DISCRETIONARY GRANT:

CAREER DEVELOPMENT PRACTITIONERS' WORKSHOPS

FUNDING WINDOW GUIDELINES – 3.36
2026-2027

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BANKSETA FUNDING WINDOW GUIDELINES - CAREER DEVELOPMENT PRACTITIONERS WORKSHOPS

1. Purpose

This document has been developed to guide the application process for BANKSETA Discretionary Grant Funding Windows. 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. This guideline must be read together with the BANKSETA Discretionary Grant Policy, Policy Unique Number 28/2026/February 2026, effective 27 February 2026, the SETA Grant Regulations. Where any inconsistency arises, the approved policy, applicable legislation and Delegations of Authority will prevail. Link to website.

2. Invitation Process

- The funding window will be published on the BANKSETA website and will remain open for a minimum period of **four weeks**.
- Applications and supporting documents must be submitted using the prescribed BANKSETA templates through SIMS (BANKSETA Information Management System). Failure to use the prescribed templates or submission process may result in disqualification – https://sims.bankseta.org.za/login
- The funding window opens on **31/08/2026** and closes at 16h00 on **30/09/2026**.
- Applications received after the published closing date and time, or through a channel other than the prescribed submission channel, will not be accepted.
- Training on how to apply online (SIMS) will be provided, and attendance of the briefing session is therefore encouraged.

3. Objective

For purposes of this guideline the following applies:

Applicant	**Eligible institution** Public Universities, Public Universities of Technology (UoTs), Public Technical and Public Vocational Education Training Colleges (TVETs) and Public Community of Education Training Colleges (CETs) **The BANKSETA will only accept applications and communicate with eligible institutions directly and not through third parties.**

Delegate	Teacher, Retired Teacher or Career Development Practitioner actively participating and attending the workshop. Delegate must hold **SA Identity Document.**
Learner/beneficiary	Person who later receives career information.

The BANKSETA Career Development Project responds to the need for enhanced career guidance, skills awareness and access to opportunities for young people and unemployed graduates across South Africa. Although the financial sector requires a steady pipeline of skilled and work-ready individuals, many learners and job seekers have limited exposure to career options and insufficient information about scarce and critical skills, resulting in a mismatch between qualifications pursued and the skills required by employers.

In line with BANKSETA's mandate to support skills development, transformation and economic growth, the Career Development Workshops will equip delegates with the relevant information, resources and tools needed to provide effective career guidance to learners and beneficiaries and support informed pathways to sustainable employment.

The objective of this funding window is to invite Public Education and Training Institutions such as Universities, Universities of Technology (UoTs), Technical and Vocational Education Training Colleges (TVETs) and Community of Education Training Colleges (CETs) to apply for Discretionary Grant Funding for the delivery of **career development and career advice interventions** in accordance with the approved Discretionary Grant Policy.

4. Funding

For purposes of this window the following funding applies:

Deliverable	**Capped Amount per Delegate** *(VAT Inclusive)*	**Requirements**
A one-day, in-person workshop for teachers, Retired Teachers and Career Development Practitioners to provide career guidance and share BANKSETA material with learners and other beneficiaries	R 2 000.00 *This is an all-inclusive amount per delegate and provides for the end-to-end costs*	Conduct a one-day, in-person workshop for teachers, retired teachers, or Career Development Practitioners so that they can provide career information to Learners/Beneficiaries. Applicants will be required to use their own training material **aligned** to the BANKSETA Career Guide. BANKSETA will provide Career Guides on occupations in the Banking and Alternative Banking Sector.

5. Delivery Model

Applications must align with the relevant requirements of the funding window:

- The proposed intervention is a **one-day, in-person Career Development Workshop**.
- The proposed delegates are teachers, retired teachers and/or Career Development Practitioners who hold SA Identity document.
- The workshop must equip delegates to provide career guidance to learners/beneficiaries.
- Applicants will be required to use their own training material **aligned** to the BANKSETA Career Guide. BANKSETA will provide Career Guides on occupations in the Banking and Alternative Banking Sector.
- The province and proposed workshop delivery site is clearly identified and the delivery site has been classified as urban or rural.
- Maximum of **25 delegates** per classroom/workshop are permitted.

6. Application / Submission Criteria

Applicants must meet the application criteria as indicated below to qualify for funding:

- The Funding window must be selected and the application submitted on SIMS.
- Applicants are permitted to apply for more than one delivery site per application. **However, only one application form is permitted per applicant.**
- The application form must be uploaded to SIMS.
- Applications on the SIMS system closes at **16:00** on the day that the window closes. **No late submissions will be accepted**.

7. Eligibility Criteria

Applicants must meet the eligibility criteria as indicated below to qualify for funding:

- Eligible applicants:
    - Public Universities;
    - Public Universities of Technology (UoT);
    - Public Technical and Vocational Education Training Colleges (TVETs);

- Public Community of Education Training Colleges (CETs);

8. Evaluation Criteria

An evaluation panel will be established to assess all applications received. The panel will be appointed by the CEO and will consist of at least three (3) members. Each panel member must sign a declaration of interest before the evaluation process begins. The evaluation proceedings, recommendations and final decisions will be documented and retained for audit purposes.

BANKSETA will use non-scored evaluation criteria to evaluate applications:

- The application form must be completed correctly, in full and signed.

- Applicant is not under investigation (The applicant must not be under investigation for mismanagement of funds, fraudulent activities, or conduct resulting in fruitless and wasteful expenditure. Applicants that do not meet this criterion will be deemed ineligible for funding in accordance with the BANKSETA Discretionary Grant Policy).

- Consideration of Past Performance and Track Record (The applicant's past performance and track record on previously funded BANKSETA projects) will be assessed in a fair, transparent and proportionate manner. Past performance will not, on its own, result in automatic disqualification. The assessment will consider the applicant's utilisation of approved funding, achievement of project outputs, compliance with contractual and reporting requirements, and overall project performance. BANKSETA may use the contract register, Commitment Schedule, monitoring reports, performance records, write-back records, termination records, supporting documentation and relevant investigation or whistleblowing to verify past performance.

- The applicant nor any person involved in this application may have any actual, potential or perceived conflict of interest or prohibited related-party relationship with BANKSETA, and must undertake to disclose any such conflict or relationship immediately.

9. Allocation Criteria

Funding will be equitably distributed among qualifying applicants, taking into account the following:

- The availability of funding.
- BANKSETA may limit the number of delegates approved or the amount allocated per application to support the equitable distribution of available funding.
- Provincial representation and geographic spread.
- The balance between rural and urban delivery sites.
- A positive track record may result in prioritisation, while material underperformance may result in a reduced allocation or the application being declined.
- An administration allocation of 5% of the approved direct workshop-delivery costs will apply.

10. Funding Conditions

- All grants are VAT inclusive. Funding may only be used for the approved direct workshop-delivery costs, and the approved administration allocation. Set-up, initiation, capital expenditure will not be funded.
- 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.
- Additional allocations will be approved in accordance with the Delegations of Authority. The Discretionary Grant Policy provides for CEO approval within the delegated threshold and Board approval where the combined additional allocation exceeds that threshold.
- If there are insufficient applications in a certain category/programme, BANKSETA may request successful applicants to train additional delegates and approve additional funds to train more learners over and above the number of learners applied for.

- BANKSETA may undertake further due diligence or a risk assessment after initial approval and, based on the outcome, may reduce or withdraw the approved allocation and, where implementation has commenced, **recover** any funds already disbursed, subject to the terms of the agreement and applicable processes.

11. 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.

- Feedback on the status of the application will be provided to unsuccessful applicants. An unsuccessful applicant may appeal where it believes that the decision was incorrect or that relevant mitigating circumstances were not considered. The appeal must be submitted within **one month** of receipt of the outcome, must identify the grounds of appeal and must include supporting evidence. Appeals will be considered in accordance with the approved Discretionary Grant Policy and Delegations of Authority.

- Change requests are discouraged but should this be unavoidable, the request which includes a written request signed by the authorised signatory, motivation, supporting evidence, revised implementation plan, revised timelines and revised budget where applicable, must be submitted to the BANKSETA within **one month** of receiving the outcome or whenever a change becomes necessary. 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.

- An extension request must be submitted at least **three months** before the contractual end date, with revised timelines and supporting motivation. An agreement that has already expired will not be reinstated.

- Where the approved number of delegates cannot be achieved or funds will not be fully utilised, the contracting party must notify BANKSETA within **one month** of becoming aware of the underutilisation.

12. Contracting, Commitment Schedule and Project system update

- BANKSETA will sign a Memorandum of Agreement (MoA) with the applicant for funding approved.

- 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 long periods of time.

- The project manager will monitor all the received MoAs and any MoA not signed and returned to BANKSETA by the agreed date may be cancelled.

- Applicants should endeavor to meet deadlines and complete the project within the timelines 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 at least three months before the initial completion date.

- If the MoA expires without an approved extension, it will not be reinstated. Where BANKSETA determines that no project activity is taking place and the applicant has not provided a reasonable explanation, BANKSETA may terminate the MoA, withdraw any remaining funding and recover funds where applicable.

- All signed agreements, addenda, amendments and payments will be recorded on the BANKSETA Commitment Schedule and reported quarterly.

13. 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).

- No payment will be made unless the deliverables and supporting evidence stipulated in the MoA and disbursement schedule have been received, verified and accepted by BANKSETA.

- The first invoice to the BANKSETA must be accompanied by official proof of banking details which may not change for the duration of the project.

- The final invoice will be paid subject to all the project requirements being met. This may include a monitoring and evaluation process conducted by BANKSETA.

- Progress Reports / Close out Reports are to be submitted with invoices as required (BANKSETA to send template).

- Invoices will be paid provided all project requirements are met and supporting documentation is provided (such as proof of payment to other parties, etc.)

- Successful applicants and payments are subject to a monitoring and evaluation process.

- Final payment will only be made for applicants who meet the approved completion requirements and once all tranche criteria have been met. BANKSETA may recover payments arising from invalid, fraudulent, duplicated or otherwise non-compliant claims.

- Applicants are reminded that all supporting documentation (full attendance, signed register – **as per the template provided**) related to funding of delegates, that have actively participated, should be submitted with the last invoice.

- Only performance information and deliverables relating to the applicable financial year will be considered for payment.

- The contracting party may not use project savings for another activity or purpose. Savings and unutilised or underutilised funds must be disclosed to BANKSETA and written back to the discretionary grant pool. Any reallocation will be subject to the approved policy and Delegations of Authority.

14. Disclaimer, Termination and Breach

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

- 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. Mismanagement, duplicate beneficiaries, unsupported expenditure, non-achievement of approved outputs, material reporting failures, fruitless and wasteful expenditure and other fraudulent claims.

- Non-compliance will lead to 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.

- Material non-compliance may result in withholding of payments, reduction of funding, termination of the agreement and/or recovery of funds, subject to the terms of the MoA, the approved policy and an appropriate fair process.

- BANKSETA monitoring and evaluation may include funding expenditure and related procurement, quality of delivery, project-management efficiency, project risks, confirmation of delegates, participant feedback and verification of approved outputs.

15. Impact Assessment

- Applicants must participate in BANKSETA tracer, evaluation and impact-assessment activities and must provide information reasonably required for this purpose.

- The impact assessment will be conducted in accordance with the applicable SETA Monitoring and Evaluation Framework and parameters determined by the BANKSETA Board. For any delegates that may have changed their contact details – the applicant must inform BANKSETA of such changes.

16. Confidentiality of information

- In compliance with the requirements of the Protection of Personal Information Act, 2013 (POPIA), 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 applicant 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.

17. Reporting

BANKSETA's reporting function 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 for 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.

- 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. 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 applicant 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.
- Applicants agree to provide information as required by BANKSETA for the purpose of reporting to the Department of Higher Education and Training, as well as other statutory stakeholders.