

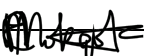



merSETA

MANUFACTURING, ENGINEERING
AND RELATED SERVICES SETA

GRANTS CRITERIA AND GUIDELINE

2023/24

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*The document shall be revised at least 12 months before the next revision date or as per merSETA organisational and operational changes

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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
CBOs	- Community-based Organisations
CEO	- Chief Executive Officer
CETC	- Community Education and Training College
CHE	- Council for Higher Education
COO	- Chief Operations Officer
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
NPC	- Non-Profit Company
NPO	- Non-Profit Organisation
NPP	- Non-Pivotal Plan
NQF	- National Qualifications Framework
NSDMS	- National Skills Development Management System

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- NSDP** - National Skills Development Plan 2030
- OQSF** - Occupational Qualifications Sub-Framework
- PIVOTAL** - Professional, Vocational, Technical and Academic Learning
- PPP** - Public Private Partnership
- PP** - PIVOTAL Plan
- PR** - PIVOTAL Report
- PSET** - Post-School Education and Training
- PwD's** - 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
- SOs** - Strategic Outcomes
- 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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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 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 (ARPL) 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 tools and processes that will contribute to the 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.

Bursary Scheme means financial sponsorship of studies for qualifications registered on the National Qualifications Framework (NQF).

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 colleges 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.

Corporate Social Initiative (CSI) means a development project within a community or for a community that is not core to merSETA but related to education or training, and in which merSETA may invest to create long-term benefits that will improve the socio-

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economic well-being of grant beneficiaries.

Discretionary Grants (DG) 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.

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 grant's 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 and related Grants Criteria and Guideline.

Full Funding Scheme means financial sponsorship of studies to the maximum amount of the bursary funding.

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, and 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 number of natural resources needed to produce finished goods through more energy and materials-efficient manufacturing processes.

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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.

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 (and initiative has same meaning) 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.

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 for purposes of this documents means (i) 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; (ii) artisan recognition of prior learning, bursary supported learning programmes, adult education and training programmes, academic skills programmes, skills sets, credit bearing or non-credit bearing short courses, student internships A, B, and C, individual modules for QCTO part or full qualifications.

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

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 grant's submission. This is applicable to companies where recognition agreements exist, regardless of the number of employees.

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 (MG) means funds designated as mandatory 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.

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.

Means Test means an assessment that shall be conducted to determine whether an individual is eligible for bursary allocation, based upon family/household's combined annual income.

merSETA Permanent Employee's Child means legal dependant or biological child or adoptive child doing studies in the PSET institutions.

Missing Middle Category means family/household with incomes between R350,000.00 and R700,000.00.

Non-Governmental Organisations (NGOs), Community-Based Organisations (CBOs), Non-Profit Organisations (NPOs), Non-Profit Companies (NPCs) means civil society organisations focused on public benefit and community development, registered with the Department of Social Development, and involved in programmes that are within or for the merSETA sectors.

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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 discretionary grants non-PIVOTAL programmes.

Non-PIVOTAL Programmes means (i) credit and non-credit bearing programmes not leading to qualifications or part qualifications, but must still address the key objectives and priorities of merSETA; (ii) project initiatives that include but are not limited to research, evaluation, innovation projects and other non-learning programmes 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 grants funding in terms of Section 6(7) and Section 6(10) of the Grant Regulations (Government Gazette No. 35940).

Partial Funding Scheme means financial sponsorship of studies to a partial amount of the bursary funding.

Partnerships mean 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, Vocational, Technical and 10academic learning programmes leading to qualifications or part qualifications registered on the NQF. PIVOTAL programmes may include internships or professional programmes that culminate in SAQA-recognised designations.

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 programmes, including apprenticeships.

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.

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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 skills development provider established by private sector companies or employer associations. Private education and training providers and skills development 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 mean strategic imperatives consisting of one or more projects or partnerships related to strategic imperatives in the merSETA's SP and APP.

Projects mean a non-routine, temporary 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 and reporting, and monitoring and evaluation requirements.

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

Qualification means a national qualification registered on the NQF.

Recognition of Prior Learning (RPL) 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 mean occupations identified through sector-related research and labour market analysis, as in demand, but for which there is an 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

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companies where a recognition agreement exists with trade unions or alternatively, 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 a legal entity accredited by the QCTO to offer occupational qualifications or part-qualifications registered on the OQSF.

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 mean 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 are linked to more than one NQF qualification according to the National Qualification Framework Act No. 67 of 2008.

Social Partners means in terms of 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 for the equitable benefit of all social partners.

Sponsorship means the provision of resources (money, people or equipment) by the merSETA (sponsor) directly to a sponsored entity (education institution, career expos, corporate social investment project) to enable the sponsored partner to pursue some activity in return for certain sponsorship rights (to be included in a sponsorship agreement) contemplated in terms of the merSETA marketing and communication strategy.

Strategic Projects mean 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) a 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

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the Higher Education Qualifications sub-framework of the NQF managed by the Council on Higher Education and SAQA.

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 programmes 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 levels **2** (two) to **4** (four) of the National Qualifications Framework, which is quality managed by Umalusi. TVET colleges may be 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.

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.

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 the forthcoming year.

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

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3. PURPOSE

- 3.1 The purpose of the merSETA grants criteria and guideline is to set out conditions, rules, and standards for:
 - 3.1.1 The management of grants that include the application, awarding and implementation of Mandatory Grants (MG) and Discretionary Grants (DG) funds.
 - 3.1.2 Grants allocation for the Professional, Vocational, Technical and Academic Learning (PIVOTAL) and non-PIVOTAL programmes.
 - 3.1.3 Evidence milestones required in the delivery of committed funds through Memorandum of Agreements (MoAs).

4. PRINCIPLES OF 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 a manner that is professional, unbiased, fair, and 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 **Due Diligence:** The merSETA is accountable for the efficient, effective and responsible allocation and utilisation of levy grants which are public funds. The merSETA therefore applies the due diligence principle in the management of levy grants and the way they are allocated and used for the needs and services of its grant policy beneficiaries.

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5. DISCRETIONARY APPLICATION AND AWARD

5.1 Application for merSETA Discretionary Grants

- 5.1.1 The merSETA will open a dedicated funding window(s) for Discretionary Grants (DG) and Mandatory Grants (MG) application.
- 5.1.2 The applications for discretionary grant funding are submitted following an official notice from merSETA published in public platforms which may include newspapers, the merSETA website-www.merseta.org.za and the merSETA social media/platforms. 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.
- 5.1.3 The discretionary grant applications, without exception, will be subjected to an evaluation, verification and an approval process.
- 5.1.4 With respect to implementing learning programmes, entities intending to apply for multi-year intakes, the merSETA could allow for the submission of PIVOTAL and Non-PIVOTAL Plans for discretionary grants-funded learning programme interventions showing three-year intake targets, which could be financially committed on an annual basis, in line with the three-year target setting.
- 5.1.5 Unless stated in the discretionary grants 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.
- 5.1.6 The applicants are encouraged to align the applications to the priority actions of the merSETA Sector Skills Plan (SSP) and performance indicators as outlined in the merSETA Annual Performance Plan (APP) obtainable on the merSETA website-www.merseta.org.za as well as any other strategic priority initiatives identified in the merSETA advertised notices and guidelines.
- 5.1.7 The merSETA may also initiate international partnerships for the benefit of the local industry.

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5.2 Discretionary Grants Allocation

- 5.2.1 The discretionary grants are allocated at the sole discretion of the merSETA.
- 5.2.2 The learning programmes, funded through the mandatory grant funding process, shall not be funded from discretionary grants funding.
- 5.2.3 The discretionary grants allocation will be allocated in line with the grant policy and availability of funds.
- 5.2.4 The discretionary grants 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 The additional funding could be considered, over and above the funding referenced in 5.2.4 clause above, provided the request is aligned to the merSETA priorities and availability of funds.
- 5.2.6 The applicants are encouraged to align applications to the priority indicators as outlined in the merSETA Annual Performance Plan (APP) obtainable on the merSETA website- www.merseta.org.za.

6. PRIORITY LEARNING PROGRAMMES

- 6.1 The merSETA's grants funding targets pertaining to PIVOTAL, and NON-PIVOTAL interventions (initiatives) aligned to the 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 The PIVOTAL programmes 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 The entities that are eligible to apply for discretionary grant funding to undertake PIVOTAL programmes include but are not limited to Employer companies, Non-Governmental Organisations (NGOs), Non-Governmental Organisations (NPOs), Community-Based Organisations (CBOs), Non-Profit Companies (NPCs), Public Education and Training Institutions, Government partnership and public entities.

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- 6.4 The applications for funding of PIVOTAL programmes are submitted following an official notice from the merSETA published in public platforms (Newspapers) including the merSETA website-www.merseta.org.za and the merSETA social media/platforms. 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.
- 6.5 The applications for funding of bursaries for unemployed learners may be allocated to the entities that will manage the bursary programme, including selection according to means test, support student during the learning and fulfil the merSETA reporting requirements.
- 6.6 The permanent merSETA employees' children bursary towards accredited, registered part qualification, and full qualification will be managed and reported by the merSETA.

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7. DISCRETIONARY GRANTS VALUES PER LEARNING PROGRAMME

7.1 PIVOTAL LEARNING PROGRAMMES

The table below indicates grant values for PIVOTAL learning programmes as defined.

PIVOTAL PROGRAMMES	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.	R206,290.00 up to the value of 49.5% of levy contributed is 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. <u>Bonus grants for people with disabilities</u> R20,625.00 per learner (proof to be submitted on registration)
QCTO modularised qualification certificates	R45,834.00 is payable in tranches for the duration of the training programme per learner until successful completion.
Learnership Level 1	
Learnership Level 2	R56,838.00 is payable in tranches for the duration of the training programme per learner until successful completion.
Learnership Level 3	R67,839.00 is payable in tranches for the duration of the training programme per learner until successful completion.
Learnership Level 4 or higher	R206,290.00 up to the value of 49.5% of the levy contributed is 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 840, 00.
Apprenticeships	R206,290.00 up to the value of 49.5% of the levy contributed is payable in tranches for the duration of the training programme per learner until successful completion of the trade test. <u>Bonus grants for people with disabilities</u> R20,625.00 per learner (proof to be submitted on registration)

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PIVOTAL PROGRAMMES	ESTIMATED VALUE
Learnerships (Historical registered qualifications unit standard-based)	R23,835.21 is payable per learner per level. Plus additional learner allowances NQF L1 = R45,834.00 NQF L2 = R56 838,00 NQF L3 = R67,839.00 NQF L4 or higher = R78,840.00 <i>Bonus grants for people with disabilities</i> R6,875.00 is payable per learner (proof to be submitted on registration).
Graduate Internship	Basic grant to the company: R96,250.00 is payable per annum per learner.
Candidacy (student internship category B)	A maximum grant of R288,750.00 is payable for a three-year period (R96,250.00 per annum).
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 the company (minimum 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 at TVET Colleges for permanently appointed employees at merSETA member companies.	A maximum grant of R26,125.00 is payable per learner. The actual payment will depend on the specific invoice amount of the TVET college.
Bursaries for unemployed learners studying at PSET institutions.	A maximum bursary grant of R180,000.00 is payable for the full bursary, and R110,000.00 for the partial bursary. Include but not limited to tuition fee, textbooks fee, laptop and student accommodation.
Artisan Recognition of Prior Learning (ARPL) and Recognition of Prior Learning (RPL)	R35,000.00 Employed Candidates (total grant including pre-assessment, gap training and trade testing, where applicable).

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Artisan Recognition of Prior Learning (ARPL) and Recognition of Prior Learning (RPL)	R55,000.00 Unemployed Candidates (total grant including pre-assessment, gap training and trade testing, where applicable).
Skills Programmes	<p>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 a maximum of 80 credits). Where learners have undertaken skills programmes, which consist 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 for training and R185.37 per credit for a learner allowance.</p> <p><u><i>Bonus grants for people with disabilities</i></u> For skills programmes up to a maximum of 80 credits (pro rata payments for less than 80 credits), the disability bonus is R4,583.00</p>
Skills Sets	<p>R385.00 per credit (only one programme per learner will be awarded. The grant value will be capped at a maximum of 80 credits for skill 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><i>Bonus grants for people with disabilities</i></u> For skills sets up to a maximum of 80 credits (pro rata payments for less than 80 credits), the disability grant value is R4,583.00</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 practical exposure for a minimum of 18 and a maximum of the 24-month period.
Credit Bearing Short Courses	R196,00. per credit (only one programme per learner will be awarded, up to a maximum of 119 credits).
The project management fee will be allocated at the discretion of merSETA and will be calculated at 7.5% or less of the total award.	

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7.2 NON-PIVOTAL PROGRAMME INITIATIVES

The table below provides examples of the types of initiatives that may fall within the category of non-pivotal programmes. The listed initiatives are not exhaustive. The applicants must take note that other programmes will be identified in DG funding window notices (adverts) sent out to invite DG applications.

NON-PIVOTAL PROGRAMME INITIATIVES	DESCRIPTION OF NON-PIVOTAL INTERVENTIONS
Lecturer Development	The learning programmes 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	The learning programmes address 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	The learning programmes support and encourage the development of small and micro-enterprises. The support may include funding/ training/workshops/ short skills/ mentorship/ incubation/ online training.
Co-operatives, CBOs, NGOs, NPCs, NPOs	The learning programmes support and encourage skills development for co-operatives and CBO/NGOs. The support may include funding/ training/workshops/ short skills/ mentorship/ incubation/ online training.
Skills/occupations for green or circular activities within or for mer industries	The developing skills for green or circular economy-related occupations or production or for establishing sustainable “green” values and activities through skills programmes, skill sets or part qualifications or full qualifications.
Worker Education and Training	The trade unions in the merSETA Sector, for the benefit of educating and developing their members on skills development programmes, form part of their duties as worker representatives.
Innovation and Research Programmes and Projects	The programmes may include curriculum research and programme/qualification development projects for transforming/emerging/new occupations in demand.
Non-Credit Bearing Programmes	Non-credit training will be planned on the Workplace Skills Plan (WSP) and reported on the Annual Training Report (ATR). Non-credit bearing training will be funded as non-PIVOTAL programmes for R1,227.87 per day for training including a stipend for a maximum of 10 days for the unemployed.

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Anti Gender Based Violence and Sexual Harassment Programmes	Gender-Based Violence (GBV) programmes which will be funded through proposal submissions with a proposed budget. This grant is available for employers to implement GBV programmes in their workplace.
Career advice and guidance programme	Career advice and guidance related projects include but not limited to initiatives such as conferences/workshops/seminars, sponsorship requests, career awareness and advocacy expos/exhibitions/events/publications, and career advice and guidance capacity building/training projects that enhance awareness of the merSETA services, products and influence positive uptake of the merSETA programmes to target audiences. Initiatives linked to the career programme may also include raising knowledge of current, emerging, transforming, and future occupations and skills for both merSETA internal and external stakeholders influencing continuous services and products delivery required of the merSETA mandate and functions.
Current and future skills	Programmes needed for development in technological advancement and digitalization (4 th Industrial Revolution).
Support the imperatives contained within Job Summit Agreements	Programmes 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 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	Programmes 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.

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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>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, and 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 3 x 49.5% levies contributed. A higher allocation will be considered on the condition that the company has the necessary capacity to implement the priority skills.</p> <p>Where 49.5% of the levies contributed are below R825,160.00 and R825,160.00 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>
COMPANY CATEGORY	CRITERIA	ESTIMATED GRANT ALLOCATION CONSIDERATIONS
Gold	<p>Must be a merSETA levy-paying company.</p> <p>Levies are 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>Gold companies get 2 x 49.5% levies contributed. A higher allocation will be considered on condition that the company has the necessary capacity to implement the priority skills.</p> <p>Where 49.5% levies contributed are below R825 160.00 an R825 160.00 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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COMPANY CATEGORY	CRITERIA	ESTIMATED GRANT ALLOCATION CONSIDERATIONS
Silver	<p>Limited exposure to skills development</p> <p>Have never worked with the merSETA before,</p> <p>To include non- levy paying companies.</p>	<p>Silver companies get 1 x 49.5% levies contributed. A higher allocation will be considered on condition that the company has the necessary capacity to implement the priority skills.</p> <p>Where 49.5% of the levies contributed are below R825,160.00 and R825,160.00 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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9. ENTITIES ELIGIBLE FOR DISCRETIONARY GRANT

- 9.1 The public and private entities within the manufacturing, engineering, and related services sectors are eligible for discretionary grants funding. The eligible entities include but not limited to:
- 9.1.1 The Public Education and Training Institutions (Universities, Universities of Technology, and TVETs), and public Community Education and Training Centres.
- 9.1.2 The 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 the 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 The Non-profit Organisations (NPOs inclusive of NGOs), and co-operatives that implements programmes within the merSETA sector that meet allocation criteria.
- 9.1.5 The trade unions in the merSETA sectors, for the benefit of educating and developing their members through skills development-related programmes; and
- 9.1.6 Refer to Annexure A below for the Grants Criteria and Guidelines for evaluating and recommending discretionary grants Project Applications 2023/24 for other types of eligible entities.

10. PAST PERFORMANCE AND DISCRETIONARY GRANT ALLOCATION

- 10.1 The 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 programmes.

Grant Window	Satisfactory Progression Criteria
DG Year 19	<ul style="list-style-type: none"> • Agreements closed out except for approved extensions with signed addendums in place.
DG Year 20	<ul style="list-style-type: none"> • Third tranche payment of all learning programmes has been paid. • All short learning programmes (12 Months or less) have closed out.
DG Year 21	<ul style="list-style-type: none"> • Second tranche payment of all learning programmes has been paid. • All learning programmes are to be closed out, except for learners on apprenticeships, NQF Level 2 to 4, bursaries, and internships.
DG Year 22	<ul style="list-style-type: none"> • First and second tranche payments for all learning programmes have been paid.

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Withdrawal on previous funding.	<ul style="list-style-type: none"> • Organisation's that have withdrawn on 2 consecutive allocations will need to submit the motivation before further allocations are considered.
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10.2 Refer to Annexure A below for the Grants Criteria and Guidelines for evaluating and recommending discretionary grants Project Applications 2023/24 provides further criteria and guidelines for the range of initiatives and related eligible entities.

11. CONTRACTING AND COMMITMENT

11.1 Contracting will be done in the form of a 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 conducted in line with the signed agreement and the grant recipient taking full responsibility for the implementation of the allocation and deliverables.

12.2 All MoAs will be managed by a designated merSETA official located either at the Head Office or at a regional office of the merSETA.

12.3 For MoAs with learning programme interventions, the merSETA regional offices will play a critical role in the management of the said MoAs, and provide support to the grant recipient including ensuring quality assurance of learning requirements such as workplace approval and accreditation.

12.4 Some projects as determined by the merSETA will have project governance structures which will meet at regular intervals to monitor the implementation projects. Such project governance structures will have terms of reference outlining the terms of engagement for both parties.

12.5 The merSETA reserves the right to terminate the agreement if the grant recipient has not adhered to the terms of the agreement.

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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 For a MoA which has learners, the grant recipient is required to register learners on 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 MoA which has learners will be paid when the MoA has achieved a 50% progress milestone.
- 13.4 The fourth tranche payment of a MoA which has learners will be paid when the MoA has achieved 100% completion.
- 13.5 In other forms of MoAs, the payment schedule will be agreed upon 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) and Annual Training Report (ATR) where applicable.
- 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 The 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 Client Liaison Officer (CLO) will conduct verifications at the respective regional offices.
- 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.

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- 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 the 15th of 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 the 30th of April of the financial year.
- 14.13 Employers who fail to meet the prescribed criteria, outlined in this document, will forfeit their grants.
- 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

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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 30th of April of the financial.
- 14.18 The employers who fail to meet the prescribed criteria, outlined in this document, will forfeit their grants.
- 14.19 The mandatory grants not claimed within the stipulated timeframe will be transferred to the discretionary grant by the 15th of 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 30th of 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 30th of April of the financial year and met the following criteria:
- 15.1.1 Submitted and implemented a Workplace Skills Plan and Annual Training Report, 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 The 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 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 The 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.

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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:

merSETA website: www.merseta.org.za	Skills Development Forums
Stakeholder publications	Roadshows
Newspapers	Regional offices
E-mail blitz	All official merSETA meetings
merSETA social media/platforms	

19. GUIDELINE REVIEW

- 19.1 This Discretionary Grants Criteria Guideline will be reviewed every five (5) years 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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20. ANNEXURE A - CRITERIA AND GUIDELINES FOR EVALUATING AND RECOMMENDING DG APPLICATIONS

20.1 The applicants should use the criteria and guidelines below as guidance in compiling their applications. The recommendation for DG awards will be evaluated against the criteria and guidelines below for the categories of initiatives indicated. The criteria and guidelines apply for both awarding and non-awarding recommendations.

Note:

The DG applications can be for projects and programmes addressing Programmes 2, 3 and 4 of the Annual Performance Plan (APP) 2023/24.

20.2 An application may address more than one focus area, strategic programme, 2023/24 APP strategic output or APP performance indicator.

20.3 Should the applicant not have provided evidence in respect of the criteria, the evaluator(s) or evaluation team may request missing evidence in the process of evaluation prior to making a recommendation for an award or non-award.

20.4 The requests for additional evidence must be submitted within 10 business days from the date of request. The merSETA may consider a longer period for the submission of additional evidence on the submission of a written request stating circumstances and motivation for the said request.

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1. Projects (non-learning programme initiatives): e.g., innovation, research, career advice & guidance programme related initiatives, PSET E&T curriculum improvement/review/support, 4IR	
1.1 Names of evaluation team	1.13 Link to Strategic Output/s of merSETA (ref APP 2023/24 Strategic Outputs (SOs))
1.2 Application ID from NSDMS	1.14 Link to APP 2023/24 performance indicator/s
1.3 Entity “N” Number or “SDL” Number as captured on NSDMS	1.15 Key result/s expected: i.e., purpose, objectives, outputs, outcomes
1.4 Name of entity	1.16 Clearly indicate the evidence used to determine the organisation’s capacity to deliver the project in accordance with the project purpose, objectives, outputs, and outcomes, and reference letter for similar work done.
1.5 Where the application is being done by a consulting or freelance SDF, a letter on the entity letterhead, no older than 3 months, signed by Chief Executive Officer/Managing /Director of the entity appointing the SDF.	1.17 Has merSETA previously had the applicant as a partner? If yes: indicate evidence of performance on previous MoA. If there is a MoA still in place indicate the progress of implementation of the MoA.
1.6 Proof of banking details – bank verified and signed by an entity Chief Executive Officer/Managing Director/Director/Chief Financial Officer	1.18 Is the project linked to or includes the delivery of learning/training/skills development programme/s? If yes, learning programme title or qualification or part qualification or unit standard/s title, number of beneficiaries, evidence of training capacity/record for stipulated learning/training/skill development programme (9s) even for non-credit bearing – i.e., proof of accreditation for credit-bearing short programme or NQF registered qualification or part qualification or unit standard. Accreditation may be with SETA, other QA, or recognized the accrediting body for courses such as a professional body, HEI. 2 reference letter not older than 3 months.
1.7 Type of entity (ref. all eligible entities listed in Grants Policy)	1.19 Occupation/s or skills gaps to be addressed if yes to (1.18) above
1.8 Legal status verification – a copy of the registration certificate of the relevant law	1.20 Duration of the project
1.9 State core business (goods and, or services) for which entity is registered	1.21 Amount for which applied
1.10 Tax clearance (indicate whether it has been acquired or requested). If requested the award will be provisional for 10 working days	1.22 Recommended amount - if less than the amount for which applied, reasons for the lesser amount recommendation.
1.11 BBBEE Certificate or Affidavit, where applicable	
1.12 Focus area of initiative as per the grant application advertisement and Grant Application Guideline	

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2. SME learning programme delivery application

2.1 Names of evaluation team	2.13 Link to APP 2023/24 performance indicator/s
2.2 Application ID from NSDMS	2.12 Link to Strategic Output/s of merSETA (ref APP 2023/24 Strategic Outputs (SOs))
2.3 Name of the entity	2.14 Learning programme type/s to be delivered i.e., learnership, ARPL, AET, apprenticeship, bursary, WIL, internship, candidacy, QCTO occupational qualification
2.4 Where the application is being done by a consulting or freelance SDF, a letter on the entity letterhead, no older than 3 months, signed by the Chief Executive Officer/Managing Director/Director of the entity appointing the SDF.	2.15 Is the applicant a previous merSETA delivery partner? If yes: indicate evidence of performance on previous MoAs. If there is a MoA still in place indicate the progress of implementation of the MoA.
2.5 Proof of banking details – bank verified and signed by the entity Chief Executive Officer/Managing Director/Director/Chief Financial Officer	2.16 Learning programme title or qualification or part qualification or unit standard/s title and evidence of training capacity/record for stipulated learning/training/skill development programme even for non-credit bearing short programmes: i.e., proof of accreditation for credit-bearing short programme or NQF registered qualification or part qualification or unit standard. Accreditation may be with a SETA, other QA, or recognized accrediting body for courses such as a professional body, HEI. 2 reference letters no older than 3 months.
2.6 Type of entity (ref. all eligible entities listed in Grants Policy)	2.17 Occupation/s or skills gaps to be addressed if yes to (2.16) above
2.7 Legal status verification – a copy of the registration certificate of the relevant law.	2.18 Beneficiaries: are the learning programmes for own staff and, or for unemployed persons, number?
2.8 State core business (good and, or services) for which entity is registered	2.19 Recommendation of the regional office
2.9 Tax clearance (indicate whether acquired or requested). If requested the award will be provisional for 10 working days	2.20 Duration of Project
2.10 BBBEE Certificate or Affidavit	2.21 Amount for which applied
2.11 Focus area of initiative as per the grant application advertisement and Discretionary Grant Application Guideline	2.22 Recommended amount - if less than the amount for which applied, reasons for the lesser amount recommendation

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3. Cooperative enterprise learning programme application

3.1 Names of evaluation team	3.13 Link to Strategic Output/s of merSETA (ref APP 2023/24 Strategic Outputs)
3.2 Application ID from NSDMS	3.14 Link to APP 2023/24 indicator/s
3.3 Entity “N” Number or “SDL” Number as NSDMS	3.15 Learning programme type/s to be delivered i.e., learnership, ARPL, AET, apprenticeship, bursary, WIL, internship, candidacy, QCTO occupational qualification
3.4 Name of entity	3.16 Is the applicant a previous merSETA delivery partner? If yes: indicate evidence of performance on previous MoAs. If there is a MoA still in place indicate the progress of implementation of the MoA.
3.5 Type of entity (ref. all eligible entities listed in Grants Policy)	3.17 Learning programme title or qualification or part qualification or unit standard/s title and evidence of training capacity/record for stipulated learning/training/skill development the programme even for non-credit bearing short programmes: i.e., proof of accreditation for credit-bearing short programme or NQF registered qualification or part qualification or unit standard. Accreditation may be with a SETA, other QA, or the recognized accrediting body for courses such as a professional body, HEI. 2 reference letters not older than 3 months.
3.6 Where the application is being done by a consulting or freelance SDF, a letter on the entity letterhead, no older than 3 months, signed by the Chief Executive Officer/Managing Director/Director of the entity appointing the SDF.	3.18 Occupation/s or skills gaps to be addressed if yes to (3.16) above
3.7 Proof of banking details – bank verified and signed by entity Chief Executive Officer/Managing Director//Director/Chief Financial Officer	3.19 Beneficiaries: own staff or unemployed, members of a cooperative
3.8 Legal status verification – a copy of registration certificate of the relevant law.	3.20 Indication of whether regional office verifications were done or not, recommendation of the regional office
3.9 State core business (good and, or services) for which entity is registered	3.21 Duration of project
3.10 Tax clearance (indicate whether acquired or requested). If the requested The award will be provisional for 10 working days	3.22 Amount for which applied
3.11 BBBEE Certificate or Affidavit	3.23 Recommended amount – if less than the amount for which applied, reasons for the lesser amount of recommendation
3.12 Focus area of initiative as per the grant application advertisement and Discretionary Grant Application Guideline	

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4. NGO/NPO/NPC/CBO/private entity applying as a skills development provider/training provider	
4.1 Names of evaluation team	4.13 Focus area of initiative as per the grant application advertisement and Discretionary Grant Application Guideline
4.2 Application ID from NSDMS	4.14 Link to Strategic Output/s of merSETA (ref APP 2023/24 Strategic Outputs (SOs))
4.3 Entity “N” Number or “SDL” Number as NSDMS	4.15 Link to APP 2023/24 performance indicator/s
4.4 Name of entity	4.16 Learning programme type/s to be delivered i.e., learnership, ARPL, AET, apprenticeship, bursary, WIL, internship, candidacy, QCTO occupational qualification.
4.5 Where the application is being done by a consulting or freelance SDF, a letter on the entity letterhead, no older than 3 months, signed by the Chief Executive Officer/Managing Director/Director of the entity appointing the SDF.	4.17 Is the applicant a previous merSETA delivery partner? If yes: indicate evidence of performance on previous MoAs. If there is a MoA still in place indicate the progress of implementation of the MoA.
4.6 Proof of banking details – bank verified and signed by the entity Chief Executive Officer/Managing Director/Director/Chief Financial Officer	4.18 Learning programme title or qualification or part qualification or unit standard/s title and evidence of training capacity/record for stipulated learning/training/skill development programme even for non-credit bearing short programmes: i.e., proof of accreditation for credit-bearing short programmes on NQF registered qualification or part qualification or unit standard. Accreditation may be with a SETA, other QA, or the recognized accrediting body for courses such as professional body, HEI. 2 reference letters no older than 3 months.
4.7 Type of entity (ref. all eligible entities listed in Grants Policy)	4.19 Occupation/s or skills gaps to be addressed if yes to (4.16) above
4.8 State core business (good and, or services) for which entity is registered	4.20 Beneficiaries: own staff or unemployed, members of a cooperative
4.9 Legal status verification – a copy of the registration certificate of the relevant law	4.21 Indication of whether regional office verifications were done or not, recommendation of the regional office
4.10 Letter of good standing from the Department of Social Development (DSD) National – NB if registered under NPO Act	4.22 Duration of project
4.11 Tax clearance (indicate whether acquired or requested). If the requested the award will be provisional for 10 working days	4.23 Amount for which applied
4.12 BBBEE Certificate or Affidavit	4.24 Recommended amount – if less than the amount for which applied, reasons for the lesser amount of recommendation

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5. HEI/TVETC/CET applying to deliver learning programmes

5.1 Names of evaluation team	5.11 Link to Strategic Output/s of merSETA (ref APP2023/24 Strategic Outputs (SOs))
5.2 Application ID from NSDMS	5.12 Link to APP 2023/24 indicator/s
5.3 Entity “N” Number or “SDL” Number as NSDMS	5.13 Learning programme type/s to be delivered i.e., learnership, ARPL, AET, apprenticeship, bursary, WIL, internship, candidacy, QCTO occupational qualification
5.4 Name of entity	5.14 Is the applicant a previous merSETA delivery partner? If yes: indicate evidence of performance on previous MoAs. If there is a MoA still in place indicate the progress of implementation of the MoA.
5.5 Type of entity (ref. all eligible entities listed in Grants Policy)	5.15 Learning programme title or qualification or part qualification or unit standard/s title and evidence of training capacity/record for stipulated learning/training/skill development the programme even for non-credit bearing short programmes: i.e., proof of accreditation for credit-bearing short programme or NQF registered qualification or part qualification or unit standard. Accreditation may be with a SETA, other QA, or recognised accrediting body for courses such as a professional body, HEI. 2 references letter no older than 3 months
5.6 Proof of banking details – bank verified and signed by the entity Chief Executive Officer/Managing Director/Director/Chief Financial Officer	5.16 Occupation/s or skills gaps to be addressed if yes to (5.16) above
5.7 Legal status verification – a copy of the registration certificate for private TVET/CET/HEI	5.17 Beneficiaries: (i) Number of learners, and must also indicate beneficiaries in terms of one or both of (ii) and (iii) (ii) Target learners i.e., graduate interns, TVETC/HEI WIL learners, retrenched workers (Former employee of the mer-Sector member company), ARPL candidates, AET learners, entrepreneurship learners, apprentices, learnership learners, bursary recipients; (iii) Target organisations e.g., SMEs, cooperatives, NGOs, CBOs, start-ups/incubation projects, rural/township enterprises, or projects
5.8 Tax clearance for private HEI/TVETC/CET (indicate whether acquired or requested). If requested award will be provisional for 10 working days.	5.18 Duration of the project
5.9 BBBEE Certificate or Affidavit, where applicable	5.19 Amount for which applied
5.10 Focus area of initiative as per the grant application advertisement and Grant Application Guideline	5.20 Recommended amount – if less than the amount for which applied, reasons for lesser amount recommendation

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6. Entity applying to project manage the delivery of learning programmes (an entity that may be an intermediary body or skills development agency that is not delivering the training but will manage the placement of learners to be trained by host employers and, or skills development provider, and or PSET institutions. Such entities may also be agencies to manage merSETA bursaries for studies at PSET institutions for the study of qualification for the priority occupations and skills list in the SSP and APP	
6.1 Names of the evaluation team	6.13 Link to APP 2023/24 performance indicator/s
6.2 Application ID from NSDMS	6.14 Learning programme type/s to be delivered i.e., learnership, ARPL, AET, apprenticeship, bursary, WIL, internship, candidacy, QCTO occupational qualification
6.3 Entity “N” Number or “SDL” Number as NSDMS	6.15 Is this a new applicant? If yes: indicate evidence used to determine the capacity to deliver on the application submitted - i.e., project management capacity in terms of human resources (project management team) and project finance and administration systems, a system for recruitment of learners, a system for the acquisition of third-party skills development providers or training institutions and, or host employers
6.4 Name of entity	6.16 Is the applicant a previous merSETA delivery partner? If yes: indicate evidence of performance on previous MoAs. If there is a MoA still in place indicate the progress of implementation of the MoA.
6.5 Type of entity (ref. all eligible entities listed in Grants Policy)	6.17 Third-party agreements already in place for the delivery of learning programmes and proof of the third party’s/parties’ capacity to deliver the learning programme/s for which the entity has applied – i.e., proof of accreditation by recognised accrediting body and reference letters. Third-party agreements are already in place with potential host companies where the learning programmes are either a WIL or candidacy or work experience internship or a learnership or an apprenticeship or any other that requires workplace experience for learners to complete.
6.6 Proof of banking details – bank verified and signed by the entity Chief Executive Officer/Managing Director/Director/Chief Financial Officer	6.18 Occupation/s or skills gaps to be addressed if yes to (6.14) above
6.7 Legal status verification – a copy of the registration certificate of the relevant law	6.19 Beneficiaries: (i) Number of learners, and must also indicate beneficiaries in terms of one or both of (ii) and (iii) (ii) Target learners i.e., graduate interns, TVETC/HEI WIL learners, retrenched workers (Former employee of the mer-Sector member company), ARPL candidates, AET learners, entrepreneurship learners, apprentices, learnership learners, bursary recipients; (iii) Target organisations e.g., SMEs, cooperatives, NGOs, CBOs, start-ups/incubation projects, rural/township enterprises, or projects
6.8 State core business (good and, or services) for which entity is registered	6.20 Regional verification confirming the legitimacy of applying entity

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6. Entity applying to project manage the delivery of learning programmes (an entity that may be an intermediary body or skills development agency that is not delivering the training but will manage the placement of learners to be trained by host employers and, or skills development provider, and or PSET institutions. Such entities may also be agencies to manage merSETA bursaries for studies at PSET institutions for the study of qualification for the priority occupations and skills list in the SSP and APP	
6.9 Tax clearance (indicate whether acquired or requested). If the requested the award will be provisional for 10 working days.	6.21 Duration of the project
6.10 BBBEE Certificate or Affidavit, where applicable	6.22 Amount for which applied
6.11 Focus area of initiative as per the grant application advertisement and Grant Application Guideline	6.23 Recommended amount – if less than the amount for which applied, reasons for the lesser amount recommendation
6.12 Link to Strategic Output/s of merSETA (ref APP 2023/24 Strategic Outputs (SOs))	

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