monitor the number of graduates placed on the candidacy programme that addresses scarce skills for the technician and engineering occupations listed in Table 9 and 10, as well as other company specific skills needs not included in the scarce skills list, skills needs in demand for national priorities and other legal entities' required skills needs. Provision is made in the Grants Policy to address the latter category of skills needs.
Source/collection of data	Learner registration form or candidacy agreement, employment contract or letter of confirmation of employment status for the duration of the learning programme, the

Indicator title	Number of graduates who entered candidacy programmes.
	merSETA site visit report, confirmation of completion letter, statement of results or certificate, certified copy of ID or passport, confirmation of application of ID or foreign identification document (i.e. any one of the listed documents), certified copy of highest qualification.
Method of calculation	Each learner is counted once for every candidacy programme commenced or completed.
Data limitations	Evidence documents required to capture learners not availed to merSETA in time, for capturing and reporting within the relevant reporting period.
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, at least 20 learners are placed in a candidacy programme (supported by a range of monetary incentives and administrative systems).
Indicator responsibility	Chief Operations Officer

Indicator title	Number of graduates who completed a candidacy programme.
Short definition	Number of engineering graduates completing structured work experience that will contribute to (but not necessarily result in) the acquisition of a professional registration for completing work experience.
Purpose/importance	To monitor the number of graduates completing a candidacy programme that addresses scarce skills for the technician and engineering occupations listed in Table 9 and 10, as well as other company specific skills needs not included in the scarce skills list, skills needs in demand for national priorities and other legal entities' required skills needs. Provision is made in the Grants Policy to address the latter category of skills needs.
Source/collection of data	Learner registration form, candidacy agreement or employment contract, letter of confirmation of employment status for the duration of the learning programme, the merSETA site visit report, confirmation of completion letter, statement of results or certificate, certified copy of ID or passport, confirmation of application of ID or foreign identification document (i.e. any one of the listed documents), certified copy of highest qualification.
Method of calculation	Each learner is counted once for every candidacy programme completed.
Data limitations	Evidence documents required to capture learners not availed to merSETA in time for capturing and reporting within the relevant reporting period.

Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, at least 20 graduates completed a candidacy programme (supported by a range of monetary incentives and administrative systems).
Indicator responsibility	Chief Operations Officer

Indicator title	Number of unemployed learners entering skills programmes.
Short definition	Number of unemployed learners registered to enter skills programmes that are funded as per the merSETA funding model, and the merSETA Grants Policy. This includes registrations against individual unit standards.
Purpose/importance	To monitor the number of learners embarking on a skills programme that will address the critical skills gaps in the following occupations: Production / Operations Supervisor (Manufacturing), Production / Operations Manager (Manufacturing), Automotive Motor Mechanic, Production Coordinator, Mechanical Fitter, Vehicle Body Builder, Vehicle Painter, Industrial Engineering Technologist, Electronic Equipment Mechanician, and any other critical skills stakeholders determine as needed for occupations not included in the top 10 list.
Source/collection of data	Skills programme registration form, contract of employment or letter of confirmation of employment status for the duration of the learning programme, certified copy of ID or passport, confirmation of application of ID or foreign identification document (i.e. any one of the listed documents), certified copy of highest qualification or affidavits, confirmation of the training provider's accreditation for the specific skills programme on the merSETA MIS systems.
Method of calculation	Count the number of learners registered on the MIS, where there is verifiable evidence as listed above, and where it is verified using the manual spreadsheet.
Data limitations	None
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, at least 4000 learners entered into a skills programme (supported by a range of monetary incentives and administrative systems).

Indicator title	Number of unemployed learners entering skills programmes.
Indicator responsibility	Chief Operations Officer

Indicator title	Number of employed learners entering a skills programme.
Short definition	Number of employed learners registered to enter a skills programme funded as per the merSETA funding model, and the merSETA Grants Policy, including registrations against individual unit standards.
Purpose/importance	To monitor the number of learners embarking on a skills programme that will address the critical skills gaps in the following occupations: Production / Operations Supervisor (Manufacturing), Production / Operations Manager (Manufacturing), Automotive Motor Mechanic, Production Coordinator, Mechanical Fitter, Vehicle Body Builder, Vehicle Painter, Industrial Engineering Technologist, Electronic Equipment Mechanician, and any other critical skills stakeholders determine as needed for occupations not included in the top 10 list.
Source/collection of data	Skills programme registration form, contract of employment or letter of confirmation of employment status for the duration of the learning programme, certified copy of ID or passport, confirmation of application of ID or foreign identification document (i.e. any one of the listed documents), certified copy of highest qualification or affidavits, confirmation of the training provider accreditation for the specific skills programme on the merSETA MIS systems.
Method of calculation	Count number of learners registered on the MIS, where there is verifiable evidence as listed above, and which is verified against the manual spreadsheet.
Data limitations	Evidence documents required to capture learners not availed to merSETA in time for capturing and reporting within the relevant reporting period.
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, at least 4000 learners entered into a skills programme (supported by a range of monetary incentives and administrative systems).
Indicator responsibility	Chief Operations Officer.

Indicator title	Number of unemployed learners completing a skills programme.
Short definition	Number of employed learners registered to enter a skills programme funded as per the merSETA funding model, and the merSETA Grants Policy, including registrations against individual unit standards.
Purpose/importance	To monitor the number of learners embarking on a skills programmes that will address the critical skills gaps for the following occupations: Welder, Metal Engineering Process Worker, Boiler Maker, Electrician, Product Assembler, Diesel Mechanic, Mechanical Fitter, Industrial Engineer and any other critical skills stakeholders determine as needed for occupations not included in the top 10 list.
Source/collection of data	Skills programme registration form, contract of employment or letter of confirmation of employment status for the duration of the learning programme, certified copy of ID or passport, confirmation of application of ID or foreign identification document (i.e. any one of the listed documents), certified copy of highest qualification or affidavits, confirmation of the training provider's accreditation for the specific skills programme on the merSETA MIS system, a copy of the moderation or assessment report or a statement of results.
Method of calculation	Count the number of learners completed on MIS, where there is verifiable evidence, as listed above, and which is verified through the manual spreadsheet template.
Data limitations	Evidence documents required to capture learners not availed to merSETA in time, for capturing and reporting within the relevant reporting period.
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, at least 2633 learners have completed a skills programme (supported by a range of monetary incentives and administrative systems).
Indicator responsibility	Chief Operations Officer

Indicator title	Number of employed learners completing a skills programme.
Short definition	Number of employed learners registered to enter a skills programme funded as per the merSETA funding model, and the merSETA Grants Policy, including registrations against individual unit standards.
Purpose/importance	To monitor the number of learners embarking on a skills programme that will address the critical skills gaps for the following occupations: Production / Operations Supervisor (Manufacturing), Production / Operations Manager (Manufacturing), Automotive Motor Mechanic, Production Coordinator, Mechanical Fitter, Vehicle Body Builder, Vehicle Painter, Industrial Engineering Technologist, Electronic Equipment Mechanician, and any

Indicator title	Number of employed learners completing a skills programme.
	other critical skills stakeholders determine as needed for occupations not included in the top 10 list.
Source/collection of data	Skills programme registration form, contract of employment or letter of confirmation of employment status for the duration of the learning programme, certified copy of ID or passport, confirmation of application of ID or foreign identification document (i.e. any one of the listed documents), certified copy of highest qualification or affidavits, confirmation of the training provider accreditation for the specific Skills Programme on the merSETA MIS system, and a copy of moderation/ assessment report or statement of results.
Method of calculation	Count number of learners completed on MIS with verifiable evidence listed above, and verified through the manual spreadsheet template.
Data limitations	Evidence documents required to capture learners not availed to merSETA in time, for capturing and reporting within the relevant reporting period.
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, at least 3100 learners completed a skills programme (supported by a range of monetary incentives and administrative systems).
Indicator responsibility	Chief Operations Officer

Indicator title	Number of employed learners on bursaries (Entered).
Short definition	Number of workers who receive a bursary that is funded as per the merSETA funding model, and the merSETA Grants Policy. This will include learners who have entered, are continuing with or have completed a programme.
Purpose/importance	To monitor the number of workers receiving a bursary for commencement or progression or completion of programmes that address scarce skills for the following occupations: Production / Operations Manager (Manufacturing), Industrial Engineering Technologist and any other scarce skills stakeholders determine as needed, but not included as part of the top 10.
Source/collection of data	Learner registration form or confirmation of registration from education institution or continuation letter from education institution, contract of employment or letter of confirmation of employment status for the duration of the learning Programme, certified copy of ID or passport, confirmation of application of ID or foreign identification document (i.e. any one of the listed documents), certified copy of highest qualification, copy of statement of results or copy of certificate or letter signed by an authorised person such as

Indicator title	Number of employed learners on bursaries (Entered).
	the Head of Department or Dean of the Faculty, within the institution confirming the achievement.
Method of calculation	Count number of employed learners recorded manually or on the MIS with verifiable evidence listed above, and verified through the manual spreadsheet template.
Data limitations	None
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Annually
New indicator	No
Desired performance	In year 2019/20, 98 employed learners on bursaries, entered the programme and supported by a range of monetary incentives and administrative systems.
Indicator responsibility	Chief Operations Officer

Indicator title	Number of employed learners on bursaries (Completed).
Short definition	Number of workers who completed through a bursary that is funded as per the merSETA funding model, and the merSETA Grants Policy. This will include learners who have completed a programme.
Purpose/importance	To monitor the number of workers who have completed after receiving a bursary for completion of programmes that address scarce skills for the following occupations: Production / Operations Manager (Manufacturing), Industrial Engineering Technologist and any other scarce skills stakeholders determine as needed, but not included as part of the top 10.
Source/collection of data	Learner registration form or confirmation of registration from the education institution, or continuation letter from education institution, contract of employment or letter of confirmation of employment status for the duration of the learning programme, certified copy of ID or passport, confirmation of application of ID or foreign identification document (i.e. any one of the listed documents), certified copy of highest qualification, copy of statement of results, copy of certificate or letter signed by an authorised person such as the Head of Department or Dean of the Faculty, within the institution confirming the achievement.
Method of calculation	Count number of employed learners recorded manually or on the MIS with verifiable evidence listed above and verified through the manual spreadsheet template.
Data limitations	None

Indicator title	Number of employed learners on bursaries (Completed).
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Annually
New indicator	No
Desired performance	In year 2019/20, 97 of employed learners on bursaries completed and supported by a range of monetary incentives and administrative systems
Indicator responsibility	Chief Operations Officer

Indicator title	Number of unemployed learners on bursaries (Entered).
Short definition	Number of unemployed learners who have received funding, as per the merSETA funding model and the merSETA Grants Policy. These will include learners who have entered or completed programmes.
Purpose/importance	To monitor the number of unemployed learners receiving a bursary for commencement, progression or completion of programmes that address scarce skills for the following occupations: Production / Operations Manager (Manufacturing), Industrial Engineering Technologist and any other scarce skills stakeholders determine as needed, but not included as part of the top 10.
Source/collection of data	Continuation letter from the education institution, proof of payment, learner registration form with the institution or confirmation of registration from the education institution, certified copy of ID or passport, confirmation of application of ID or foreign identification document (i.e. any one of the documents listed), copy of statement of results, copy of certificate or letter signed by an authorised person such as the Head of Department or Dean of the Faculty, within the institution confirming the achievement.
Method of calculation	Count number of unemployed learners recorded manually or on the MIS as per the above verifiable evidence and verified through the manual spreadsheet template.
Data limitations	Evidence documents required to capture learners not availed to merSETA in time, for capturing and reporting within the relevant reporting period.
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Annually
New indicator	No

Indicator title	Number of unemployed learners on bursaries (Entered).
Desired performance	In year 2019/20, at least 475 unemployed learners receive bursaries and supported by a range of monetary incentives and administrative systems.
Indicator responsibility	Chief Operations Officer

Indicator title	Number of unemployed learners on bursaries (Completed).
Short definition	Number of unemployed learners who have completed through funding, as per the merSETA funding model, and the merSETA Grants Policy. These will include learners who have entered or completed programmes.
Purpose/importance	To monitor the number of unemployed learners on merSETA bursaries for commencement ,progression or completion of the programmes that address scarce skills for the following occupations: Production / Operations Manager (Manufacturing), Industrial Engineering Technologist and any other scarce skills stakeholders determine as needed but not included as part of the top 10.
Source/collection of data	Continuation letter from education institution, proof of payment or learner registration form with the institution, confirmation of registration from the education institution, certified copy of ID or passport, confirmation of application of ID or foreign identification document (i.e. any one of the documents listed), copy of statement of results, copy of certificate or letter signed by an authorised person such as the Head of Department or Dean of the Faculty, within the institution confirming the achievement.
Method of calculation	Count number of unemployed learners recorded manually or on the MIS as per the above verifiable evidence and verified through the manual spreadsheet template.
Data limitations	Evidence documents required to capture learners not availed to merSETA in time, for capturing and reporting within the relevant reporting period.
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Annually
New indicator	No
Desired performance	In year 2019/20, at least 475 unemployed learners who were bursary holders completed and supported by a range of monetary incentives and administrative systems.
Indicator responsibility	Chief Operations Officer

Indicator title	Number of learners entered for an artisan trade qualification.
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Short definition	Number of learners registered to enter an apprenticeship, who are funded as per the merSETA funding model, and the merSETA Grants Policy.
Purpose/importance	To monitor the number of learners registered to enter an apprenticeship that address scarce skills for the following occupations: Welder, Boiler Maker, Electrician, Diesel Mechanic, Mechanical Fitter and any other skills stakeholders determine as needed, but not included as part of the top 10.
Source/collection of data	Learnership/apprenticeship agreement, contract of employment or letter of confirmation of employment status for the duration of the learning programme, merSETA site visit report, certified copy of ID or passport, confirmation of application of ID or foreign identification document (i.e. any one of the listed documents, certified copy of highest educational qualification.
Method of calculation	Count number of learners entered and registered on MIS with verifiable evidence listed above, and verified through the manual spreadsheet template.
Data limitations	Evidence documents required to capture learners not availed to merSETA in time, for capturing and reporting within the relevant reporting period.
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20 at least 4366 entered into apprenticeships and supported by a range of monetary incentives and administrative systems.
Indicator responsibility	Chief Operations Officer

Indicator title	Number of learners completing an artisan trade qualification.
Short definition	Number of learners who have successfully completed an apprenticeship funded as per the merSETA funding model and the merSETA Grants Policy.
Purpose/importance	To monitor the number of learners completing an artisan trade qualification programme that addresses scarce skills for the following occupations: Automotive Motor Mechanical, Welder, Production/Operation Supervisor(manufacturing),Metal Engineering Process Worker; Boiler Maker, Electrician, Product Assembler, Diesel Mechanic, Mechanical Fitter, Industrial Engineerand any other skills stakeholders determine as needed but not included in the top 10 list.
Source/collection of data	Learnership/apprenticeship agreement, contract of employment or letter of confirmation of employment status for the duration of the learning programme, the merSETA site visit report, certified copy of ID or passport, confirmation of application of ID or foreign identification document (i.e. any one of the listed documents), certified copy of highest

Indicator title	Number of learners completing an artisan trade qualification.
	education qualification, a statement of results or proof of receipt of evidence by NAMB, a copy of a certificate or certification data on the merSETA MIS system.
Method of calculation	Count the number of learners completed on the MIS, where there is verifiable evidence as listed above, and which is verified against the manual spreadsheet.
Data limitations	Evidence documents required to capture learners not availed to merSETA in time, for capturing and reporting within the relevant reporting period.
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, at least 3400 learners qualify as apprentices (supported by a range of monetary incentives and administrative systems).
Indicator responsibility	Chief Operations Officer

Indicator title	Number of students accessing work integrated learning (WIL) to achieve the National Diploma (Entered).
Short definition	Number of learners placed in a merSETA member company to acquire a National Diploma through workplace integrated learning (WIL), who are funded as per the merSETA funding model, and the merSETA Grants Policy. The indicator includes both students who have entered and those who have completed a work integrated learning programmes.
Purpose/importance	To monitor the number of students on work integrated learning (WIL) programmes that address scarce skills for the technician and engineering occupations listed in Table 9 and 10, and any other skills stakeholders determine as needed, but not included in the top 10 list.
Source/collection of data	Learner registration form, contract of employment or letter of confirmation of employment status for the duration of the learning programme, merSETA site visit report, certified copy of ID or passport, confirmation of application of ID or foreign identification document (i.e. any one of the listed documents), certified copy of highest qualification. Completion evidence would include a letter from the employer or from the Institution confirming completion or copy of National Diploma.
Method of calculation	Each learner is counted once for registration of their work integrated learning.
Data limitations	Evidence documents required to capture learners not availed to merSETA in time, for capturing and reporting within the relevant reporting period.
Type of indicator	Output

Indicator title	Number of students accessing work integrated learning (WIL) to achieve the National Diploma (Entered).
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, at least 325 entered and supported by a range of monetary incentives and administrative systems.
Indicator responsibility	Chief Operations Officer

Indicator title	Number of students accessing work integrated learning (WIL) to achieve the National Diploma (Completed).
Short definition	Number of learners entered in a merSETA member company, to acquire a National Diploma through workplace integrated learning (WIL), who are funded as per the merSETA funding model, and the merSETA Grants Policy. The indicator includes both students who have entered and those who have completed work integrated learning programmes.
Purpose/importance	To monitor the number of students on work integrated learning (WIL) programmes that address scarce skills, for the technician and engineering occupations listed in Table 9 and 10, and any other skills stakeholders determine as needed, but not included in the top 10 list.
Source/collection of data	Learner registration form, contract of employment or letter of confirmation of employment status for the duration of the learning programme, the merSETA site visit report, certified copy of ID or passport, confirmation of application of ID or foreign identification document (i.e. any one of the listed documents) and certified copy of highest qualification. Completion evidence would include a letter from the employer or from the Institution confirming completion or copy of National Diploma.
Method of calculation	Each learner is counted once for completion of their work integrated learning.
Data limitations	Evidence documents required to capture learners not availed to merSETA in time, for capturing and reporting within the relevant reporting period.
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, at least 325 have completed WIL and supported by a range of monetary incentives and administrative systems.

Indicator title	Number of students accessing work integrated learning (WIL) to achieve the National Diploma (Completed).
Indicator responsibility	Chief Operations Officer

Indicator title	Number of candidates completing Recognition of Prior Learning (RPL).
Short definition	Number of candidates who are supported by merSETA to access and undergo the process of recognition of prior learning (RPL). The support will be either funding as per merSETA funding model, and the merSETA Grants Policy, or merSETA non-financial support deployed to facilitates access to the RPL processes.
Purpose/importance	To monitor the number of candidates who successfully complete an RPL process that addresses scarce skills in any of the occupations listed in the scarce skills list, other company specific skills needs not included in the scare skills list, and other legal entities' required skills needs. Provision is made in the Grants Policy to address the latter category of skills needs.
Source/collection of data	Learnership agreement or Artisan Recognition of Prior Learning (ARPL) trade test application form, certified copy of ID or passport, confirmation of application of ID or foreign identification document (i.e. any one of the listed documents), certified copy of highest educational qualification, letter of service in the case of ARPL, confirmation of the training provider accreditation in the case of RPL, copy of moderation or assessment report, statement of results or trade test results, copy of certificate or certification data on the merSETA MIS systems.
Method of calculation	Count the number of candidates that have obtained RPL competency certificates or artisan status on the MIS, where there is verifiable evidence as listed above, and which is verified against the manual spreadsheet.
Data limitations	Evidence documents required to capture learners not availed to merSETA in time, for capturing and reporting within the relevant reporting period.
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, at least 1500 candidates completing RPL (supported by a range of monetary incentives and administrative systems).
Indicator responsibility	Chief Operations Officer

Indicator title	Number of learners accessing AET programmes (Entered).
Short definition	Number of employed and unemployed adults who have entered an ABET, Foundational Learning Certificate (FLC) or other short course funded as per merSETA funding model, and the merSETA Grants Policy, including learners entered and learners completed.
Purpose/importance	To monitor employed and unemployed learners accessing adult learning programmes designed to address low skills, the skills needs of retrenched workers and re-skilling needs, in order to enable additional training or access to work opportunities.
Source/collection of data	Contract or learner registration form, contract of employment or letter of confirmation of employment status for the duration of the learning programme, the merSETA site visit report, proof of retrenchment from the employer, certified copy of ID or passport, confirmation of application of ID or foreign identification document (i.e. any one of the documents listed), certified copy of highest qualification or affidavits, copy of test results or statement of results, copy of certificate or certification data on the merSETA MIS system.
Method of calculation	Count the number of learners entered and registered on the MIS, where there is verifiable evidence as listed above, and which is verified against the manual spreadsheet.
Data limitations	Evidence documents required to capture learners not availed to merSETA in time, for capturing and reporting within the relevant reporting period.
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, at least 600 learners entered AET programmes and supported by a range of monetary incentives and administrative systems.
Indicator responsibility	Chief Operations Officer

Indicator title	Number of learners completing AET programmes
Short definition	Number of employed and unemployed adults who have completed an ABET, Foundational Learning Certificate (FLC), or another short course funded as per merSETA funding model, and the merSETA Grants Policy, including learners entered and learners completed.
Purpose/importance	To monitor employed and unemployed learners completing adult learning programmes designed to address low skills, the skills needs of retrenched workers and re-skilling needs, in order to enable additional training or access to work opportunities.
Source/collection of data	Contract or learner registration form, contract of employment or letter of confirmation of employment status for the duration of the learning programme ,the merSETA site visit

Indicator title	Number of learners completing AET programmes
	report , proof of retrenchment from the employer, certified copy of ID or passport, confirmation of application of ID or foreign identification document (i.e. any one of the documents listed), certified copy of highest qualification or affidavits, copy of test results, statement of results, copy of certificate or certification data on the merSETA MIS system.
Method of calculation	Count the number of learners who have completed an AET programme on the MIS, where there is verifiable evidence as listed above, and which is verified against the manual spreadsheet.
Data limitations	Evidence documents required to capture learners not availed to merSETA in time, for capturing and reporting within the relevant reporting period.
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, at least 400 learners completed AET programmes and are supported by a range of monetary incentives and administrative systems.
Indicator responsibility	Chief Operations Officer

Indicator title	Number of companies being paid a mandatory grant: large (150 + employees).
Short definition	Number of large firms (organisations employing 150 or more employees) that have been paid a Mandatory Grant.
Purpose/importance	To monitor payments of approved mandatory grants to large levy paying firms.
Source/collection of data	Access Record of approval on the merSETA MIS system or manual record, mandatory grant approval form, copy of system submission date, remittance advice or proof of payment.
Method of calculation	Count the number of paid large firms on the MIS, where there is verifiable evidence as listed above, and which is verified against the manual spreadsheet.
Data limitations	None
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Bi-annually

Indicator title	Number of companies being paid a mandatory grant: large (150 + employees).
New indicator	No
Desired performance	In year 2019/20, at least 500 large firms are paid a Mandatory Grant.
Indicator responsibility	Chief Operations Officer

Indicator title	Number of companies being paid a mandatory grant: medium (50-149 employees).
Short definition	Number of medium firms (organisations employing 50 - 149 employees) that have been paid mandatory grants.
Purpose/importance	To monitor the payment of approved mandatory grants to medium size levy paying firms.
Source/collection of data	Record of approval on the merSETA MIS system, or record of manual approval, mandatory grant approval form, copy of system submission date, remittance advice or proof of payment.
Method of calculation	Count the number of paid medium firms on the MIS, where there is verifiable evidence as listed above, and which is verified against the manual spreadsheet.
Data limitations	None
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Bi-annually
New indicator	No
Desired performance	In year 2019/20, at least 833 medium firms are paid a Mandatory Grant.
Indicator responsibility	Chief Operations Officer

Indicator title	Number of companies that are paid a mandatory grant: small (49 or less employees).
Short definition	Number of small firms (organisations employing 49 or less employees) that have been paid a Mandatory Grant.
Purpose/importance	To monitor the payment of approved mandatory grants to small levy paying firms.

Indicator title	Number of companies that are paid a mandatory grant: small (49 or less employees).
Source/collection of data	Record of approval on merSETA MIS system or record of manual approval, a Mandatory Grant approval form, copy of system submission date, remittance advice or proof of payment.
Method of calculation	Count the number of paid small levy paying firms on the MIS, where there is verifiable evidence as listed above, and which is verified against the manual spreadsheet.
Data limitations	None
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Bi-annually
New indicator	No
Desired performance	In year 2019/20, at least 2135 small firms are a paid a Mandatory Grant.
Indicator responsibility	Chief Operations Officer

Indicator title	Number of new TVET college partnerships established.
Short definition	Number of TVET colleges that have a new signed memorandum of agreement with merSETA.
Purpose/importance	To monitor the new TVET partnership projects that address the skills needs of the sector or national priorities.
Source/collection of data	Copy of signed partnership agreement, progress report or site visit report against set deliverables.
Method of calculation	Count the number of agreements, where there is verifiable evidence as indicated above.
Data limitations	None
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Annually
New indicator	No
Desired performance	In year 2019/20 there are at least eight partnerships established.
Indicator responsibility	Chief Operations Officer

Indicator title	Number of new SETA / HEI partnerships established.
Short definition	Number of HEIs that have a new signed memorandum of agreement with the merSETA.
Purpose/importance	To monitor the HEI partnership projects that address the skills needs of the sector and national priorities.
Source/collection of data	Copy of signed partnership agreement, progress report or site visit report against set deliverables.
Method of calculation	Count the number of signed agreements, where there is verifiable evidence as indicated above.
Data limitations	None
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Annually
New indicator	No
Desired performance	In year 2019/20, there are at least six new partnerships established.
Indicator responsibility	Chief Executive Officer

Indicator title	Number of SETA/ employer partnerships established.
Short definition	Number of employers that have entered into a new signed memorandum of agreement with merSETA.
Purpose/importance	To monitor the SETA/employer partnerships that address the skills needs of the sector.
Source/collection of data	Copy of signed partnership agreements, progress reports or site visit reports against set deliverables.
Method of calculation	Count the number of signed agreements, where there is verifiable evidence as indicated above.
Data limitations	None
Type of indicator	Output
Calculation type	Cumulative

Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, there are at least 1600 partnerships established.
Indicator responsibility	Chief Operations Officer

Indicator title	Number of new SETA/government partnerships established.
Short definition	Number of new formal agreements that merSETA has with national, provincial and local government departments, as well as with public entities.
Purpose/importance	To monitor the partnership projects that address the skills needs of the sector.
Source/collection of data	Copy of signed partnership agreements, progress reports or site visit reports against set deliverables.
Method of calculation	Count the number of signed agreements where there is verifiable evidence, as indicated above.
Data limitations	None
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Annually
New indicator	Yes
Desired performance	At least two new government/public entity partnerships established.
Indicator responsibility	Chief Executive Officer

Indicator title	Number of lecturers developed (Entered).
Short definition	Number of lecturers that have entered an intervention that will contribute to their development.
Purpose/importance	To monitor the number of lecturers who have entered the development programmes through either, work experience, short courses, formal artisan training or having registered for a qualification with an HEI.

Source/collection of data	ID copy, learner registration form or attendance register, a letter of confirmation from an institution or organisation that hosts work experience, proof of registration for an HEI qualification, confirmation of registration with an HEI or proof of completion of a course.
Method of calculation	Count the number of candidates attending or registered at an institution, where there is verifiable evidence as indicated above.
Data limitations	Evidence documents required to capture learners not availed to merSETA in time, for capturing and reporting within the relevant reporting period. .
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, at least 50 entered lecturers are developed and supported by a range of monetary incentives and administrative systems.
Indicator responsibility	Chief Operations Officer.

Indicator title	Number of lecturers developed (Completed).
Short definition	Number of lecturers that have completed an intervention that will contribute to their development.
Purpose/importance	To monitor the number of lecturers who have completed development programmes through either, work experience, short courses, formal artisan training or having registered for a qualification with an HEI.
Source/collection of data	ID copy, learner registration form or attendance register, a letter of confirmation of completion from an institution or organisation that hosts work experience, proof of registration for an HEI qualification, confirmation of registration with an HEI or proof of completion of a course.
Method of calculation	Count the number of candidates completed at an institution, where there is verifiable evidence, as indicated above.
Data limitations	Evidence documents required to capture learners not availed to merSETA in time, for capturing and reporting within the relevant reporting period. .
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No

Desired performance	In year 2019/20, at least 50 lecturers have completed a development programme and supported by a range of monetary incentives and administrative systems.
Indicator responsibility	Chief Operations Officer

Indicator title	Number of co-operatives supported through skills development.
Short definition	Number of co-operatives that have been supported by the merSETA through skills development by training, funding , mentoring, workshops, project visits or guidance on accessing grants.
Purpose/importance	To monitor the skills development interventions for co-operatives (rural and urban), and workshops and meetings held to provide information and guidance on accessing grants.
Source/collection of data	Copy of an agreement, a copy of a detailed site visit report or progress report, minutes of meetings / an attendance register or workshop presentation, an agenda that includes a clear purpose of the meeting or workshop.
Method of calculation	Count the number of co-operatives supported, where there is verifiable evidence as indicated above.
ata limitations	None
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, at least 20 businesses are supported by a range of monetary incentives and administrative systems.
Indicator responsibility	Chief Operations Officer

Indicator title	Number of co-operatives supported through skills development.
Short definition	Number of co-operatives that have been supported by the merSETA through skills development by training, funding, mentoring, workshops, project visits, or guidance on accessing grants.
Purpose/importance	To monitor the skills development interventions of co-operatives (rural and urban), and workshops and meetings held to provide information and guidance on accessing grants.

Source/collection of data	Copy of an agreement, a copy of a detailed site visit report or progress report, minutes of meetings/ an attendance register or workshop presentation, an agenda that includes a clear purpose of the meeting or workshop.
Method of calculation	Count the number of co-operatives supported, where there is verifiable evidence as indicated above.
Data limitations	None
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, at least 20 businesses are supported by a range of monetary incentives and administrative systems.
Indicator responsibility	Chief Operations Officer

Indicator title	Number of NPOs supported through skills development (NGOs and registered CBOs).
Short definition	Number of Non-Profit Organisations, including Non-Government Organisations and Community Based Organisations (CBOs), that have been supported by the merSETA through skills development, by training, funding, mentoring, workshop, project visits or guidance on accessing grants.
Purpose/importance	To monitor the skills development interventions for NPOs, and workshops and guidance on accessing grants.
Source/collection of data	Copy of an agreement, a copy of a detailed site visit report or progress report, minutes of meetings/ an attendance register or workshop presentation, an agenda that includes a clear purpose of the meeting or workshop.
Method of calculation	Count the number of NPOs inclusive of NGOs and legal registered CBOs supported where there is verifiable evidence as indicated above.
Data limitations	None
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No

Desired performance	In year 2019/20, at least 12 NPOs (seven NGOs and five CBOs) are supported by a range of monetary incentives and administrative systems.
Indicator responsibility	Chief Operations Officer

Indicator title	Number of NLPEs supported through skills development.
Short definition	Number of Non-Levy Paying Enterprises (NLPEs) that are supported by merSETA through skills development funding, mentoring or one-on-one induction or guidance on accessing grants.
Purpose/importance	To monitor skills development interventions and workshops/meetings held to provide information and guidance on accessing grants.
Source/collection of data	Copy of an agreement, a copy of a detailed site visit report or progress report, minutes of meetings/ an attendance register or workshop presentation, an agenda that includes a clear purpose of the meeting or workshop.
Method of calculation	Count the number of NLPEs supported, where there is verifiable evidence as indicated above.
Data limitations	None
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, at least 200 NLPEs are supported.
Indicator responsibility	Chief Operations Officer

Indicator title	Number of trade unions supported through skills development.
Short definition	Number of trade unions that have been supported by the merSETA through skills development funding for training.
Purpose/importance	To monitor the skills development interventions in the trade union agreements.
Source/collection of data	Copy of signed agreement, copy of site visit report and proof of payment.

Method of calculation	Count the number of signed trade unions supported, where there is verifiable evidence as indicated above.
Data limitations	None
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, at least four trade unions are supported
Indicator responsibility	Chief Operations Officer.

Indicator title	Number of small businesses supported through skills development.
Short definition	Number of small business (1-49 employees) that have been supported by merSETA through skills development funding or mentoring , one-on-one induction or guidance on accessing grants.
Purpose/importance	To monitor the skills development interventions for small businesses or workshops/meetings held to provide information and guidance on accessing grants.
Source/collection of data	Copy of an agreement, a copy of a detailed site visit report or progress report, minutes of meetings/ an attendance register or workshop presentation an agenda that includes a clear purpose of the meeting or workshop.
Method of calculation	Count the number of small businesses supported, where there is verifiable evidence as indicated above.
Data limitations	None
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, at least 1500 small businesses are supported.
Indicator responsibility	Chief Operations Officer

Indicator title	Number of rural development project supported through skills development.
Short definition	Number of rural based skills development projects supported through funding.
Purpose/importance	To monitor the skills development interventions of rural projects.
Source/collection of data	Copy of partnership agreement, tranche payment report or proof of payment.
Method of calculation	Count the number of rural projects supported, where there is verifiable evidence as indicated above.
Data limitations	None
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	In year 2019/20, at least four projects are supported.
Indicator responsibility	Chief Operations Officer

10.4 Programme 4: Quality assurance

Table 20: Programme 4: Quality Assurance Indicators

Indicator title	Number of mer-sector occupational qualifications developed and submitted to QCTO.
Short definition	Full or part qualifications developed and submitted for registration on the NQF via the QCTO that address identified sector needs.
Purpose/importance	To monitor whether the development and submission process of full, or part qualifications that address changing/emerging/new occupations in the sector is completed in accordance with the signed SLA / Memorandum of Understanding (MOU).
Source/collection of data	Signed SLA/MOU with QCTO, progress report.
Method of calculation	Count the number of mer-sector part, or full occupational qualifications developed and submitted to QCTO.
Data limitations	None
Type of indicator	Output

Indicator title	Number of mer-sector occupational qualifications developed and submitted to QCTO.
Calculation type	Cumulative
Reporting cycle	Annually
New indicator	Yes
Desired performance	In year 2019/20, at least 10 part or full occupational qualifications are developed and submitted to QCTO.
Indicator responsibility	Chief Operations Officer

Indicator title	% of providers implementing merSETA occupational qualification that are monitored.
Short definition	This will be the percentage of the total number of implementing providers.
Purpose/importance	To monitor the quality of providers' implementation processes and standards for the merSETA occupational qualifications, as delegated by the QCTO, and in accordance with the merSETA learning programme quality assurance policies.
Source/collection of data	List of providers implementing merSETA occupational qualifications, site visit provider monitoring report on implementing providers, learner and employer evaluation forms or questionnaires/interviews, service provider/assessor or moderator report and training observation report.
Method of calculation	Total number of providers implementing merSETA occupational qualification monitored, divided by the total number of providers implementing merSETA occupational qualifications.
Data limitations	None
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	Yes
Desired performance	70%
Indicator responsibility	Chief Operations Officer

Indicator title	Number of career awareness events implemented/in which merSETA participated.
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Short definition	This is the number of career advice events in which merSETA participated or initiated to provide learners with occupational and career information, with respect to careers in the mer-sector, as well as the number of initiatives for improved career advice approaches and methodologies.
Purpose/importance	The purpose of this indicator is to monitor the number of events not initiated by the merSETA at which the merSETA participated, or the number of events initiated by the merSETA, as well as the number of initiatives for improved career advice approaches and methodologies.
Source/collection of data	Learner attendance register, quarterly report on events implemented/at which the merSETA participated, proof of invitation from, and to merSETA, reports on career advice approaches and methodologies implemented.
Method of calculation	Count the number of events in which merSETA participated or count the number of events that the merSETA initiated, where there is verifiable evidence as indicated above. Count the number of reports on career awareness events, where improved approaches and methodologies were implemented.
Data limitations	None
Type of indicator	Output
Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	No
Desired performance	50 career awareness events implemented.
Indicator responsibility	Corporate Services Executive

Indicator title	Number of innovation projects implemented.
Short definition	This is the number of career advice/guidance/support projects that use new/innovative approaches and methods and includes skills competition related projects.
Purpose/importance	The purpose of this indicator is to monitor the number of innovation projects implemented, that can be adopted by the sector.
Source/collection of data	Projects reports
Method of calculation	Count the number of innovation projects implemented.
Data limitations	None
Type of indicator	Output

Calculation type	Cumulative
Reporting cycle	Quarterly
New indicator	Yes
Desired performance	Three innovation projects implemented.
Indicator responsibility	Corporate Services Executive



higher education & training

Department:
Higher Education and Training
REPUBLIC OF SOUTH AFRICA

SERVICE LEVEL AGREEMENT

entered into by and between


DEPARTMENT OF HIGHER EDUCATION AND TRAINING

(hereinafter referred to as the "DHET" represented by GF Qonde, duly authorized thereto
by virtue of his capacity as the Director-General),

and

MANUFACTURING, ENGINEERING AND RELATED SERVICES SECTOR EDUCATION AND TRAINING AUTHORITY (MERSETA)

(hereinafter referred to as "SETA" represented by Ms L.Letsoalo duly authorised
thereto in his/her capacity as Chairperson of the Accounting Authority/Administrator)

Initials 

1. PURPOSE OF THE SERVICE LEVEL AGREEMENT

This service level agreement is entered into between the above mentioned parties to agree on the minimum service levels required by the SETA in performing its statutory functions, meeting the National Skills Development Strategy targets and implementing its strategic plan and annual performance plan.

2. DURATION OF THE SERVICE LEVEL AGREEMENT

The service level agreement is entered into for the period of 1 April 2019 to 31 March 2020

3. OBLIGATIONS OF THE SETA

3.1 The SETA undertakes to :

- 3.1.1 perform its functions as required by the Skills Development Act;
- 3.1.2 meet the targets in the National Skills Development Strategy;
- 3.1.3 implement the approved Strategic Plan and Annual Performance Plan;
- 3.1.4 submit all documentation and reports as may be required by the Department on the times specified; and
- 3.1.5 adhere to the requirements of the Public Finance Management Act and Treasury Regulations.
- 3.1.6 address all findings raised by the Auditor-General in the previous financial year.
- 3.1.7 submit comprehensive plan of action to the department.

3.2 Perform and provide the information and/or reports on the activities listed below:

- 3.2.1 assessment of the skills required for each sector and to identify scarce skills;
- 3.2.2 how the levels of education will be improved in the sector;
- 3.2.3 partnerships between SETAs and public Technical and Vocational Education and Training (TVET) colleges, Universities, training providers and industry;

Initials 

- 3.2.4 the number of bursaries awarded/to be awarded to deserving South African citizens in critical skills at 25 Universities and 50 TVET colleges;
- 3.2.5 scarce and critical skills needs in the sector, how it will be addressed and reflected in the number of learners that will be trained and placed, as well as the companies involved;
- 3.2.6 number of agreements signed with public TVET colleges , Universities and other training providers as well as the amount approved per agreement which should also reflect the number of learners that will be trained, types of training programmes and programmes that are in place;
- 3.2.7 targets as reflected in the Annual Performance Plan must be credible and linked to a "Baseline ";
- 3.2.8 placement of lecturers in industry as part of the Service Level Agreement;
- 3.2.9 rural development programmes and how it will be implemented;
- 3.2.10 support the revitalization of rural and township economy;
- 3.2.11 progress in the implementation of Recognition of Prior Learning;
- 3.2.12 establish working relationships with TVET colleges, Universities and industry for the purpose of placement of students and graduates;
- 3.2.13 ensure the placement of TVET students, University of Technology students and University graduates requiring Work Integrated Learning (WIL) in the relevant sector and provide report on quarterly basis;
- 3.2.14 maintain and operationalize SETA offices in (name of colleges where offices are/is):
- **Buffalo City TVET College**
 - **Lovedale TVET College**
 - **Ekurhuleni East TVET College**
- 3.2.15 support offices opened by other SETAs (Lead SETAs) in TVET colleges;
- 3.2.16 conclude work from previous performance years commitments and submit reports as required by the Department;
- 3.2.17 sector funded training identified and reported on quarterly basis.

Initials 

- 3.2.18 annual targets for registered and completed artisan learners by listed trade as agreed with the Chief Directorate: INDLELA to address HRDC ATD-TTT Bottleneck 1;
- 3.2.19 monthly reports in a format determined by the Chief Directorate: INDLELA of the actual number of registered and completed artisan learners to address HRDC ATD-TTT Bottleneck 1;
- 3.2.20 implementation of the Policy on Generic National Artisan Learner Grant Funding and Administration System to address HRDC ATD-TTT Bottleneck 2;
- 3.2.21 the number of persons supported to become qualified artisans within the national artisan learner Recognition of Prior Learning system determined by the Chief Directorate: INDLELA to address HRDC ATD-TTT Bottleneck 3;
- 3.2.22 provide financial support to world skills South Africa through the DHET approved structure;
- 3.2.23 submit an implementation plan of the commitments made in this SLA within the first quarter of the financial year;
- 3.2.24 In relations to the 13 priority trade needed for the construction and maintenance of the government's Strategic Integrated Projects (SIPs) and well as for other strategic projects (such as Phakisa and War on Leaks) the SETA should:
 - 3.2.24.1 Conditionally allocate 120 apprenticeship / learnership grants indicated in Annexure X to employers that meet the following three criteria, noting that these grants, if issued, will contribute to the SETA targets for Artisans entered': the employers
 - 1. Are within a commutable distance (about 25 kms) form the TVET College campus selected as a Centre of Specialization for the specified trade;
 - 2. Commit to working with the specified Centre of Specialization for the trade;

Initials 

3. Undertake to partner with a college to pilot the rollout of the QCTO trade qualification using the dual system methodology.

DHET appreciates that achievement of this conditional commitment is dependent on appropriate employer applications and it will therefore be evaluated in this light.

3.2.24.2 Open the application window for the employers for these grants between January and August annually.

3.2.24.3 Finalize the allocation of these grants and report to DHET on the results no later than 30 September annually.

3.2.24.4 Sympathetically consider applications from the Centre of Specialization colleges for contributions to their DHET-approved improvement plans for the delivery of these trades, noting that such contributions will be counted towards the achievement of relevant targets under **'Promoting the growth of a public TVET college system that is responsive to sector, local, regional and national skills needs and priorities'**.

3.2.25 meet minimum targets as reflected in the table below:


Initials

NSDS III GOAL	PERFORMANCE INDICATORS	BASELINE	SETA FUNDED TARGETS	SECTOR FUNDED TARGETS
Establishing a credible institutional mechanism for skills planning	Large Firms	500	500	0
	Medium Firms	833	833	0
	Small Levy Paying Firms	2135	2135	0
Increase access to occupationally directed programmes	Unemployed Entered Learnerships	2500	2500	0
	Unemployed Entered Bursaries	475	475	0
	Unemployed Entered Internships	400	400	0
	Unemployed Entered Skills Programmes	4000	4000	0
	Unemployed Completed Learnerships	3000	3000	0
	Unemployed Completed Bursaries	475	475	0
	Unemployed Completed Internships	250	250	0
	Unemployed Completed Skills Programmes	2633	2633	0
	Artisans Entered	4366	4366	0
	Artisans Completed	3400	3400	0
Encouraging better use of workplace-based-skills programmes	Workers Entered Learnerships	1900	1900	0
	Workers Entered Bursaries	98	98	0
	Workers Entered Skills Programmes	4000	4000	0
	Workers Completed Learnerships	3230	3230	0
	Workers Completed Bursaries	97	97	0
	Workers Completed Skills Programmes	3100	3100	0
	Candidacy Programme Entered	20	20	0
	Candidacy Programme Completed	20	20	0
	Recognition of prior Learning (RPL)	1500	1500	0
	TVET Student Placement Entered	3000	3000	0

Initials 

Promoting the growth of a public TVET college system that is responsive to sector ,local ,regional and national skills needs and priorities	TVET Student Placement Completed	700	700	0
	Universities Student Placement Entered	325	325	0
	Universities Student Placement Completed	325	325	0
	SETA/TVET College Partnerships	8	8	0
	SETA/Universities Partnerships	6	6	0
	SETA/Employer Partnerships	1600	1600	0
	Lecturer Development Programmes Entered	50	50	0
	Lecturer Development Programmes Completed	50	50	0
	Number of SETA Offices opened in TVET Colleges (List the names of the VET Colleges opened)	3	3	0
Addressing the low level of youth and adult language and numeracy skills to enable additional training	AET Programmes Entered	600	600	0
	AET Programmes Completed	400	400	0
Encouraging and supporting the co-operatives, small enterprises, worker initiatives, NGO and community training Initiatives	Cooperatives Supported	20	20	0
	Small Business Supported	1500	1500	0
	NGOs	7	7	0
	NLPE	200	200	0
	CBO	5	5	0
	Trade Unions	4	4	0
Building Career Guidance and				
	Career Guidance Events	50	50	0

Initials 

Vocational guidance				
NSDS III Projects	Number of Provincial and Rural Projects Planned	4	4	0
Governance	Number of Governance Charter Reports submitted	4	4	0

4. OBLIGATIONS OF DEPARTMENT OF HIGHER EDUCATION AND TRAINING

4.1 The Department undertakes to:

- 4.1.1 consult the SETA on policy and strategic matters that may affect the functioning of the SETA;
- 4.1.2 provide the SETA with guidance on sector skills plans, strategic plans and any matter that may be requested by the SETA in relation to its functions; and
- 4.1.3 assist the SETA where applicable in performing its functions and responsibilities.
- 4.1.4 validate and verify the accuracy and usefulness of reports submitted by SETAs and provide feedback quarterly.

Initials 

5. GENERAL

In year amendments to the approved Service Level Agreement must not be encouraged.

SIGNED AT Maseru ON THIS ____ DAY OF February 2019



ACCOUNTING AUTHORITY/ADMINISTRATOR

(Represented by _____ who warrants that he/she is duly authorised to this agreement)

SIGNED AT _____ ON THIS ____ DAY OF _____ 2019

DIRECTOR-GENERAL

(Represented by GF Qonde, duly authorized thereto)

Initials 

Acronyms and Abbreviations

APP - Annual Performance Plans

DG - Director General of Higher Education and Training

DHET - Department of Higher Education and Training

HRDC ATDTT – Human Resource Development Council- Artisan Development Technical Task Team

Minister - Minister of the Department of Higher Education and Training

M & R - Sub-directorate: Monitoring and Reporting of the SPM

NC (V) - National certificate (Vocational)

NSDS - National Skills Development Strategy

RPL - Recognition of Prior Learning

SETA - Sector Education and Training Authority

SLA - Service Level Agreement

SPM - SETA Performance Management of the DHET

SP - Strategic Plans

SSP - Sector Skills Plans

TVET - Technical and Vocational Education and Training (formerly FET)

WIL - Work Integrated Learning

Initials 

12 ANNEXURE D: MATERIALITY FRAMEWORK



13 November 2018

Mr G. Qonde
The Director General
Department of Higher Education & Training
123 Francis Baard Street
Pretoria
0001

Dear Mr Qonde

MERSETA MATERIALITY FRAMEWORK

In terms of the Regulation 28.3.1 of the Treasury Regulations issued in terms of the Public Management Finance Act (PFMA), Act no.1 of 1999, for the purposes of materiality [Section 55(2) of the PFMA] and significance [Section 54(2) of the PFMA], the Accounting Authority must develop and agree on a framework of acceptance levels of materiality and significance with the relevant Executive Authority, in consultation with the External Auditors.

Herewith please find the merSETA Materiality Framework in compliance with the above-mentioned Treasury Regulations, for agreement and endorsement by the DHET.

Kindly advise should you require any further information regarding this submission.

Yours sincerely

Mr. Wayne Adams
ACTING CHIEF EXECUTIVE OFFICER

TREASURY REGULATION 28.1.5

“For purposes of “material” [sections 50(1) and 55(2) the PFMA] and “significant” [section 54(2) of the PFMA], the accounting authority must develop and agree a framework of acceptable levels of materiality and significance with the relevant executive authority in consultation with the external auditors.”

		Material
Section 50 (1)	<p>(1) The accounting authority for a public entity must –</p> <p>(a) exercise the duty of utmost care to ensure reasonable protection of the assets and records of the public entity;</p> <p>(b) act with fidelity, honesty, integrity and in the best interest of the public entity in managing the financial affairs of the public entity;</p> <p>(c) on request, disclose to the Executive Authority responsible for that public entity or the legislature to which the public entity is</p>	<p>Appropriate systems of control and risk management are maintained as well as a risk management plan which is reviewed quarterly by management. Internal auditors conduct regular reviews according to an approved audit plan to ensure that the internal controls are effective and efficient.</p> <p>merSETA sets high standards for good governance and ethical behaviour. The entity has adopted the Batho Pele values as its core values (We Care, We Serve, We Belong). The best interest of the public entity is always relevant and reflected in the strategic plan as approved by the Accounting Authority, and the implementation of the strategic plan is of the utmost importance.</p> <p>merSETA is committed to have an open and transparent culture and to</p>

	<p>accountable, all material facts, including those reasonably discoverable, which in any way influence the decision or action of the Executive Authority or that legislature; and</p> <p>(d) Seek, within the sphere of influence of that Accounting Authority, to prevent any prejudice to the financial interests of the state.</p>	<p>disclose any quantitative and qualitative facts:</p> <ul style="list-style-type: none"> • Any fact discovered of which the amount exceeds the materiality figure; • Any unplanned events that affect the fulfilment of the entity's mandate; • Any activity that is outside the parameters of the provisions of the Skills Development Act, No 97 of 1998 (as amended); and • Any fact discovered of which its omission or misstatement will affect the functioning of the entity. <p>merSETA employs risk management plans and reviews and identifies processes aimed at preventing any prejudice to the financial interest of the state.</p>
Section 55 (2)	<p>(2) The annual report and financial statement referred to by PFMA Subsection 55 (1)(d) must –</p> <p>(a) fairly present the state of affairs of the public entity, its business, its financial results, its performance against pre-determined objectives and its financial position as at the end of</p>	<p>Materiality is R 5,733,720 – 0.5% of total expenses as per 2016/17 audited financial statements (R 1,146 744,000). The merSETA is a public entity which is service driven (non-profit), therefore total expenditure will be used to set the materiality perimeter.</p> <p>The annual report is prepared in accordance with Treasury guidelines and financial results as per the GRAP statements. The financial results and pre-determined objectives are audited, and the full annual report is</p>

	<p>the financial year concerned;</p> <p>(b) Include particulars of –</p> <p>(i) Any material losses through criminal conduct and any irregular expenditure and fruitless and wasteful expenditure that occurred during the financial year;</p> <p>(ii) Any criminal or disciplinary steps taken as a consequence of such losses or irregular expenditure or fruitless and wasteful expenditure;</p> <p>(iii) Any losses recovered or written off;</p>	<p>reviewed by the external auditors, to ensure that they fairly present the state of affairs of the public entity.</p> <p>Information shall be provided with respect to:</p> <ul style="list-style-type: none"> • Losses through criminal conduct, irrespective of value; and • Losses through irregular, fruitless and wasteful expenditure provided that the combined total exceeds the materiality figure or are material by virtue of their nature. <p>Losses through criminal conduct, irregular, fruitless and wasteful expenditure that have occurred during the year shall be disclosed in the Annual Report.</p> <p>All criminal or disciplinary actions taken shall be disclosed.</p>
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	<p>(iv) Any financial assistance received from the state, and commitment made by the state on its behalf; and</p> <p>(v) Any other matters that may be prescribed; and</p> <p>(c) Include the financial statements of any subsidiaries.</p>	<p>All losses recovered and written off shall be disclosed.</p> <p>All financial assistance received from the state, and commitments made by the state on merSETA's behalf shall be disclosed in full.</p> <p>Shall disclose all other matters as prescribed.</p> <p>Not applicable.</p>
Section 54 (2)	<p>(2) Before a public entity concludes any of the transactions, the Accounting Authority for the public entity must promptly, and in writing inform the relevant treasury of the transaction and submit relevant particulars of the transaction to its Executive Authority for approval of the transaction:</p> <p>(a) Establishment or participation in the establishment of a company</p>	<p>Information shall be provided for approval for the following transactions:</p> <p>(a) Any transaction to establish a company</p>

	<p>(b) Participation in a significant partnership, trust, unincorporated joint venture or similar arrangement</p> <p>(c) Acquisition or disposal of a significant shareholding in a company</p> <p>(d) Acquisition or disposal of a significant asset</p> <p>(e) Commencement or cessation of a significant business activity, and</p> <p>(f) A significant change in the nature or extent of its interest in a significant partnership, trust, unincorporated joint venture or similar arrangement.</p>	<p>(b) Any participation in a significant partnership, trust unincorporated joint venture or similar agreement</p> <p>(c) Any transaction to acquire or dispose of significant shareholding in a company</p> <p>(d) Acquisition or disposal of a significant asset</p> <p>(e) Commencement or cessation of a significant business activity, and</p> <p>(f) Where there is significant change in nature and extent of interest in a significant partnership, trust, unincorporated joint venture or similar arrangement.</p>
Proposed Framework	Quantitative	
	Guidelines on setting the parameters for materiality are obtained from section 3.7.1 of the National Treasury Practice Note on applications under section 54 of the PFMA, Act No 1 of 1999 by public entities.	

	Operational Expenditure	R 5,733,720
	0.5% of total expenditure (2017 Annual Financial Statements). Although the National Treasury Practice Note recommends the use of total revenue, we had elected to use total expenditure as the entity is service driven in nature.	
	Capital Expenditure	R 26,363,280
	1% of total assets (2017 Annual Financial Statements: R 2,636,328,000) Each loss due to criminal conduct, irregular expenditure or fruitless and wasteful expenditure, as identified, will be evaluated in the context of the expense category to which it relates, to determine whether it qualifies for disclosure in the Annual Report as required by Section 54.	
		The guiding principles of “material” facts are anything that can affect or influence the users of the Annual Report.

	Qualitative	
	Over and above the financial considerations of materiality, any losses due to criminal conduct are considered to be material by nature, irrespective of the quantum thereof.	

GRANTS POLICY 2019/20

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1. Acronyms

AA	Accounting Authority
ABET	Adult Basic Education and Training
AET	Adult Education and Training
APP	Annual Performance Plan
ARPL	Artisan Recognition of Prior Learning
ATR	Annual Training Report
AMIC	Automobile Manufacturing Industry Certificate
CEO	Chief Executive Officer
COO	Chief Operations Officer
CBOs	Community-based Organisations
CETCs	Community Education and Training Colleges
DHET	Department of Higher Education and Training
GETCA	General Education and Training Certificate for Adults
HEI	Higher Education Institution
ISO	International Organisation for Standardisation
MANCO	Management Committee
merSETA	Manufacturing Engineering and Related Services Sector Education and Training Authority
MoA	Memorandum of Agreement
NASCA	National Senior Certificate for Adults
NCV	National Certificate Vocational
NGO	Non-governmental Organisation
NPO	Non-profit Organisations
NPP	Non PIVOTAL Plan

NQF	National Qualifications Framework
NSDMS	National Skills Development Management System
NSDS	National Skills Development Strategy
PIVOTAL	Professional, Vocational, Technical and Academic Learning
PPP	Public Private Partnership
PP	PIVOTAL Plan
PR	PIVOTAL Report
PwDs	People with Disabilities
QCTO	Quality Council for Trades and Occupations
RPL	Recognition of Prior Learning
SAQA	South African Qualifications Authority
SARS	South African Revenue Service
SDA	Skills Development Act, 1998 (Act No. 97 of 1998, as amended)
SDLA	Skills Development Levies Act, 1999 (Act No. 9 of 1999, as amended)
SETA	Sector Education and Training Authority
SDF	Skills Development Facilitator
SME	Small and Micro Enterprise
SMS	Seta Management System
SP	Strategic Plan
SSP	Sector Skills Plan
WIL	Work Integrated Learning
TVET	Technical and Vocational Education and Training
WSP	Workplace Skills Plan

2. Definitions

Acts, for the purpose of the Policy, specifically means the Skills Development Act (Act No. 97 of 1998, as amended), the Skills Development Levies Act, (Act No. 9 of 1999, as amended), Public Finance Management (Act No. 1 of 1999, as amended) and related regulations.

Adult, in education and training, means a person who is sixteen years or older and entered into post-school programmes for the purpose of lifelong learning.

Adult Education and Training (AET), for the purpose of the Policy, means the learning programmes for adults, registered on the NQF. And located in the sub-framework of the UMALUSI Quality Council. The programmes include: Adult Basic Education and Training (ABET), at ABET Levels 1 to 4. ABET Level 4 is equivalent to Grade 9 (NQF Level 1);

- General Education and Training Certificate for Adults (GETCA) at NQF Level 1;
- National Senior Certificate for Adults (NASCA) at NQF Level 4;

For the purpose of the Policy, AET could also include:

- Artisan Training and Recognition Agreement for the Metal Industry (ATRAMI);
- Automobile Manufacturing Industry Certificate (AMIC), and
- Non-credit bearing short courses.

Apprenticeship means a learnership (refer to the “learnership” definition below) in respect of a listed trade and includes a trade test, in respect of that trade in accordance with the SDA, as amended.

Artisan means a person that has been certified as competent to perform a listed trade in accordance with the SDA, as amended.

Artisan Recognition of Prior Learning (formerly known as “Section 28”) means the principles and processes through which prior knowledge, skills and work experience of a person are made visible, mediated and assessed for the purpose of alternative access and admission for trade test certification/ qualification.

Annual Training Report means an annual report, which must be submitted by employers to qualify for mandatory grants, and reports on employees trained and developed in the previous levy year.

Bursaries, - employed for the purpose of the Policy, means "study grants" for employed learners to enrol at further, and higher education and training institutions, on programmes

relevant to the priority skills required in the manufacturing and engineering sector. Bursaries are not automatically renewed on an annual basis.

Discretionary Grants means funding allocated by the SETA to encourage member companies to implement programmes and projects to achieve the goals and objectives of the National Skills Development Plan NSDS III, the Sector Skills Plan (SSP), Strategic Plan (SP) and Annual Performance Plan (APP).

Employers, for the purpose of the Policy, means formally registered businesses and organisations, contributing skills development levies to the merSETA. "Employers" could also include levy-exempted companies and organisations.

Experiential Learning, for the purpose of the Policy, means the compulsory work-integrated learning curriculum requirement to obtaining the full qualifications, that forms part of the accredited National Diplomas in Engineering. Students must complete a minimum of two academic semesters of "experiential learning" in industry, under the supervision of a qualified mentor. The experiential learning periods are generally known as "P1 and P2".

Internships, for the purpose of the Policy, means relevant post-qualification work experience, of a minimum duration of one year, towards developing applied practice, knowledge and skills for the purpose of possible professional registration, career or further learning opportunities and could include "candidacies".

Labour/Employee Skills Development Facilitator means a representative from organised labour, representing the workplace and appointed by a recognised trade union to serve on the training committee or signs off on the mandatory and discretionary grant submission.

Learnership means a work-integrated learning programme that leads to a NQF-registered qualification. Learnerships are directly related to an occupation or field of work. Learnerships are based on legally binding agreements between an employer, a learner and a skills development provider. Once the qualification has been completed successfully, the learnership will also end. Terminology applicable to learnerships include, but is not limited to:

- **Learner** includes an apprentice, and
- **Learnership** includes an apprenticeship.

Learning Programme means a learnership, an apprenticeship, skills programme or any other prescribed learning programme, which includes a structured work experience component.

Trade-related learnerships, towards fully qualified artisan status, means the completion of NQF Levels 2 to 4 trade-related learnerships, and subsequently obtaining a trade test certificate in recognition as an artisan.

Management Committee (MANCO) means the committee comprising of the Executive Management of the merSETA, under the leadership of the Chief Executive Officer (CEO).

Mandatory Grants means the legislated percentage funds, designated to support the implementation of education and training programmes contained in the respective Workplace Skills Plans (WSPs), and Annual Training Report (ATRs) of legal entities in the SETAs' sub-sectors.

Memorandum of Agreement (MoA) means a legal agreement concluded between two or more parties for the execution of agreed project objectives, setting out the terms and conditions of the agreement.

Non-credit bearing short course means a short learning programme where credits are not awarded. Non-credit bearing short courses could only be funded through mandatory grants, or as non- PIVOTAL programmes.

Non-PIVOTAL Programmes means credit and non-credit bearing interventions. Non-credit bearing interventions that do not lead to qualifications must still address the key objectives and priorities of merSETA.

Other Legal Entities mean legal persons or enterprises, duly registered, inclusive of co-operatives, civil society organisations, non-profit organisations, international organisations and public or institutions. National, provincial and local government departments, recognised trade unions, eligible to receive discretionary grants in terms of section 6 (7) and section 6 (10) of the Grant Regulations (published under Gazette no 35940) are also included in this category.

Partnerships means a contractual arrangements between one or more parties where the parties agree to a common education, training and/or skills development purpose, aligned to national and sector specific strategic imperatives. Partnerships includes Public Private Partnerships, as prescribed in the PFMA 1 of 1999.

PIVOTAL programmes means professional, vocational, technical and academic learning programmes that result in qualifications, or part qualifications registered on the NQF.

Private Education and Training Providers means non-public providers, compliant in terms of legislative requirements and registrations for the purpose of participation in skills development activities pertaining to the Policy.

Public Education and Training Institutions, for the purpose of the Policy, means:

- Public Higher Education Institutions
- Technical High Schools
- Public TVET Colleges, and
- Community Education and Training Colleges.

Programmes means strategic imperatives consisting of one or more projects or partnerships related to strategic imperatives in the merSETA's Strategic Plan (SP), and Annual Performance Plan (APP).

Projects means any undertaking with a defined, strategically aligned scope of work, a clear start and end point, and time-bound deliverables to achieve a unique goal within a defined deliverable schedule, inclusive of activities, reporting and monitoring and evaluation requirements.

Public/Private Partnerships means arrangements between public institutions and/or public entities and/or national, provincial or local government, with private sector enterprises to share responsibilities and contributions in implementing development projects and programmes.

Recognition of Prior Learning means the principles and processes through which prior knowledge and skills of a person are made visible, mediated and assessed for the purpose of alternative access and admission, recognition and certification, or for further learning and development.

Scarce skills means occupational skills which are in demand but for which there are none available in the labour market.

Sign-off means an electronically signed agreement between an employer and a recognised trade union(s), about the identified skills development interventions referred to in the mandatory grant applications. This applies to enterprises or companies where a

recognition agreement exists with trade unions, or alternatively, employee representatives in companies who employ 50 or more people, and do not have a recognition agreement with trade unions.

Skills Development Providers means accredited providers of occupational learning programmes.

Skills Programmes means a cluster of one or more unit standards towards credit accumulation and transfer, to obtain a NQF-registered qualification. For the purpose of the Policy, the merSETA and other SETA criteria for registered skills programmes will be applicable.

Skill Sets means a clustered range of skills required by a qualified person or a person already doing a task or job for the purpose of trans-skilling, re-skilling or up-skilling in relation to industry needs, and is linked to more than one NQF qualification. For the purpose of the Policy, the merSETA and other SETA criteria for skill sets will be applicable.

Strategic Projects means ongoing initiatives and interventions that are intended to address national imperatives, as detailed in the merSETA Strategic Plan (SP) and Annual Performance Plan (APP).

Training Committee means an established committee comprising of the employer and employee representatives for the purpose of active participation in skills development interventions, in companies who have a recognition agreement with trade unions, or employ 50 or more employees who do not have a recognition agreement with trade unions.

Verification for the purpose of this Policy, means the process of ensuring that companies and other legal entities, applying for mandatory and discretionary grants, meet the requirements for training and development.

Workplace Skills Plan (WSP) means a plan, which must be submitted by an employer to qualify for mandatory grants.

3. Purpose

3.1 The purpose of this policy is to:

3.1.1 Provides rules and guidelines for the application of mandatory and discretionary grants

3.1.2 Set out conditions for verification, evaluation, approval and monitoring for both mandatory and discretionary grant process

3.1.3 Provides incentives to employers to plan and implement training for their employees

3.1.4 Allow the merSETA to collect data on the workforce and skills needs, and

3.1.5 Provide institutional framework for stakeholders to contribute to the achievements of the NSDS III goals and objectives, the merSETA Sector Skills Plan (SSP), Strategic Plan (SP) and Annual Performance Plan (APP).

4. Policy Statement

4.1 The Grant Policy has been developed in support of the merSETA's mandate as per the Skills Development Act (Act No. 97 of 1998) and strategic imperatives of all social partners – employers, workers, communities and government.

4.2 Programmes must clearly link to the organisations' priorities, strategic priorities of the merSETA Sector Skills Plan, the merSETA Strategic Plan, and merSETA Annual Performance Plan.

4.3 Programmes must address developmental and transformative imperatives, meeting social and economic demand, whilst addressing targets for race, gender, and people with disability, youth, township and rural communities.

5. Scope

5.1 This policy applies to all the divisions of the merSETA and all role players, public and private, in the merSETA's skills eco-system, participating in the implementation of merSETA strategy. Partnerships and collaborations are seen as a critical mechanism for delivery of projects, and therefore the strategy of the merSETA. Role players are inclusive of, but not limited to legal persons or enterprises as per Section 6 (7) and (10) of the Grants Regulations, employer associations, labour organisations, research institutes, international partners such as international development agencies, and international learning and research organisations/institutions legally constituted in their country of origin.

- 5.2 The merSETA will open a dedicated funding window for mandatory and discretionary grants, and window for the submission of applications for discretionary grant-funded project proposals, addressing the merSETA's strategic imperatives. Project proposals will be subject to an approval process, inclusive of a final MANCO decision.

6. Authority and Governance

- 6.1 The accountability will remain with the Accounting Authority (AA) and the Chief Executive Officer (CEO).
- 6.2 The Executive Management will be responsible for compliance and implementation, in accordance with this Policy.
- 6.3 The Chief Operations Officer (COO) will be responsible for the review of the Policy.

7. Legislative and Regulatory Requirements

- 7.1 This Policy derives its authority from the following legislation, applicable regulations, including amendments:
- 7.1.1 The Public Finance Management Act (Act No. 1 of 1999) and applicable regulations
 - 7.1.2 The B-BBEE Act (Act No. 3 of 2003) and Codes of Good Practice
 - 7.1.3 The Skills Development Act (Act No. 97 of 1998)
 - 7.1.4 The Skills Development Levies Act (Act No. 9 of 1999)
 - 7.1.5 The Grants Regulations 3 of December 2012
- 7.2 This policy must be read in conjunction with the following related merSETA policies:
- 7.2.1 Delegations of Authority Guideline (Ref: CGD-GL-003)
 - 7.2.2 Discretionary Grants Projects Policy (Ref: PMO-PL-002), and
 - 7.2.3 Monitoring and Evaluation Policy (Ref: MAE-PL-001).

8. Principle of the Policy

8.1 Strategic Projects

- 8.1.1 merSETA Management can initiate strategic projects, approved by MANCO and implemented by MANCO's chosen partners, following a specific evaluation and approval procedure for management-initiated strategic project(s).
- 8.1.2 International knowledge exchange and/or skills transfer projects are considered, evaluated and approved, following specific procedures for international knowledge exchange and/or skills transfer projects.
- 8.1.3 Any other project that is of national priority, as per the National Development Plan, will be evaluated and approved by MANCO in accordance with the specific procedure for such projects.

8.2 Levy Collection

- 8.2.1 The South Africa Revenue Service (SARS) collects the skills development levy on behalf of the Department of Higher Education and Training (DHET). The DHET distributes eighty percent (80%) of the collected levies to the respective SETAs and twenty percent (20%) is distributed to the National Skills Fund
- 8.2.2 SETAs may use a maximum of 10.5% of the total levy income per financial year, as per the Skills Development Levies Act (Act No. 9 of 1999) and regulations, towards administration costs.
- 8.2.3 The SETA will make available maximum of 0.5% of the administrative levy to the Quality Council for Trades and Occupations (QCTO).
- 8.2.4 A maximum of 7.5% of the allocated discretionary grants may be utilized by the merSETA for administrative costs, for the delivery and implementation of the merSETA discretionary grant initiatives, in accordance with this Policy.

8.3 Mandatory Grants

- 8.3.1 The merSETA will only accept online submissions made on the National Skills Development Management System (NSDMS).

- 8.3.2 The merSETA will develop the detailed procedure for application, submission, allocation and monitoring of both Mandatory and Discretionary grants.
- 8.3.3 Mandatory grant applications will be available from 1 February until 30 April every year. All levy-paying companies can apply for PIVOTAL, as well as Non-PIVOTAL programmes during the submission period.
- 8.3.4 All merSETA levy-paying companies, with a payroll above the regulated threshold, should submit their PIVOTAL plans together with the mandatory grant applications, in order to access discretionary grants.
- 8.3.5 The merSETA non-levy paying companies, and other legal entities implementing programmes within the merSETA sector that are not required to submit mandatory grant applications, may apply for PIVOTAL programmes through the discretionary grant window application process, which will be opened on 1 February until 30 April each year, or any other funding window period, available during the financial year.
- 8.3.6 It is compulsory for large and medium companies to submit their mandatory grant applications, in order for the merSETA to consider their PIVOTAL application for discretionary grants.
- 8.3.7 The CEO reserves the right, based on a Delegation of Authority Guideline (Ref: CGD-GL-003) to grant a one-month extension in line with the grant regulation, where there are written submissions.
- 8.3.8 Employers, who signed recognition agreements with a trade union or unions, must provide evidence in the form of minutes from a minimum of two meetings wherein the WSPs and ATRs have been subject to consultation with the recognised trade unions, and the WSPs and ATRs have been signed off by the labour representative appointed by the recognized trade union, unless an explanation has been provided.
- 8.3.9 Companies employing 50 or more employees, who do not have a recognition agreement with labour must appoint an employee SDF to sign off on the grant application. The employee SDF must be a member of the training committee. The merSETA reserves the right to verify the authenticity of this information

8.4 Discretionary Grants

- 8.4.1 Discretionary grants are allocated at the sole discretion of the merSETA, based on the delegation of authority by the Accounting Authority, to achieve the merSETA's objectives in relation to the development of the sector.
- 8.4.2 Discretionary grant applications to be submitted from 1 February until 30 April every year.
- 8.4.3 Learning interventions, funded through the mandatory grant funding process, shall not be funded from discretionary grant funding.
- 8.4.4 The merSETA discretionary grants, in terms of this policy, will be inclusive of funding available from the following sources:
 - 8.4.4.1 Surplus administration funds
 - 8.4.4.2 Unclaimed mandatory grants
 - 8.4.4.3 Interest and penalties received
 - 8.4.4.4 Interest earned on investments
 - 8.4.4.5 Any other money received by merSETA in terms of Section 14 of the SDA, and
 - 8.4.4.6 The applicable percentage of the total levies paid by the employers during the financial year, in terms of section 3 (1) of the Skills Development Levies Act.
- 8.4.5 Discretionary grants will be considered according to the value of the company's 49, 5% levy contribution. In the event that the planned PIVOTAL Programmes amount exceed the company's 49, 5% levies, additional funding will be considered.
- 8.4.6 The merSETA allocates discretionary grants according to the categories below, and uses 49.5% value of levies received as the guide on PIVOTAL grant allocation:
 - 8.4.6.1 Platinum category will be allocated grants up to 2X 49.5% of the levy contributed, and additional allocation will be considered on a partial funding up to the value of 49.5%.
 - 8.4.6.2 Gold category will be allocated grants up to 1X 49.5% of the levy contributed and additional allocation will be considered on a partial funding up to the value of 49.5%.
 - 8.4.6.3 Silver category will be allocated grants up to 1X 49.5% of the levy contributed and additional allocation will be considered on a partial funding up to the value of 0.5 x 49.5%.

- 8.4.6.4 Non-levy paying (exempted), and levy paying companies where 49.5% levy is below R 165,000.00, will be allocated a grant equivalent to R165,000.00 and a further additional allocation up to a maximum of R82, 500.00, on condition that they register learners to the same value.
- 8.4.7 The merSETA's levy-exempted companies and all other legal entities that have not submitted WSP, ATR, PIVOTAL plans, Non-PIVOTAL plans and PIVOTAL reports during the mandatory grant submissions, will have an opportunity to apply for discretionary grants for PIVOTAL and Non-PIVOTAL programmes during the funding window, which will open on 1 February and close on 30 April of each year, unless a one month extension has been granted or any other funding window opened during the year.
- 8.4.8 Partnerships/Project/s collaborations can be received from other legal entities, including but not limited to Government Departments, State Owned Entities, International Organisations, HEI and TVETs through an engagement with the merSETA outside the discretionary grant funding window. These applications will be viewed as Strategic proposals that will meet the NSDS and SETA priorities. From time to time merSETA will make a public call for such proposals to be submitted for consideration.
- 8.4.9 PIVOTAL programmes allocated to other legal entities will be aligned to the grant policy and Non-PIVOTAL allocation, and may differ depending on the engagement and criteria approved by MANCO.
- 8.4.10 Priority will be given to the scarce skills identified in the merSETA SSP and APP.
- 8.4.11 All applications must be in respect of learners who are in possession of a valid South African Identity document, except for the Training Lay-off Scheme.
- 8.4.12 The merSETA will set the criteria for performance on previous discretionary grants allocated, which will be approved by MANCO. The Discretionary Grant criteria will be made available to stakeholders on the merSETA website.
- 8.4.13 Companies and organisations not meeting the criteria for that particular year may not be considered for funding.

- 8.4.14 The merSETA will allocate discretionary grants for PIVOTAL programmes according to the funding formula and values on the Allocation Criteria and Guideline. The MANCO will approve the Criteria and Guideline in line with DHET funding guidelines.

8.5 Non-PIVOTAL Programmes

- 8.5.1 The merSETA may, from time to time identify special projects with a specific scope, rules and deliverables. The call for the intention to participate will be published as the need arises.
- 8.5.2 All discretionary funds, disbursed in support of non-qualification-based projects in the manufacturing sector, will not constitute more than 20% of discretionary funds disbursed in each financial year.
- 8.5.3 The MANCO will exercise discretion when approving funding for Non-PIVOTAL programmes and interventions.

8.6 Grants Appeal Process

- 8.6.1 Where an appeal is to be lodged in respect of a mandatory or discretionary grant application, an outcome must be submitted in writing, within 14 days of receipt of the outcome notification to the CEO at (dgmoa@merseta.org.za), detailing the reasons for the appeal..
- 8.6.2 The merSETA will investigate the matter relating to the dispute and will provide feedback to the relevant parties within 30 days of receipt.
- 8.6.3 The decision of the CEO will be final.

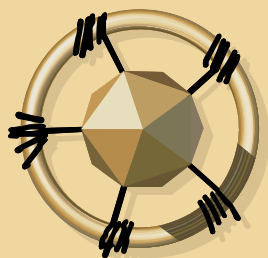
9. Policy Review

The policy will be reviewed every two (2) years or as per operational and strategic changes and monitored in line with merSETA Quality Management System, based on ISO 9001:2015 for effective implementation.

NOTES

NOTES





merSETA

MANUFACTURING, ENGINEERING
AND RELATED SERVICES SETA

GAUTENG SOUTH (HEAD OFFICE)

merSETA House, 95 7th Avenue
Cnr Rustenburg Road, Melville, Johannesburg 2109
Tel: 010 219 3000 • Fax: 086 673 0017

OFFICES EASTERN CAPE

Pickering Park Office Suites, 14-20 Pickering Street
Newton Park, Port Elizabeth 6045
Tel: 0861 637 734 • Fax: 086 673 0017

GAUTENG SOUTH

merSETA House, 95 7th Avenue
Cnr Rustenburg Road, Melville, Johannesburg 2109
Tel: 010 219 3000 • Fax: 086 673 0017

GAUTENG NORTH & NORTH WEST

Automotive Supplier Park, 30 Helium Road, Rosslyn Ext. 2
Tel: 0861 637 731 • Fax: 086 673 0017

FREE STATE & NORTHERN CAPE

46 Second Avenue, Westdene, Bloemfontein 9300
Tel: 0861 637 733 • Fax: 086 673 0017

KWAZULU-NATAL

149 Essenwood, 149 Stephen Dlamini Road
Musgrave, Durban
Tel: 0861 637 736 • Fax: 031 201 8732

LIMPOPO & MPUMALANGA

Section 1 No. 8 Corridor, Crescent Route N4
Business Park Ben Fleur Ext 11, Witbank
Tel: 0861 637 735 • Fax: 086 673 0017

WESTERN CAPE

5th Floor, Catnia Building, Bella Rosa Office Development
Bella Rosa Road, Tygervalley
Tel: 0861 637 732 • Fax: 086 673 0017



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