



DISCRETIONARY GRANT FUNDING WINDOW GUIDELINES
Rural Skills Development Support Project 2026/27

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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.

2. Objective

The objective of this funding window is to support the implementation of the District Development Model through skills development in **rural communities**.

3. Invitation Process and Application requirements

3.1 BANKSETA will publish all funding window invitations on the BANKSETA website www.bankseta.org.za

3.2 The funding window opens on 28 April 2026 and closes at 16h00 on 15 May 2026.

3.3 No late applications will be accepted.

3.4 All applications to be submitted online through the BANKSETA [MIS](#). BANKSETA will host Information sessions to train all potential applicants.

4. Eligibility Criteria

The following applicants are eligible to apply under this funding window

4.1 Primary Providers accredited by BANKSETA whose accreditation status will be valid for the duration of the programme

4.2 Secondary providers whose programme approval status will be valid for the duration of the programme

4.3 Applications must be for skills development in rural areas and training must be face to face in the rural area applied for. The training provider's business must be located / registered in the province where the planned training will take place.

4.4 The application form must be completed in full.

4.5 All applicants must be registered on the Central Supplier Database and all must be in order. BANKSETA will verify this at the time of application.

4.6 Eligible programmes are BANKSETA registered learnerships or BANKSETA registered skills programmes (please see attached)

4.7 Applicants must provide the municipality assessment report applicable to the rural area for which they are applying.

5. Evaluation Criteria

5.1 RECRUITMENT OF PROPOSED BENEFICIARIES (30%)

- The applicant must explain how recruitment of learners will happen
- The applicant must explain how onboarding, induction and workplace placement of learners will happen
- In the case of learnerships, the applicant must provide confirmation from an employer for the hosting of learners (BANKSETA will conduct workplace approval pre implementation, see workplace approval form attached)

5.2 IMPLEMENTATION PLAN (50%)

- The applicant must provide an implementation plan, including but not limited to how the administration of the project will be managed, training schedule including training days, assessment strategy, and end to end timelines, monitoring of learner workplace attendance and progress, reporting to BANKSETA etc.
- The plan must show timelines, activities, milestones, and responsibilities.
- The plan must show initiation, planning, implementation, monitoring and evaluation, and project closure and a risk mitigation plan.

5.3 CAPACITY AND EXIT STRATEGY (20%)

- The applicants' track record and previous experience in projects of this nature should be clearly demonstrated.
- Exit strategy for beneficiaries.

6. Funding Allocation Criteria

6.1 The maximum amount per learner for learnerships is: R113 440. (Training costs no more than R40 000, stipend per month no more than R6000 plus 2% UiF, duration no longer than 12 months)

6.2 The maximum amount per learner for skills programmes is: R48 360. (Training costs no more than R30 000, stipend per month no more than R3000 plus 2% UiF, duration no longer than 6 months)

6.3 No cap on number of learners but BANKSETA reserves the right to decrease the number of learners per applicant and / or per category of programme to remain within the budget of R10 000 000 for the entire window.

6.4 Funding will be allocated to ensure alignment with the approved BANKSETA Annual Performance Plan and Strategy.

7. Funding will be priorities for woman and people with disabilities.

Note: Applicants must include the stipend amount in their application, however BANKSETA will pay learner stipends directly to learners.

8 Evaluation and Allocation Process

8.1 In all cases an evaluation panel shall be established to evaluate applications.

8.2 The evaluation panel will be appointed by the CEO.

8.3 All panel members will be required to sign a declaration of interest.

8.4 The evaluation panel and decision will be recorded for audit purposes.

8.5 All grants are VAT inclusive, and this funding is specifically for training costs. Funding does not include set up/initiation costs, administration and/or including capitalization of projects.

8.6 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.

8.7 Feedback on the status of the application will be provided to all applicants.

9 Approval, Appeal and Change Request Process

- 9.1 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.
- 10.2 Should an (unsuccessful) applicant want to appeal the decision of the BANKSETA, this must be done in writing and within one month of receiving the outcome. The request will be submitted for review. After reconsideration, the BANKSETA's decision is final.
- 10.3 Change requests are discouraged but should this be unavoidable, the request must be submitted to the BANKSETA within one month of receiving the outcome and with motivation for the change. The approval of the change request is at the discretion of the CEO provided that the approved amount is not exceeded and that the change is still in line with the guidelines. No change may be implemented without approval by BANKSETA.

11 Contracting, Commitment Schedule, and Project system update

- 11.1 BANKSETA will sign a Memorandum of Agreement (MoA) with the applicant for each application that is approved.
- 11.2 The approval notification to the applicant should include a deadline date for the return of signed MoAs to the BANKSETA so that funds are not left uncommitted for long periods of time.
- 11.3 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.
- 11.4 Applicants should endeavor 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 and where needed to sign an addendum to the MoA to extend the end date. This should be done well in advance and at least three months before the initial completion date.
- 11.5 If the MoA has expired, and no project extension request is received by BANKSETA 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.

12 Invoicing/ Funds Disbursement Process

- 12.1 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)
- 12.2 The BANKSETA will request an invoice from the stakeholder upon receipt and verification

for completeness of performance information received.

- 12.3 The other tranche payments will be paid subject to all the project requirements being met. This may include a monitoring and evaluation audit conducted by BANKSETA, proof of payment to other parties, proof of disbursement of stipends to unemployed learners, etc.)
- 12.4 BANKSETA will only accept and pay for performance information that is current and falls within the current financial year (no performance information dated after 31 March 2027).
- 12.5 Successful applicants and payments are subject to a monitoring and evaluation process.
- 12.6 Progress Reports are to be submitted as outlined on each MOA (BANKSETA to provide template).
- 12.7 Successful applicants and payments are subject to a monitoring and evaluation process.
- 12.8 The BANKSETA will only be paying for beneficiaries who are active in the programme, and on completion BANKSETA will pay for successfully completed learners. In all cases payments will be made once all other tranche criteria requirements are met.
- 12.9 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 is not limited to the employment status of intended beneficiaries stated incorrectly (employed / unemployed), fraudulent identity documents (deceased learners), etc.
- 12.10 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.

13 Disclaimer, Termination and Breach

- 13.1 In all instances, BANKSETA reserves the right to approve / decline funding at its discretion.
- 13.2 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.
- 13.3 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.
- 13.4 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.

14 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:

14.1 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.

14.2 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.

14.3 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 communication.
- providing information for internal and external auditing purposes
- complying with the law; and/or
- for a purpose that is ancillary to the above.

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

14.5 In the event that BANKSETA is required by legal process to disclose any of the information, it shall provide the applicant with prompt notice of such requirement so that the applicant may seek a protective order or agree to the provision of information.

14.6 In the event that 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.

14.7 Whether or not a protective order or other remedy is obtained, or the applicant 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.
