

GRANT CRITERIA AND GUIDELINE

2021/22

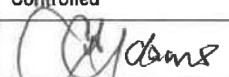
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1. ACRONYMS

AA	- Accounting Authority
ABET	- Adult Basic Education and Training
AET	- Adult Education and Training
AMIC	- Automobile Manufacturing Industry Certificate
APP	- Annual Performance Plan
ARPL	- Artisan Recognition of Prior Learning
ATR	- Annual Training Report
CBOs	- Community-based Organisations
CEO	- Chief Executive Officer
CETC	- Community Education and Training College
CHE	- Council for Higher Education
COO	- Chief Operations Officer
DHESI	- Department of Higher Education, Science and Innovation
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
NPC	- Non-Profit Company
NPO	- Non-Profit Organisations
NPP	- Non-Pivotal Plan
NQF	- National Qualifications Framework

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NSDMS	- National Skills Development Management System
NSDP	- National Skills Development Plan 2030
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)
SDF	- Skills Development Facilitator
SDLA	- Skills Development Levies Act, 1999 (Act No. 9 of 1999, as amended)
SETA	- Sector Education and Training Authority
SME	- Small and Micro Enterprise
SMS	- Seta Management System
SP	- Strategic Plan
SSP	- Sector Skills Plan
TVET	- Technical and Vocational Education and Training
WIL	- Work Integrated Learning
WSP	- Workplace Skills Plan

***Acronyms** are non-exhaustive and will be supplemented from time to time.

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*The document shall be revised at least 3 months before next revision date or as per merSETA organisational and operational changes.

2. DEFINITIONS

The below definitions are not exhaustive and may from time to time be reviewed.

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 (Act No. 1 of 1999, as amended) and related Acts and Regulations.

Adult in education and training, means a person who is sixteen years (16) or older and entered into post-school programmes for the purpose of lifelong learning.

Adult Education and Training (AET) means education, training, and skills development for adults, including formal, non-formal and informal learning to improve knowledge and skills for personal development, further learning and/or employment.

Apprenticeship means a workplace-based learning programme culminating in an occupational qualification for a listed trade.

Artisan means a person certified as competent in a listed trade in accordance with the relevant legislation, informed by the Skills Development Act (Act No. 97 of 1998, as amended).

Artisan 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 for trade test certification.

Annual Training Report means a report on the implementation of an organisation's Workplace Skills Plan (WSP), wherein it reports on the education and training interventions that were delivered in the previous year.

Blue Economy means manufacturing of tools and process that will contribute to sustainable use of ocean resources for economic growth.

Broad-Based Black Economic Empowerment means an economic system structured and transformed to enable the meaningful participation of the majority of its citizens and to further create capacity within the broader economic landscape at all levels through skills development, employment equity, socio economic development, preferential procurement, enterprise development, especially small and medium enterprises, promoting the entry of black entrepreneurs into the mainstream of economic activity, and the advancement of co-operatives.

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Bursaries means study grants for students to enrol at continuing education and training colleges or higher education and training institutions on programmes relevant to the priority skills required in the manufacturing and engineering sector.

Circular Economy means an economic model that minimises resource inputs and waste generation in the mer-industry.

Community Education and Training College means a college established under the Continuing Education and Training Act No 16 of 2006, previously titled “Further Education and Training Act”, providing education and training programmes on a full, part time or distance learning basis that are aligned or lead to qualifications or part qualifications registered on level 1 to 4 of the NQF, which qualifications are quality managed by Umalusi.

Continuing Education and Training College means a public or private college established under the Continuing Education and Training Act No. 16 of 2006 as amended. Public colleges are established as technical and vocational education and training colleges or community education and training college by the Minister of Higher Education and Training. Private colleges are declared and registered (or provisionally registered) as colleges having first been incorporated or recognised as a company in terms of the Companies Act No. 71 of 2008 (“Companies Act”). Public and private colleges offer on a full or part time or distance learning basis continuing education and training programmes.

Continuing Education and Training means all learning and training programmes aligned to or leading to qualifications or part qualifications registered on level 1 to 4 of the NQF, provided at public or private continuing education and training colleges.

Co-operatives means forms of ownership registered in terms of the Co-operatives Act (Act No. 14 of 2005, as amended) and, for the purpose of this Policy, involved in skills development activities that are within or for the merSETA sector.

Critical skills mean skills and knowledge within an occupation that are required for the work/job tasks and activities of an occupation.

Discretionary Grants means funding allocated to incentivise or support education, training and skills development and related activities that will address skills development needs of the merSETA sector.

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Employers means companies that are registered in terms of Companies Act. Employers include levy paying and non-levy paying companies as defined and described in the Grant Regulations of 3 December 2012.

Employer associations means a body of employers, usually from the same sector of the economy, associated to further the interests of member companies such as conducting negotiations with trade unions, providing advice, making representations to other bodies.

Employee Skills Development Facilitator means a representative from a company where there is no recognition agreement, representing the workplace and appointed by the employees to serve on the training committee and signs off on the mandatory and discretionary grant submissions.

Entity means an organisation legally established in terms of relevant establishment laws such as the Companies Act, various education legislation, NPO Act No. 71 of 1997, Public Service Act No. 103 of 1994 ("Public Service Act") and the Constitution of the Republic ("Constitution") of South Africa 1996.

Funding Window means a public call made through open media platforms and publications for applications for mandatory and discretionary grants in accordance with the merSETA Grants Policy, related Grants Criteria and Guidelines and Grant Award Procedure.

Government Departments and Public Entities means national, provincial, and local government departments and public entities established in terms of the Public Service Act, Municipal Acts, the Constitution, governed by the Public Finance Management Act No. 1 of 1999 and Municipal Finance Management Act No. 56 of 2003 and participate in skills development related interventions within or for the merSETA sector.

Green Economy means manufacturing in a manner that reduces the amount of natural resources needed to produce finished goods through more energy and materials-efficient manufacturing processes.

Gold Category means the merSETA levy-paying entity categories for companies that are up to date with levies, having received mandatory grants payments and have an average pass rate of **60%** (sixty per cent) in the implementation of learning interventions.

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Silver Category means the merSETA levy-paying entity categories for companies that have limited participation in the skills development interventions of merSETA or never before worked with the merSETA.

Platinum Category means the merSETA levy-paying entity categories for companies, up to date with levies, having received mandatory grants payments for at least three years, and have an average pass rate of **80%** (eighty percent) and placement rate of **70%** (seventy percent) in implementation of learning interventions, including apprenticeships.

Higher Education Institution means a public or private institution established in terms of the Higher Education Amendment Act No. 9 of 2016 that provides higher education on a full-time, part-time or distance basis and may be a university, university college or higher education college as defined by the Act. Private higher education institutions must be first incorporated or recognised in terms of the Companies Act to be established and registered.

Intervention means an activity or combination of activities implemented to address the mandate and strategy of the merSETA. Interventions include but not limited to research, planning, evaluation, innovation, learning programmes, quality assurance of learning, strategic programmes projects and partnerships.

Industry 4.0 means the digitalisation of mer-industries which involves the use of digital tools and the impact on business processes, the organisation of work and the occupational profile of our mer-sector labour market.

International Partners mean entities, which include, but are not limited to international development agencies, international learning, and research institutions, legally constituted in their country of origin.

Post School Education means universities, universities of technologies, TVET and community colleges involved, in skill development activities within and for the merSETA sector. The skills development activities may include research or providing direct skills development support in rural and other prioritised socio-economic contexts.

International Government Partners means co-funding initiatives with other international government entities, which include, but are not limited to international

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development agencies, international learning, and research institutions, legally constituted in their country of origin.

Labour Skills Development Facilitator means a representative from organised labour, where a recognition agreement has been signed between business and labour, representing the workplace, and appointed by a recognised trade union, to serve on the training committee and signs-off on the Mandatory and Discretionary Grant submission. This is applicable to companies where recognition agreements exist, regardless of the number of employees.

Labour Organisations means an organisation, agency, committee, or group that represents the interests of employees by participating in activities such as conducting negotiations with employers, providing advice, making representations to other bodies.

Learnership means a workplace-based learning programme culminating in an occupational qualification.

Learning Programme means a structured and purposeful set of learning experiences that lead to a qualification or part-qualification, knowledge, skills and competencies. This may include learnerships, apprenticeships, skills programmes and any other prescribed programme that include a structured work experience component.

Legislation for the purpose of the Policy means the SDA, SDLA, PFMA and related Acts and Regulations.

Trade-Related Learnerships towards fully qualified artisan status means the completion of NQF Levels Two (2) to Four (4) trade-related learnerships and subsequently obtaining a trade test certificate through the artisan recognition of prior learning (ARPL) process.

Management Committee (MANCO) means the merSETA committee chaired by the CEO, comprising of senior members appointed in terms of Treasury Regulation 24.1 and responsible for decision-making in relation to the approved Delegation of Authority Framework of the merSETA.

Mandatory Grants means funds designated as Mandatory Grants as contemplated in Regulation 4 of the Grant Regulations, to fund the education and training programmes as contained in the Workplace Skills Plan and Annual Training Reports of levy paying companies.

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Memorandum of Agreement (MoA), means a legal agreement concluded between two (2) or more parties for the execution of agreed learning programmes and project objectives, setting out the terms and conditions of the agreement. Counterparties in this type of agreement may be those contemplated in Sections 6 (7) and (10) (a) to (d) of the Grants Regulations.

NGOs, CBOs, NPOs, NPCs means civil society organisations focused on public benefit and community development, registered with the Department of Social Development and involved in interventions that are within or for the merSETA sectors.

Non-Credit Bearing Short Course means a short learning programme where credits are not awarded. Non-Credit Bearing Short Courses could be funded through Mandatory Grants and grants for non-PIVOTAL programmes.

Non-PIVOTAL Programmes means credit and non-credit bearing learning interventions. Non-credit bearing learning interventions, not leading to qualifications or part qualifications, must still address the key objectives and priorities of merSETA. Non-PIVOTAL programmes also include but are not limited to research, evaluation, innovation, innovation projects and other non-learning delivery interventions core to the achievement of the merSETA mandate and strategy.

Other Legal Entities means legal persons or organisations, duly registered, inclusive of co-operatives, civil society organisations, non-profit organisations, international organisations, as well as public entities, public education and training institutions and recognised trade unions, eligible to receive Discretionary Grant funding in terms of Section 6(7) and Section 6(10) of the Grant Regulations (Government Gazette No. 35940).

Partnerships means contractual arrangements between one (1) 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.

Part Qualification means an assessed unit of learning that is registered on the NQF as a part qualification.

PIVOTAL Programmes mean professional, internship, vocational, technical and academic learning programmes that result in qualifications or part qualifications registered on the NQF. PIVOTAL programmes may include internships or professional programmes that culminate in SAQA recognised designations.

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Private Education and Training Providers means non-public providers or private education and training institutions registered as private higher education institutions or continuing education and training colleges or training centres established by private sector companies or employer associations. Private education and training providers must be compliant in terms of legislative requirements and registration for the purpose of participation in learning and skills development interventions pertaining to relevant policies of the DHET, CHE, Umalusi, QCTO and the merSETA.

Public Education and Training Institutions means Public Higher Education Institutions; Technical High Schools; Public TVET Colleges; and Public 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 SP and APP.

Projects means non-routine, temporary undertakings with 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 and reporting, and monitoring and evaluation requirements.

Public/Private Partnerships means a transaction between an institution of the state and private sector party.

Recognition of Prior Learning means the principles and processes through which the prior knowledge and skills of a person are made visible, mediated and assessed for the purposes of alternative access and admission, recognition and certification, or further learning and development (SAQA 2013: National Policy for the Implementation of RPL and Government Gazette 42319 of 19 March 2019)).

Research Institutes means, for the purpose of the Policy, institutes involved in research initiatives related to the merSETA sector.

Scarce Skills means occupations identified through sector-related research and labour market analysis, as in demand, but for which there is inadequate supply of appropriately qualified people.

Sign-off means a signed agreement between an employer and a recognised trade union(s) about the identified skills development interventions referred to in the grant applications. A sign-off could be an electronic sign-off. This applies to enterprises or companies where a recognition agreement exists with trade unions or alternatively,

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employee representatives in companies who employ 50 (fifty) or more people and do not have a recognition agreement with trade unions.

Skills Development Providers means an accredited learning programme that is occupationally based and which, when completed, may constitute credits towards a qualification registered on the NQF, as informed by the SDA.

Skills Programmes means an accredited learning programme that is occupationally based and which, when completed, may constitute credits towards a qualification registered on the NQF, as informed by the Skills Development Act (Act No. 97 of 1998, as amended).

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 according to the National Qualification Framework Act No. 67 of 2008.

Social Partners mean in terms skills development legislation, organised employers, organised labour, government, community and professionals brought together to cooperate in working relationships to achieve a mutually agreed upon goals to the equitable benefit of all social partners.

Strategic Projects means interventions that are intended to address strategic priorities of the merSETA, which include national or industry imperatives, as encapsulated in the merSETA SP and APP.

Strategy means the integrated planned presentation of merSETA strategic imperatives and obligations encapsulated in the sector skills plan, 5 (five) year strategic plan, annual performance plan and the DHET service level agreement. The AA is the custodian of the merSETA strategy, providing oversight and monitoring its implementation.

Student Internship - Category A (Formerly Experiential Learning, P1 and P2) means a period of workplace-based learning undertaken as part of the requirement for the Diploma, National Diploma, Higher Certificate or Advanced Certificate, as stipulated in the Higher Education Qualifications sub-framework of the NQF managed by the Council on Higher Education and SAQA.

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Student Internship - Category B means a period of workplace-based learning undertaken as part of the requirement for a professional designation, and candidacy in the merSETA means the same.

Student Internship - Category C means a period of workplace-based learning undertaken as part of the requirement for the Occupational Qualifications of the Trade and Occupations Sub-framework of the NQF managed by QCTO and the SAQA.

Training Committee means an established committee for the purpose of active participation in skills development learning interventions in companies for both those companies who have a recognition agreement with trade unions or those who employ **50** (fifty) or more employees and do not have a recognition agreement with trade unions.

Technical and Vocational Education and Training College means a college established under the Continuing Education and Training Act No 16 of 2006, providing education and training programmes that lead to qualifications or part qualifications registered on level **2** (two) to **4** (four) of the National Qualifications Framework, which are quality managed by Umalusi. TVET colleges may accredited by the QCTO as skills development providers to provide programmes leading to occupational qualifications of the Trades and Occupations Sub-framework of the NQF as well as programmes at level **5** (five) of the Higher Education Sub-Framework of the NQF under a certification agreement with a higher education and training institution.

Verification for the purpose of this Policy means the process of ensuring that all eligible organisations applying for mandatory and, discretionary grants, meet the requirements for the awarding of grants.

Workplace Skills Plan (WSP) means a strategic document that articulates how an employer intends to address the training and development needs in the workplace during a forthcoming year.

** All terminology not defined above shall bear the same meaning as in the applicable legislation.*

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3. PURPOSE

The purpose of the merSETA Grant Criteria is to set out conditions, rules, and standards for:

- 3.1 The application, awarding and management for Mandatory Grants (MG) and Discretionary Grant (DG) funds.
- 3.2 Grant allocation for the Professional, Vocational, Technical and Academic Learning (PIVOTAL) and non-PIVOTAL interventions.
- 3.3 Evidence required for payment claims upon progress and completion agreed milestones.

4. PRINCIPLES OF THE GUIDELINE

- 4.1 **Transparency:** The merSETA conducts grant funding processes in a manner that is honest, open, ensuring access to information whilst guided by the laws of the Republic of South Africa.
- 4.2 **Accountability:** The merSETA conducts grant funding processes in a manner that demonstrates its obligation to responding to the needs of its stakeholders and beneficiaries.
- 4.3 **Inclusivity:** The merSETA supports structural economic transformation that promotes an inclusive growth agenda; transformation in terms of control and ownership; and demographic transformation of the labour market with respect to issues such as race, gender, differently abled people, youth, and township and rural communities.
- 4.4 **Ethics:** The merSETA conducts grant funding processes in manner that is professional, unbiased, fair, equitable and recognises the diversity and dignity of its stakeholders and beneficiaries.
- 4.5 **Conflict of Interest:** The merSETA conducts grant funding processes in a manner that promotes the interests and needs of its stakeholders and beneficiaries through best practice governance oversight and monitoring.
- 4.6 **Fairness and Progressiveness:** The merSETA allocate grant funding in a manner that promote fairness and progressive thinking which considers the economic environment. The merSETA will consider grant increases from current committed grants as and when grant values are increased.

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5. DISCRETIONARY APPLICATION AND AWARD

5.1 Application for merSETA Discretionary Grants

- 5.1.1 The merSETA will open dedicated funding window(s) for Discretionary Grants (DG) and Mandatory Grants (MG) application.
- 5.1.2 Discretionary Grant applications for projects and programmes will be subjected to an evaluation, verification and to an approval process.
- 5.1.3 With respect to implementing learning programmes, both credit bearing and non-credit bearing, entities intending to apply for multi-year intakes, the merSETA could allow for the submission of PIVOTAL and Non-PIVOTAL Plans for Discretionary Grant-funded interventions, showing three-year intake targets, which could be financially committed on an annual basis, in line with the three-year target setting.
- 5.1.4 Unless stated in the discretionary grant application advertisement, all discretionary grant applications will be received through the National Skills Development Management System (NSDMS). No application will be accepted through any other means other than the modality stipulated in the advertisement notice.
- 5.1.5 Unless stated in the discretionary grant application advertisement, all discretionary grant applications will be received through the NSDMS. No application will be accepted through any other means other than the modality stipulated in the advertisement notice.

5.2 Discretionary Grants allocation

- 5.2.1 Discretionary Grants are allocated at the sole discretion of the merSETA.
- 5.2.2 Learning interventions, funded through the Mandatory Grant funding process, shall not be funded from Discretionary Grant funding.
- 5.2.3 Discretionary Grant allocation will be allocated in line with the grant policy and availability of funds.
- 5.2.4 Discretionary Grant allocation for levy-paying companies will be aligned to a determined percentage of the levy contribution of the applying entity. (See more details in company categories section).
- 5.2.5 Additional funding could be considered, over and above the funding referenced in

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5.2.4 clause above, provided the request is aligned to merSETA priorities and availability of funds.

5.2.6 Applicants are encouraged to align application to the priority indicators as outlined in the merSETA Annual Performance Plan obtainable at merSETA website.

6. PRIORITY INTERVENTIONS

6.1 The merSETA's grant funding targets pertaining to PIVOTAL, NON-PIVOTAL interventions aligned to merSETA strategic priorities, as identified in the Sector Skill Plan (SSP), Strategic Plan (SP), Annual Performance Plan (APP) and National Skills Development Plan (NSDP) 2030 outcomes.

6.2 PIVOTAL interventions include: learnerships, apprenticeships, bursaries, skills programmes, skills set, Individual modules (Occupational certificates), part qualification (Quality Council for Trades and Occupations (QCTO)) modularized qualification), graduate internships (Technical and Vocational Education and Training (TVET)) Colleges, Universities of Technology and Universities) and student internships (Categories A, B and C).

6.3 Entities eligible to apply for discretionary grant funding to undertake PIVOTAL interventions include but not limited to: Employer companies, Non-Governmental Organisations (NGOs), Non-Governmental Organisations (NPOs), Community-Based Organisations (CBOs), Non-Profit Company (NPC), Public Education and Training Institutions, Government partnership and public entities.

6.4 The merSETA may also initiate international partnerships for the benefit of the local industry.

6.5 Applications for funding of PIVOTAL interventions are submitted following an official notice from merSETA published in public platforms (Newspapers) including the merSETA website. The application notice determines the application submission method as well as submission deadline. Any application that does not comply with the application notice will automatically be disqualified.

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7. DISCRETIONARY GRANT VALUES PER INTERVENTION

PIVOTAL PROGRAMMES/ INTERVENTIONS	ESTIMATED VALUE
NQF Level 2 to 4 learnerships ending in a trade test: trade-related learnerships where the learner will move to the next level of the learnerships when competent. When the learner is declared competent on Level 4, the learner will undertake the relevant trade test.	<p>R206 290.00 up to the value of 49.5% of levy contributed payable in tranches for the duration of the training programme per learner until successful completion of the trade test. Should a learner not undertake a trade test the value of R 2,187.17 will be deducted from the final tranche payment.</p> <p><u>Bonus grants for people with disabilities</u> R20, 625.00 per learner (proof to be submitted on registration)</p>
QCTO modularised qualification certificates Learnership Level 1 Learnership Level 2 Learnership Level 3 Learnership Level 4 or higher	<p>R45 420, 25 payable in tranches for the duration of the training programme per learner until successful completion. This grant includes the R21 998, 75, 00 per annum learner allowance.</p> <p>R56 837, 81 payable in tranches for the duration of the training programme per learner until successful completion. This grant includes the R33 002, 50 per annum learner allowance.</p> <p>R67 838, 67 payable in tranches for the duration of the training programme per learner until successful completion. This grant includes the R44 003, 46 per annum learner allowance.</p> <p>R206 290.00 up to the value of 49.5% of levy contributed payable in tranches for the duration of the training programme per learner. This grant value is applicable if credits are over 540. If less than 540 credits the grant value is R78 839, 55. This grant includes the R55 004, 33 learner allowance per annum.</p>
Apprenticeships	<p>R 206 290.00 up to the value of 49.5% of levy contributed payable in tranches for the duration of the training programme per learner until successful completion of the trade test.</p> <p><u>Bonus grants for people with disabilities</u> R20, 625.00 per learner (proof to be submitted on registration)</p>

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Learnerships (Historical registered qualifications unit standard-based)	<p>R23 835, 21 per learner per level. Plus additional learner allowances</p> <p>NQF L1 = R45 834 which includes the R21 998. 75 per annum learner allowance.</p> <p>NQF L2 = R56 837, 21 which includes the R33 002.50 per annum learner allowance.</p> <p>NQF L3 = R67 838, 67 , which includes the R44 003. 46 per annum learner allowance.</p> <p>NQF L4 or higher = R78 839. 53 which includes the R55 004,33 learner allowance per annum.</p> <p><u>Bonus grants for people with disabilities</u> R6 875.00 per learner (proof to be submitted on registration)</p>
Public TVET College Graduate Placements	A learner placed for six months for workplace exposure: R28 875,00
Graduate Development (Internships) University of Technology and University Graduates	Basic grant to company: R96 250.00 per annum per learner
Adult Basic Education and Training (ABET) at ABET Level 4, as well as the National Senior Certificate for Adults at NQF Level 4	Basic grant to company (Minumum of two subjects): R3,300.00 per subject
Bursaries at Higher Education and Training Institutions for permanently appointed employees at merSETA member companies for programmes that are 6 months or more.	Basic grant: R26 125, 00
Bursaries for TVET Colleges for permanently appointed employees at merSETA member companies.	Maximum grant of R26 125, 00 per learner. Actual payment will depend on the specific invoice amount of the TVET college.
Artisan Recognition of Prior Learning (ARPL) and Recognition of Prior Learning (RPL)	R50 420, 65 (total grant including pre-assessment, gap training and trade testing, where applicable)
Skills Programmes	R385.00 per credit per skills programme (One learner can do multiple skills programmes up to 80 credits. The grant value will be capped at the maximum of 80 credits). Where learners have undertaken skills programmes, which consists of less than 80 credits, the credits remaining, based on the maximum of 80 credits can be allocated to awarded skills programme learners, within the signed MoA. The grant is made up of R199.63 per credit

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	<p>for training and R185,37 per credit for a learner allowance.</p> <p><u>Bonus grants for people with disabilities</u> For skills programmes up to a maximum of 80 credits (pro rata payments for less than 80 credits), disability bonus is R4 583</p>
Skills Sets	<p>R385.00 per credit (only one programme per learner will be awarded. The grant value will be capped at the maximum of 80 credits for skills sets). Where learners have undertaken Skills Set which consists of less than 80 credits, the credits remaining, based on the maximum of 80 credits can be allocated to awarded Skills Set learners within the signed MoA, where the Skills Sets consist of more than 80 credits. The grant is made up of R199.63 per credit for training and R185, 37 per credit for a learner allowance.</p> <p><u>Bonus grants for people with disabilities</u> For skills sets up to a maximum of 80 credits (pro rata payments for less than 80 credits), disability grant value is R4 583</p>
Student Internship - Category A (formerly Experiential Learning, P1 and P2)	Basic grants to companies of R44 000.00 per learner, per semester (a semester is a six - month period). Where a learner has been placed to complete P1 and P2 such learner will be allocated a grant of R88, 000.00
Internship for N Diploma	Basic grants to companies of R96 250.00 per learner for the practical exposure for a minimum of 12 and maximum of 18 month period.
Credit Bearing Short Courses	R195.63. per credit (only one programme per learner will be awarded, up to a maximum of 120 credits.
Project management fee will be allocated at the discretion of merSETA and will be calculated at 7.5% of the total award.	

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8. CATEGORIES OF COMPANIES AND ESTIMATED ALLOCATION

- 8.1 This section only applies to the allocation of discretionary grants funding to employer companies. The merSETA has 3 employer categories: Platinum, Gold and Silver companies.

COMPANY CATEGORY	CRITERIA	ESTIMATED GRANT ALLOCATION CONSIDERATIONS
Platinum Top Training Clients	<p>For an employer to be categorized in the Platinum Category, employers would have met the following criteria:</p> <p>Must be merSETA levy-paying companies and up to date with levies.</p> <p>Have an average pass rate of 80% in implementation of learning interventions, including apprenticeships according to the company's training track record.</p> <p>It is important to note that an active training committee must be in place if the employer has 50 or more employees and where there is a recognized trade union or unions, they must form part of the training committee.</p> <p>2% of learners applied for and enrolled are persons with disabilities.</p> <p>Have a progress or placement average of 70%.</p> <p>Develop lecturers, public TVET Colleges initiatives, by indicating the availability of such workplaces to train such lecturers.</p> <p>Placements will be measured for a three- year period.</p>	<p>Platinum companies get 2 x 49.5% levies contributed.</p> <p>Maximum of 1 x 49.5% co-funding on condition that the company makes an additional 50% contribution to of the total value of the grant allocation in terms of learner enrolment.</p> <p>Where levies contributed are below 49.5% R206 290 a R206 290 fully funded will be granted</p> <p>Work-integrated learning or workplace learning for persons with disabilities can take place for primary or non-primary focused learning.</p>
Gold	<p>Must be a merSETA levy-paying company.</p> <p>Levies up to date.</p> <p>Average 60% Pass rate</p> <p>Minimum 2-year training track record</p> <p>Progress/ Placement average of 60%</p>	<p>1X 49.5% of the levy contributed fully funded.</p> <p>Plus additional <u>1 x 49.5%</u> co-funding</p> <p>Where levies contributed are below 49.5% R206 290 a R206 290 fully funded will be granted</p> <p>Work-integrated learning or workplace learning for persons with disabilities can take place for primary or non-primary focused learning.</p>

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Silver	Limited exposure to skills development Have never worked with the merSETA before, To including non- levy paying companies.	1 X 49.5% of the levy contributed fully funded. Where levies contributed are below 49.5% R206 290 a R206 290 fully funded will be granted Plus <u>0.5 x 49.5%</u> Co-funding
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- 8.2 Non-PIVOTAL Programmes means credit and non-credit bearing interventions. Non-credit bearing interventions, not leading to qualifications, must still address the key objectives and priorities of merSETA. Non-PIVOTAL programmes could also include research projects, innovation projects and other non-qualification related programmes, core to the merSETA strategy.
- 8.3 Entities eligible to apply for discretionary grant funding to undertake PIVOTAL interventions include but not limited to: Employer companies, NGOs, NPOs, CBOs, Public education and training institutions, Government partnership, public entities.
- 8.4 The merSETA may also initiate international partnerships for the benefit of the local industries.
- 8.5 Applications for funding of NON-PIVOTAL interventions are submitted following an official notice from merSETA published in public platforms (Newspapers) including the merSETA website. The application notice determines the application submission method as well as submission deadline. Any application that does not comply with the application notice will automatically be disqualified.

NON-PIVOTAL INTERVENTIONS	DESCRIPTION OF NON-PIVOTAL INTERVENTIONS
Lecturer Development	Learning interventions intended at promoting the growth of public TVET colleges by exposing TVET college lecturers to workplace experience.
Adult Education and Training (AET), previously known as Adult Basic Education and Training (ABET), at ABET Levels 1 to 3	Learning interventions addressing the low level of youth and adult language, numeracy, and other employability skills. The learning programmes may include an ABET or AET or Foundational Learning Certificate (FLC) or short courses.
Small and Micro Enterprise Development	Learning interventions to support and encourage the development of small and micro enterprises. The support may

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	include funding/ training/workshops/ short skills/ mentorship/ incubation/ online training.
NON-PIVOTAL INTERVENTIONS	DESCRIPTION OF NON-PIVOTAL INTERVENTIONS
Co-operatives, CBOs, NGOs	Learning interventions to support and encourage co-operatives, and CBO/NGOs. The support may include funding/ training/workshops/ short skills/ mentorship/ incubation/ online training.
Green Skills Development	Developing sustainable green skills for green-specific occupations, based on QCTO qualifications, or for supporting sustainable "green" values and skills through skills programmes, skill sets or QCTO-related part qualifications. Registered qualifications, skills programme and skills sets are supported through PIVOTAL programmes.
Worker Education and Training	Trade Unions in the merSETA Sector, for the benefit of educating and developing their members on skills development interventions, which form part of their duties as shop Stewards and beneficial to the merSETA sectors.
Innovation and Research Programmes and Projects	Interventions may include curriculum research and programme / qualification development projects for transforming/emerging/new occupations in demand.
Non-Credit Bearing Programmes	None-credit training will be planned on the WSP and reported on ATR. Non-credit bearing trainings will be funded as Non-PIVOTAL programmes for R1 227, 87 per day for training including stipend for maximum of 10 days.
Digital Learning Access Tool	R2 500 (Per Learner) , this grant is awarded to learners undergoing learning programmes which include Learnerships, skills programmes and apprenticeship where the programme delivery model integrate an online delivery modality or the combination of online and face to face interaction.
Anti Gender Based Violence and Sexual Harassment Programmes	Gender-based violence programme interventions will be funded through proposal submissions with a proposed budget. This grant is available for employers to implement GBV interventions in their workplace.
Career guidance projects/programmes	Career guidance interventions related to the mer Sector
Current and future skills	Interventions needed for development in technological advancement and digitalisation (4 th Industrial Revolution);
Support the imperatives contained within Job Summit Agreements	Interventions which include the temporary employee and employer relief scheme through delivery of flexible programmes that ensure that young people are suitably prepared and skilled to fill every entry level role, particularly where companies need to scale their operations, these may

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	include inter alia work readiness programme, short courses (accredited or non-accredited) that allow candidates to respond to changing economy
Rural development programmes targeting women, youth and people with disability	Interventions which support the implementation of rural development programmes for women, youth, and people with disability;
Revitalisation of rural township local economy	support the revitalisation of rural and townships to uplift local economy through skills development;

9. ENTITIES ELIGIBLE FOR DISCRETIONARY GRANT

9.1 Public and private entities within the manufacturing, engineering, and related services sectors are eligible for discretionary grant funding. The eligible entities include but not limited to:

9.1.1 Public education and training institutions (Universities, Universities of Technology, and TVETs), and public Community Education and Training Centres.

9.1.2 Public sector entities that implement programmes within the merSETA sector that meet allocation criteria.

9.1.3 An employer (Companies) or enterprise within the jurisdiction of merSETA, including an employer or enterprise not required to pay a skills development levy in terms of the Skills Development Levies Act.

9.1.4 Non-profit Organisations (NPOs inclusive of NGOs), and co-operatives that implements programmes within the merSETA sector that meet allocation criteria; and

9.1.5 Trade unions in the merSETA sectors, for the benefit of educating and developing their members through skills development-related programmes.

10. PAST PERFORMANCE AND DISCRETIONARY GRANT ALLOCATION

10.1 Past performance in PIVOTAL, non-PIVOTAL and Project awards will be considered in the evaluation and approval of new grant applications. The below performance criteria are applicable to entities that have previously received Discretionary Grant Funding for learning programme interventions.

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Discretionary Grant Window	Satisfactory Progression Criteria
DG Year 17	<ul style="list-style-type: none"> Agreements closed out with exception of approved extensions with signed addendums in place.
DG Year 18	<ul style="list-style-type: none"> Third tranche payment of all learning interventions have been paid. All short learning interventions (12 Months and less) have closed out.
DG Year 19	<ul style="list-style-type: none"> Second tranche payment of all learning interventions have been paid. All learning interventions to be closed out, except for learners on apprenticeships, NQF Level 2 to 4, bursaries and internships.
DG Year 20	<ul style="list-style-type: none"> First and second tranche payments for all learning interventions have been paid.
Withdrawal on previous funding.	<ul style="list-style-type: none"> Organisations that have withdrawn on 2 consecutive allocations will need to submit the motivation before further allocations are considered.

11. CONTRACTING AND COMMITMENT

11.1 Contracting will be done in the form of and signed agreement by all parties which stipulates the awarded interventions and funding value. The agreement stipulates the expected deliverables and performance targets and delivery timelines.

12. CONTRACT MANAGEMENT

- 12.1 Contract management will be carried out in line with the signed agreement and the grant recipient takes full responsibility for the implementation of the allocation and deliverables.
- 12.2 Projects which do not have learning programmes will be managed by a designated merSETA team.
- 12.3 Some projects as determined by the merSETA will have Steering Committees which will meet at regular intervals to monitor the implementation projects. The Steering Committees will have Terms of References outlining the terms of engagement for both parties.
- 12.4 The merSETA reserves the rights to terminate the agreement if the grant recipient has not adhered to the terms of the agreement.
- 12.5 For projects/programmes with learning intervention, the merSETA regional offices will play a critical role in monitoring, facilitate workplace approvals, and providing support to the grant recipient.

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13. EVIDENCE REQUIRED TO CLAIM PAYMENTS

- 13.1 Upon signing and return of the Memorandum of Agreement, a tranche payment is made to the grant recipient.
- 13.2 In a project which has learners, the grant recipient is required to register learners at the merSETA learner registration platform. The second tranche payment will be made according to the number of registered learners.
- 13.3 The third tranche payment of a project which has learners will be paid when the project has achieved a 50% progress milestone.
- 13.4 The fourth tranche payment of a project which has learners will be paid when the project has achieved 100% completion.
- 13.6 In other forms of projects, the payment schedule will be agreed with the grant recipient and forms part of the contract. The contract will stipulate the required deliverables to make a payment claim.

14. GUIDELINES FOR THE SUBMISSION OF MANDATORY GRANTS

- 14.1 An employer submitting the mandatory grant application must be a merSETA levy-paying company and must have submitted a Workplace Skills Plan (WSP), Annual Training Report (ATR), PIVOTAL Plan (PP), Non-PIVOTAL Plan (NPP) and PIVOTAL Report (PR), where applicable.
- 14.2 Where employers do not wish to participate in PIVOTAL and Non-PIVOTAL programmes during the specific reporting period, the PIVOTAL and Non-PIVOTAL Plan is optional.
- 14.3 The merSETA will not fund training for re-licencing purposes, undertaken as part of legislative requirements. Re-licensing forms part of an employer's legal obligations.
- 14.4 Mandatory grant amounts paid to employers for planned learning interventions may not be equal to the amount requested, in view of the value of mandatory grants that could be less than the training costs projected by the employer.
- 14.5 The merSETA will monitor the implementation of at least twenty percent (20%) of all mandatory grant submissions. The merSETA has the right to verify any report submitted. The verifications will be carried out by the Client Liaison Officer (CLO) in the respective regional office.

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- 14.6 Where a company has deviated more than forty percent (40%) from the previous year's workplace skills plan, the company is required to submit a motivation stating the reasons for the deviation. The sole reason for the use of the information contained in the deviation motivation would be to assess the trends in the workplace and the circumstances the employer and employees are experiencing.
- 14.7 Consideration will be given for the inclusion of training implemented and reported in the ATR, which was not specified in the WSP.
- 14.8 Where required, nominated employee/labour Skills Development Facilitators (SDF's) is required to be registered on the NSDMS by the primary SDF, against the specific company and must submit a signed authorisation document to the merSETA before access will be granted.
- 14.9 Where the nominated employee/labour SDF is not available to sign off on the application, alternate employee/labour SDFs must sign off on the application.
- 14.10 Where required, the employee/labour SDF is required to sign off electronically directly on NSDMS.
- 14.11 Where disputes have been declared, the employer must log the dispute and ensure that the information related to the dispute is uploaded against the "document upload tab", on or before the submission deadline.
- 14.12 Companies who submitted mandatory grant applications within the specified timeframe and have not met the minimum criteria listed below, may be requested to submit outstanding information by no later than 15 July of the financial year.
- Minimum criteria could include:
- 14.12.1 Clarification of sign-off by either the labour or employee SDF (whichever is applicable).
- 14.12.2 Outstanding labour or employee SDF signatories (whichever is applicable).
- 14.12.3 Proof that an inter-SETA transfer was approved, and the transfer has occurred prior to the mandatory grant submission deadline, and
- 14.12.4 Minutes of the Training Committee meeting/s.
- 14.12.5 It is important to note that the above will be the only information that will be considered after 30 April of the financial year.
- 14.13 Employers who fail to meet the prescribed criteria, outlined in this document, will forfeit their grant.

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- 14.14 Where the nominated employee/labour SDF is not available to sign off on the application, alternative employee/labour SDF must sign off on the application.
- 14.15 Where required, the employee/labour SDF is required to sign off electronically directly on NSDMS.
- 14.16 Where disputes have been declared, the employer must log the dispute and ensure that the information related to the dispute is uploaded against the "document upload tab, on or before the submission deadline.
- 14.17 It is important to note that the above will be the only information that will be considered after 30 April of the financial.
- 14.18 Employers who fail to meet the prescribed criteria, outlined in this document, will forfeit their grant.
- 14.19 Mandatory grants not claimed within the stipulated timeframe will be transferred to the discretionary grant by 15 August of the financial year.
- 14.20 The merSETA Chief Executive Officer (CEO), as the Accounting Authority's delegated representative, may grant an extension of a maximum period of one month from the submission date, as regulated. For the merSETA to consider the extensions, the extension request must be submitted electronically on the NSDMS on or before the 30 April deadline.

15. CRITERIA FOR THE APPROVAL OF MANDATORY GRANTS

- 15.1 The merSETA must allocate mandatory grants to the merSETA's levy-paying employers who submitted their applications on or before 30 April of the financial year and met the following criteria:
- 15.1.1 Submitted and implemented a Workplace Skills Plan and Annual Training Report, PIVOTAL Plan (PP), Non-PIVOTAL Plan (NPP) and a PIVOTAL Report (PR), where applicable, in the required format.
- 15.1.2 Registered for the first time in terms of the Skills Development Levies Act and applied for a mandatory grant within six months of registration.
- 15.1.3 Levy payments are up to date.
- 15.1.4 Employers who have recognition agreements with a trade union or unions, must provide evidence that the WSPs and ATRs have been subjected to consultation with the recognized trade unions in the form of training committee minutes and the WSPs

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and ATRs must be signed off by the labour SDF appointed by the recognized trade union, unless an explanation could be provided.

- 15.1.5 Employers who have no recognition agreement and have 50 or more employees, must provide evidence that the WSPs and ATRs have been subjected to consultation with the nominated employee SDF in the form of training committee minutes and the WSPs and ATRs must be signed off by the employee SDF appointed by the employees within the organisation.

16. ADMINISTRATIVE REQUIREMENTS

- 16.1 It is the responsibility of the employer/organisation to supply the merSETA with the information relating to the banking details by submitting the information online.
- 16.2 The merSETA will validate requests for changes to banking details.
- 16.3 The merSETA reserves the right to request supporting documentation to verify compliance with the conditions of each project and/or grant rule/s prior to effecting payments.

17. MANDATORY GRANT APPLICATION PLATFORM

- 17.1 The merSETA will make the NSDMS available for electronic submissions.

18. COMMUNICATION CHANNELS WITH GRANT APPLICANTS AND RECIPIENTS

- 18.1 The merSETA will make use of the following communication channels:
- 18.1.1 The merSETA's website
- 18.1.2 Stakeholder publications
- 18.1.3 Newspapers
- 18.1.4 E-mail blitz
- 18.1.5 Skills Development Forums
- 18.1.6 Roadshows
- 18.1.7 Regional offices
- 18.1.8 All official merSETA meetings.

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19. GUIDELINE REVIEW

- 19.1 This Discretionary Grant Criteria guideline will be reviewed annually, or as per operational and strategic changes and requirements, and monitored in line with the merSETA Quality Management System, based on ISO 9001:2015 for effective implementation.

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*The document shall be revised at least 3 months before next revision date or as per merSETA organisational and operational changes.