



DISCRETIONARY GRANT

FUNDING WINDOW GUIDELINES: WORKERS AND UNEMPLOYED

2025-2026

BANKSETA FUNDING WINDOW GUIDELINES

1. Purpose

This document has been developed to guide the application process for BANKSETA Discretionary Grant Funding Windows. It considers the SETA Grant Regulations and the BANKSETA Discretionary Grant Policy. This document provides guidelines for the opening of funding windows, inviting applications, evaluation of applications, allocation of funds and payment of funds. This document aims to ensure a consistent, fair, and transparent process.

Definition: A funding window is an invitation to stakeholders to apply for funding from the SETA for the programmes that the funding window is intended for. The programmes may include learnerships, internships, and bursaries, etc. or may be aimed at a particular stakeholder grouping, for example Levy paying organisations. The window period has a specified opening date and a specified closing date.

1. Objective

The objective of this funding window is to invite BANKSETA **levy paying employers** to apply for Discretionary Grant Funding for the following:

	Programme	Total Funding Available *	Capped Amount per Learner
1	Workers enrolled in learnership programmes	**R75 000 000	R45 000
2	Workers granted Bursaries (new entries) <i>New Entries - This relates to any programme that is a one-year to 18-month programme (such as Postgraduate Diploma, Occupational Qualification, etc. or a first year of study for a qualification such as Bachelor of Arts, Bachelor of Commerce or Master's Degree)</i>	**R30 000 000	R45 000
3	Workers granted Bursaries (continuing)	**R25 000 000	R45 000

	<i>Continuing Bursaries refer to learners in the second, third or final year of studies.</i>		
4	Workers enrolled in Skills Programmes	**R12 000 000	R25 000
5	IT Skills for Workers (non SAQA / SETA registered and may include international qualifications)	**approximately R20 000 000	R33 166
6	Unemployed learners enrolled in learnership programmes	**R136 640 000	R112 000
7	Unemployed learners enrolled in internship programmes	**R54 000 000	R99 000
8	Unemployed learners enrolled in skills programmes	**R28 000 000	R56 000

** If the BANKSETA Board approves additional funding for a particular funding window, BANKSETA may approve additional applications or increase the funding for a particular application. Only approved applications will qualify for additional funding and only up to the number of learners applied for.*

*** These amounts are subject to change and subject to final approval of the 2025/2026 budget.*

PLEASE NOTE: The above funding is per learner per programme irrespective of the duration it takes the learner to complete the programme. For example, Occupational Qualifications may take longer to complete.

2. Invitation Process

- BANKSETA will publish all funding window invitations on the BANKSETA website www.bankseta.org.za
- The funding windows open on 31 October 2024 and close at 16h00 on 14 February 2025.

3. Eligibility Criteria

Applicants must meet the eligibility criteria as indicated below to qualify for funding. Any applicant not meeting the eligibility criteria will be disqualified.

- The applicant (Employer) must have submitted a Workplace Skills Plan and Annual Training Report (where applicable) by the due date of 30 April 2024 or 30 May 2024 (where extension was granted) to BANKSETA.
- The employer must be up to date with levy contributions with BANKSETA.

4. Evaluation Criteria

To qualify for funding, applications must meet the evaluation criteria indicated below. Any application that does not adhere to these criteria will be declined.

- Application forms requiring the registration numbers for Learnerships, Skills Programmes and Qualifications **must** be completed in full and correctly.
- Application forms requiring the accreditation number for training providers (where applicable) **must** be completed in full and correctly.
- Application forms where linkage to Organising Framework for Occupations (OFO) is required **must** be completed in full and correctly
- Application forms **must** indicate the start and end date of the programmes. These funding windows are **only** for programmes starting from 1 April 2025 and no later than 28 February 2026.

5. Allocation Criteria

The following formula will be used to determine the allocation of grants to all approved applicants:

Available budget per category x levy contribution percentage of applicant (Levy contribution for 2023/2024 to be used with a 5% increase)

If there are funds remaining after applying the formula to successful applications, such funds will be allocated equally to each applicant up to the number of learners applied for.

6. Submission process

- No late applications will be accepted.
- Applicants are not limited to the number of applications per category; however, applicants must complete a **separate application form** for **each category** that they wish to apply for.
Applicants must, however, be aware of the available budget per programme.
- An application register **must** accompany the applications per category, i.e., Submit Application form for Learnerships *and* Application Register for Learnerships. Each category will be evaluated individually.
- Only applications for programmes starting from 1 April 2025 will be considered.
- In the case of Bursaries, proof of registration for the 2025 academic year is required as part of performance information.
- Applications must be submitted on a secure platform such as Dropbox, WeTransfer, or Microsoft OneDrive. The applicant must confirm submissions on this platform by sending an e-mail to a specified e-mail address: DGFW-Applications2025@bankseta.org.za
- Applications **must** also be submitted on the BANKSETA MIS. (*Training will be provided to all stakeholders*).

- Stakeholders must note that applications must be submitted on the BANKSETA MIS **and** via email to DFGW-Applications2025@bankseta.org.za and applications not submitted in **both** ways will be declined.
- Submission of the application will be acknowledged; however, applicants must note that the completeness and correctness of applications will only be evaluated/determined after the closing date.
- Applicants must keep a copy of their submission for their internal use and backup purposes.

7. Evaluation Process

- In all cases an evaluation panel shall be established to evaluate applications.
- The evaluation panel will be appointed by the CEO. All panel members will be required to sign a declaration of interest.
- The evaluation panel and decision will be recorded for audit purposes.
- All grants are VAT inclusive, and this funding is specifically for training costs, and /or learner allowances (for unemployed learners). Funding does not include set up/initiation costs, administration and/or including capitalization of projects.
- If the BANKSETA Board approves additional funding for a particular funding window or if there are savings or underutilization by successful applicants, BANKSETA may approve additional applications or increase the funding for a particular applicant. Only approved applications will qualify for additional funding.
- If there are insufficient applications in a certain category/programme, BANKSETA may request successful applicants to train additional learners and approve additional funds to train more learners over and above the number of learners applied for.
- Feedback on the status of the application will be provided to unsuccessful applicants.

8. Approval, Appeal and Change Request Process

- The evaluation documentation will be submitted for Probity Review. The probity review report will be submitted for review to the CEO. Once the CEO has reviewed, the report and supporting evidence as required will be submitted to the Finance and Remuneration Committee for recommendation to the BANKSETA Board. Final approval will be done by the BANKSETA Board. The BANKSETA Board may delegate approval functions to the CEO as indicated in the BANKSETA Delegations of Authority Policy
- 1.2 Should an (unsuccessful) applicant want to appeal the decision, this must be done in writing and **within one month** of receiving the evaluation outcome. The request will be submitted to the CEO to review and thereafter the decision is final.
 - 1.3 Change requests must be submitted to the BANKSETA with a motivation for the change within one month of signing the MoA The approval of the change request may be approved by the

CEO provided that the approved amount is not exceeded and that the change is still in line with the guidelines.

9. Contracting, Commitment Schedule and Project system update

- BANKSETA will sign a Memorandum of Agreement (MoA) with the applicant for approved applications.
- 1.4 The approval notification to the applicant will include a deadline date for the return of signed MoAs to the BANKSETA so that funds are not left uncommitted for extended periods of time.
- 1.5 The project manager will monitor all the received MoAs and any MoA not signed and returned to BANKSETA by the agreed date will be cancelled.
- 1.6 If the MoA has expired, and no project extension request is received by BANKSETA at least three months *before* the lapse of the MoA or if BANKSETA detects there is no project activity taking place and no reasonable cause has been provided, the MoA will be terminated, and the funding forfeited.
- 1.7 Approved projects need to be implemented in the timeframes of the MoA. The BANKSETA will not accept learner performance information that falls outside of the 2025/2026 financial year.

1. Invoicing / Funds Disbursement Process

- Upon approval of the application, the Applicant and BANKSETA will sign a Memorandum of Agreement (MoA) to formalize the application and to agree to the disbursement schedule (in line with the specific application)
 - The first invoice to the BANKSETA must be accompanied by official proof of banking details.
 - The final invoice will be paid subject to all the project requirements being met. This may include a monitoring and evaluation audit conducted by BANKSETA.
 - Progress Reports are to be submitted with invoices as required (BANKSETA to provide template).
 - Invoices will be paid provided all project requirements are met and supporting documentation are provided (such as proof of payment to other parties, proof of disbursement of stipends to unemployed learners, etc.)
 - Successful applicants and payments are subject to a monitoring and evaluation process.
- 1.8 The BANKSETA will only pay for beneficiaries who successfully complete the programme as required, and only make final payments once all other tranche criteria requirements are met.
- 1.9 Applicants are reminded that all supporting documentation related to funding of employees (trainees), should be submitted **within two months of signing the MoA**.
- 1.10 Completion certificates should be submitted **within one month of the learner successfully completing and no later than 28 February of each year**.

1. Extensions

1.11 Applicants should endeavour to meet deadlines and complete the project within the project plan submitted during application phase. If, however, this is not possible the applicant should apply in writing to have the timelines extended at least three months before the expiry date of the MoA.

1.12 Should it be impractical to implement the project due to unforeseen circumstances,

Applicants must accept that the grant will be withdrawn, and applicants will use the next funding windows process to apply afresh.

1. Disclaimer, Termination and Breach

- In all instances, BANKSETA reserves the right to approve / decline funding at its discretion. BANKSETA further reserves the right to allocate budgets within the available funding considering equitable distribution of available resources.
- The BANKSETA reserves the right to verify, monitor and audit any of the above approved grants during the implementation period by a designated BANKSETA representative. Payments are also subject to these processes as per the quality requirements stipulated by BANKSETA.
- The BANKSETA may withhold grants or recover any grants paid to an applicant if it is found that the grants allocated are not being used for the purpose for which the grant was intended. This includes but are not limited to the employment status of intended beneficiaries stated incorrectly (employed / unemployed), fraudulent identity documents (deceased learners), etc.
- Non-compliance will lead to summary termination of the agreement and the Contracting party will, due to non-compliance have neither right to any grants or disbursements nor any other right out of this agreement.

10. Confidentiality of information

In compliance with the requirements of the Protection of Personal Information Act (POPI), BANKSETA wishes to inform all its stakeholders that in applying for funding, invoicing the BANKSETA and providing supporting information for such invoices, the below standards will apply:

BANKSETA undertakes to keep all information obtained or received by it for purposes of funding applications, funding agreements, invoicing and performance information disclosed or provided by the employers in confidence and in a safe and secure manner.

- Information shall be revealed only to the representatives, agents, and employees whose knowledge of the information is required for the purpose related to administering the funding applications, funding agreements, invoices and supporting documentation.

The purpose related to administering the funding applications, funding agreements, invoices and supporting documentation includes the following:

- reporting skills development initiatives to the Department of Higher Education and Training.
- reporting enrolments and achievements of programmes to the South African Qualifications Authority.
- reporting on quality assurance functions to the Quality Council of Trades and Occupations.
- evaluating and processing applications for access to funding.
- compiling statistics and other research reports.
- providing personalised communications.
- providing information for internal and external auditing purposes
- complying with the law; and/or
- for a purpose that is ancillary to the above.

Information related to Memoranda of Agreement will be kept for 5 years after the stated end date. After 5 years it will be destroyed.

If BANKSETA is required by legal process to disclose any of the information, it shall provide the employer with prompt notice of such requirement so that the employer may seek a protective order or agree to the provision of information. If a protective order or other remedy to ensure that only information covered by such other or other remedy is obtained, the BANKSETA shall use all reasonable efforts to ensure that only the information covered by such order or other remedy is disclosed. Whether or not a protective order or other remedy is obtained, or the employer party agrees to the provision of information, BANKSETA shall take all the reasonable steps to ensure that only the portion of the information which it is legally required to disclose, is disclosed.