

DEPARTMENT OF HIGHER EDUCATION AND TRAINING

NO. 2971

27 January 2023

SKILLS DEVELOPMENT ACT, 1998 (ACT NO. 97 OF 1998)

THE SECTOR EDUCATION AND TRAINING AUTHORITIES (SETAs) GRANT REGULATIONS REGARDING MONIES RECEIVED BY A SETA AND RELATED MATTERS

I, Bonginkosi Emmanuel Nzimande, Minister of Higher Education, Science and Innovation, Intend to repeal the Sector Education and Training Authorities (SETAs) Grant Regulations regarding monies received by a SETA and related matters, published in Government Notice No. R.990 in *Government Gazette* No. 35940 of 3 December 2012, as amended by Government Gazette No. 36655 of 15 July 2013, and I intend to make the Sector Education and Training Authorities (SETAs) Grant Regulations regarding monies received by a SETA and related matters, as contained in the Schedule, in terms of section 36 of the Skills Development Act, 1998 (Act No. 97 of 1998), after consultation with the National Skills Authority. These regulations are hereby published for comments. All interested persons and organisations are invited to comment on the Regulations in writing, and to direct their comments to –

The Director-General, Private Bag X174, Pretoria, 0001, for attention: Ms N Gumbi, email Gumbi.N@dhet.gov.za.

Kindly provide the name, address telephone number, fax number and email address of the person or organisation submitting the documents.

The comment should reach the Department within 21 calendar days after publication of this Notice.



Dr. Bonginkosi Emmanuel Nzimande, MP
Minister of Higher Education, Science, and Innovation

Date: 10/1/2022

Schedule**THE SECTOR EDUCATION AND TRAINING AUTHORITIES (SETAs) GRANT REGULATIONS REGARDING MONIES RECEIVED BY A SETA AND RELATED MATTERS****CHAPTER 1 – GENERAL PROVISIONS**

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1. INTERPRETATION**2. SHORT TITLE**

These regulations may be cited as the SETA Grant Regulations, 2022.

3. DEFINITIONS

- (a) **"administration costs"** means the monies received by a SETA that may be used in the manner that may not exceed the threshold prescribed in the annexure to the regulation issued and determined on an annual basis subject to section 7(2)(vii), (3), (5) and strictly for goods or services relating to rent, heat, light, power, insurances, bank charges, audit fees, accounting fees, legal fees, postage, printing, stationery, documentation and books, advertising, reports, wages and salaries, travel expenses, staff training, purchase of electronic devices such as computers, printers, general maintenance of electronic devices, hiring [costs] of photocopier, telephone and fax, meetings, land, non-residential buildings and improvements thereon, furniture and office equipment, other machinery and equipment, transportation of assets, consultancy fees, institutional and sectoral research, quality assurance, promotional items, national skills development conferences expenses, recruitment expenses and any other reasonable administration expenses approved by a SETA Accounting Authority.
- (b) **"annexure"** means an annexure to these Regulations,
- (c) **"APP"** means the Annual Performance Plan as contemplated in regulation 3(7);
- (d) **"ATR"** means the Annual Training Report as contemplated in section 10(1)(b)(ii) of the Skills Development Act read with regulation 7(1);
- (e) **"commitments"** within the context of a surplus means the contractual obligation that exists at the end of the financial year that will oblige a SETA to make a payment(s) in the ensuing year;
- "contractual obligation"** means an agreement between a SETA and a third party wherein a third party undertakes to perform under the contract

in relation to a project for which a SETA will be obliged to make payment against the sectoral grant;

- (f) **"financial year"** means a year ending on 31 March in accordance with the Public Finance Management Act No 1 of 1999 as amended;
- (g) **"institutional and sectoral research"** means research commissioned by a SETA on any aspect of the administration or management of a SETA, as well as research into sector supply and demand;
- (h) **"labour representative"** means a representative of the labour constituency within the workplace, appointed by the recognised trade union;
- (i) **"legal fees"** means the total amount of legal services rendered with regards to legal proceedings or any order of costs made by a court of law against a SETA;
- (j) **"levy paying employer"** means an employer who is liable to pay skills development levies in terms of section 3(1) of the Skills Development Levies Act;
- (k) **"mandatory grant"** means funds designed as mandatory grants contemplated in regulation 4 to fund the education and training programmes as contained in the workplace skills plan and ATR of a SETA;
- (l) **"occupational part qualification"** means a recognised component (theoretical, practical or work experience component) of an occupational qualification which is registered on the National Qualifications Framework;
- (m) **"occupational qualification"** means a qualification that includes a knowledge, a practical and work experience components registered on the National Qualifications Framework;

- (n) “**Sectoral Priority Occupations and Interventions**” means priority occupations identified by the sector through research as occupational shortages planned to be addressed through a variety of interventions in a specific financial year;
- (o) “**SETA levy income**” means the total amount of money received by a SETA in terms of 14(1) of the Skills Development Act. [with section 7(1) and 8(2)(a) read with 8(3)(b)] of the Skills Development Levies Act];
- (p) “**sectoral grant**” (Discretionary Grant) means the money allocated to be spent on skills needs identified by the sector and to fund those programmes emanating from national priorities contemplated in regulations 6(2)(c) to (10) read with regulation 7;
- (q) “**project costs**” means costs payable for an approved project funded through a discretionary grant;
- (r) “**public education and training institution**” means a public education institutions established, declared or merged in terms of the post school education laws;
- (s) “**post school education laws**” means the Higher Education Act No 101 of 1997 or the Continuing Education and Training Act No 16 of 2006;
- (t) “**sign-off**” means an in principle agreement between the employer and its recognised trade union(s) on the identified training interventions as provided for in regulation 5(2)(f);
- (u) “**SSP**” means the Sector Skills Plan as contemplated in section 10(1)(a) and (b) of the Act;
- (v) “**structured workplace learning**” means the component of learning in an occupational qualification, an internship, or work placement for professional designation whereby a learner is mentored by a qualified,

and where required, registered mentor in the application and integration of the knowledge and practical skills learnt, under supervision, in the actual context of a workplace in accordance with the prescripts set by the relevant qualification authority or professional body;

(w) **"submit"** means to delivery by hand or registered post or to transmit a communication by electronic mechanism as a result of which the recipient is capable of printing the communication;

(x) **"surplus"** means a favourable residual balance in the statement of financial performance for the financial year ending on 31 March less current liabilities and commitments to training of learners in programmes funded from discretionary funds;

(y) **"the Act"** means the Skills Development Act, 1998 (Act No 97 of 1998);

(z) **"Workplace-based Learning Grant"** means funds designed as workplace-based learning grant contemplated in regulation 8 to fund the workplace-based learning programmes.

(aa) **"work integrated learning"** mean an intervention as contemplated in an occupation qualification where a person internalises knowledge, skills and competencies and gain insight through exposure to work by achieving specific outcome to enhance employability; and

(bb) **"WSP"** means the workplace skills plan contemplated in section 10(1)(b)(ii) of the Skills Development Act read with regulation 7(1).

3. INTERPRETATION

(1) In these regulations-

(a) a reference to a section by number refers to the corresponding section of the Act;

- (b) a reference to a regulation by number refers to the corresponding provision of these regulation; and
 - (c) a reference to a sub-regulation or other partial regulation by number refers to the corresponding clause of the regulation in which the reference appears.
- (2) A word or expression that is defined in section 1, or elsewhere in the Act, to the extent applicable in particular circumstances, bears the same meaning in these regulations as in the Act.

4. ADMINISTRATION COSTS

- (1) In terms of section 14(3)(b) read with sections 14(3A)(a) and 14(3B) of the Act, a SETA may not use more than **11%** of the total levies paid by employer as allocated in the Act received in any year to pay for its administration costs in respect of that financial year.
- (2) In addition to sub-regulation (1), a SETA may use the contributions received from public service employers in the national or provincial spheres of government as contemplated in section 30 of the Act, and relevant national and provincial public entities as contemplated in section 30A of the Act for its administration costs.
- (3) The Minister may grant written approval authorising a SETA to use an amount contemplated by sub-regulation (1) and (2) for its administration costs, if the Minister is satisfied that such expenditure is necessary to enable the SETA to continue performing its functions in terms of the Act.
- (4) Such expenditure must not be a recurring cost such as rent expenditure, salaries and wages.

5. TRANSFER TO THE QCTO

- a. On monthly basis a SETA must transfer 1% as part of its administration costs contemplated in sub-regulation 4(1) of Levies received to the

QCTO for quality assurance functions as contemplated in section 26H of the Act.

- b. A SETA must transfer the 1% to the QCTO within 14 working days of receipt of the Levies from the Department.
- c. The QCTO must ensure that all SETAs have the correct banking details and as when the QCTO updates their banking details all SETAs must be notified.
- d. QCTO must acknowledge receipt of funds in writing within 21 working days of receipt of funds.

6. SETA FINANCES AND FINANCIAL MANAGEMENT

- (1) Each SETA must, in compliance with the Public Finance Management Act, establish banking accounts.
- (2) A SETA must use all monies received in terms of the Skills Development Levies Act to –
 - (a) Administer the activities of the SETA;
 - (b) Pay employers their mandatory grants;
 - (c) Pay employers their workplace-based learning grant; and
 - (d) Implement its SSP and APP as contemplated in the Treasury Regulations issued in terms of the Public Finance Management Act, through the allocation of the sectoral grants.
- (3) A SETA must transfer any unclaimed mandatory funds and any interest earned thereon by 15 August of each financial year into the sectoral grant.

- (4) Any unspent administrative funds and any interest earned on funds must on 31 March of each financial year be placed in the sectoral grant.
- (5) The amount in the sectoral grant on 1 April each year, together with the "sectoral" allocation from levy income received each month, must be spent or committed within the financial year.
- (6) A SETA is required to allocate 70% of its available "sectoral grant" within a financial year to "Sectoral Priority Occupations and interventions" that address scarce and critical skills in its sectors.
- (7) A SETA must set out in its APP a reasonable estimate of "sectoral grant" that will be available in the sector for training of scarce and critical skills through Sectoral Priority Occupations and interventions", that will receive grant allocations for training of learning and skills programmes identified as priorities set out in the SSP.
- (8) The APP contemplated in sub-regulation (2)(c) must specifically set out how –
 - (a) the "sectoral" funds will be allocated to achieve SSP outputs and outcomes; and
 - (b) the National Skills Development Plan (NSDP) outcomes will be achieved in the sector.
- (9) A SETA must state how the allocation of funds in the manner presented in the APP will achieve impact in the sector, and how this will be measured.
- (10) Notwithstanding sub-regulation (3) to (9), a SETA may for compelling reasons and circumstances, request the Director-General in writing to approve the utilisation of the surplus, within the scope of the Act and the National Skills Development Plan.

- (11) At the end of each financial year a SETA must have spent or committed (through actual contractual obligations) at least 95% of sectoral grant available to it by the 31 March of each year and a maximum of 5% of uncommitted funds may be carried over to the next financial year.
- (12) Where exceptional circumstances have led to projected under-spending of sectoral grant, a SETA will be able to submit a business case to the Minister of Higher Education, Science and Innovation to request approval by the Minister of Finance to carry over the surplus funds in compliance with Section 53(3) of the PFMA.

7. ALLOCATION OF MANDATORY GRANTS BY A SETA

- (1) Subject to sub-regulation (6), a SETA must allocate a mandatory grant to a levy paying employer –
 - (a) Employing 50 or more employees that has submitted a completed WSP/ ATR in accordance with sub-regulation (2) and as a minimum in the format contained in Annexure 2 to these regulations;
 - (b) Employing less than 50 employees that has submitted an application for a grant in accordance with sub-regulation (2) and such employees will be given the option of submitting a WSP/ATR using a simplified form provided by the SETA;
 - (c) Who, notwithstanding sub-regulation (2), has registered for the first time in terms of section 5 of the Skills Development Levies Act and the employer has submitted an application for a mandatory grant within 6 months of registration.
- (2) An application for a mandatory grant in terms of sub-regulation (1) must be submitted by 30 June 2023.

- (3) With effect from 1 April 2024 an application for a mandatory grant in terms of sub-regulation (1) must be submitted by 30 April of each year.
- (4) 20% of the total levies paid by the employer in terms of section 3(1) as read with section 6 of the Skills Development Levies Act during each financial year will be paid to the employer who submits an WSP/ATR.
- (5) Before making payments, the SETA must approve the WSP/ATR to ensure the levy paying employer meets data quality standard set by the SETA.
- (6) The mandatory grant contemplated in sub-regulation (1) must be paid to the employer at least quarterly every year.
- (7) If the levy paying employer does not claim a mandatory grant within the time period specified in sub-regulation (2), the SETA must transfer the levy paying employer's unclaimed mandatory grant to the sectoral fund by 15 August of each year.
- (8) A SETA Accounting Authority may grant an extension up to a maximum period of one month from the date contemplated in sub-regulation (2) for late submission of an application for a mandatory grant subject to a written request by a levy paying employer and in line with the SETA Grants policy.

8. ALLOCATION OF WORKPLACE BASED LEARNING GRANT BY A SETA

- (1) A SETA may allocate an amount to the maximum of 15% to an employer that has proven or demonstrated that they can take on unemployed learners on workplace base learning programmes.

- (2) A SETA must issue a letter of approval to the qualifying employer indicating the amount and the number of learners the SETA can afford which may not exceed 15% of the levy paid by the employer.
- (3) A SETA must pay invoices within 30 days as per National Treasury Regulations unless determined otherwise in a contract or other agreement.
- (4) A SETA must approve the workplace for a period of three to five years on condition that an employer has met all the requirements as set out in the Workplace based Learning Programme Agreement Regulations of 2018.
- (5) A SETA must monitor the training by an employer who has been approved to take on learners on workplace base learning programmes in line with their grant policies.
- (6) A programme applied for by the employer must be in line with the SETA priority skills.
- (7) A standard payment of each learning programme must be determined per SETA taking into considering financial strength of the SETA, the sector, the programme offered. i.e, apprentice, learnership, internship, WIL etc.

9. MANDATORY GRANTS PAID TO LEVY PAYING EMPLOYERS

- (1) A levy paying employer claiming a mandatory grant must meet the eligibility criteria for the payment of a mandatory grant as prescribed in sub-regulation (2).

- (2) A SETA may not pay a mandatory grant to an employer who is liable to pay the skills development levy in terms of section 3(1) of the Skills Development Levies Act, unless the levy paying employer –
- (a) has registered with the Commissioner in terms of section 3(1) of the Skills Development Levies Act;
 - (b) has paid levies directly to the Commissioner in the manner and within the period determined in section 6 of the Skills Development Levies Act;
 - (c) is up to date with the levy payments to the Commissioner at the time of approval and in respect of the period for which an application is made;
 - (d) has submitted an WSP/ ATR as contemplated in regulation 4(1) within the time frames prescribed in regulation 4(2) and (4(3);
 - (e) with effect from 1 April 2023, has submitted and implemented its WSP for the previous financial year to the extent that it satisfies the criteria for implementation that must be established and approved by the SETA Accounting Authority base on guidelines provided by the Department; and
 - (f) in the case of an employer who has a recognition agreement with a trade union or trade unions in place, there must be evidence provided that the WSP have been subject to consultation with the recognised trade unions and the WSP/ATR must be signed off by the labour representative appointed by the recognised trade union unless an explanation is provided.

10.ALLOCATION OF SECTORAL GRANTS BY A SETA

- (1) A SETA may determine and allocate sectoral grants in support of the implementation of its SSP.
- (2) A SETA must develop its SSP by taking into account the national strategic goals as set out in the National Skills Development Plan, the National Development Plan and any other national priorities within the PSET system.
- (3) The APP of the SETA must make clear how the SETA will allocate sectoral grants in a manner that prioritises the offering of skills development programmes to address skills needs through education and training institutions offering post school education.
- (4) A SETA must in accordance with any guidelines issued by DHET, develop a sectoral grant policy, specifying how the SETA sectoral grant will be allocated to meet sector needs as set out in the SSP.
- (5) With effect from 01 April 2023, a SETA must in consultation with the DHET approve its sectoral grant policy every 3 years.
- (6) The sectoral grant policy must set out the funding framework, the different delivery models and project types that will be deployed and the mechanism for SETA member organisations, as contemplated in sub-regulation (10), to access the sectoral grant.
- (7) The sectoral grants policy must set out how Sectoral Priority Occupations and Interventions can be delivered through public education and training institutions offering post school education and training.
- (8) A SETA must prepare and distribute grant application and project proposals forms in a manner that enables within the sector national access and opportunities for a legal person or enterprises of different sizes (including small and micro enterprises, Non-Government

Organisations (NGOs) and cooperatives in the sector) to apply for any category of grant, or participate in any type of skills development programme, as identified in the SETA Sectoral Grant Policy.

- (9) The Sectoral Grants Policy must embrace the principles of transparency, openness, access and fairness.

(10) THE SECTORAL GRANTS POLICY MUST:

- (a) indicate the purpose of the various grants, funding frameworks and projects and specify what is intended to be funded from the grant, including any administrative costs that may be considered appropriate by the Accounting Authority;
- (b) provide for procedures and communication on strategy with potential beneficiaries as contemplated in sub-regulation (10) that set out timeframes for processing of applications, communication of decisions, and payment schedules;
- (c) determine the proportion of sectoral grants that can be used for administration or project management purposes in the various grant and project categories provided it indicates that a maximum of 8% of any grant or SETA- funded project may be used for administration or project management costs; and
- (d) ensure that value for money is achieved and generally ensure that funds are spent on skills development to meet sector needs and national priorities.
- (e) Ensure that provision is made for consideration of unsolicited proposals that support national priorities that emerge from time to time

**(11) A SECTORAL GRANT MAY BE PAID TO A LEGAL PERSON,
INCLUDING –**

- (a) a public education and training institution offering post school education and training;
 - (b) an employer or enterprise within the jurisdiction of a SETA, including an employer or enterprise not required to pay a skills development levy in terms of the Skills Development Levies Act;
 - (c) other legal person contemplated in sub-regulation (7) that meets the criteria for the payment of such grant; or
 - (d) an employer contemplated in section 30 and 30(A) of the Act who has submitted to its relevant line SETA or Public Service SETA (PSETA) within the time frames prescribed in regulation 4(2) and 4(3), a WSP/ ATR as a minimum in the format contained in Annexure 2.
- (12) A key focus of SETA must be to address scares and critical skills through programmes that are designed to address such skills, and which include work integrated learning.
- (13) At least 70% of sectoral grant funding must be allocated to Sectoral Priority Occupations Interventions.
- (14) A SETA may allocate a maximum of 30% to fund programmes, other than Sectoral Priority Occupations Interventions, to develop the sector in accordance with the priorities outlined in the SSP. Of the 30%, up to 15% may be spent on short courses (accredited and non-accredited) and worker education and up to 15% may be spent on work readiness programmes.

- (15) A SETA must determine in their Grant policies how non-levy paying employers will access workplace-based learning grant.
- (16) In order to obtain sectoral grant funding for Sectoral Priority Occupations Interventions from a SETA, a legal person falling into the categories set out in sub-regulation (10) must complete and submit a Sectoral Priority Occupations Interventions training plan and report using the template attached to these regulations.
- (17) Companies employing less than 50 employees will not be required to complete the prescribed Sectoral Priority Occupations Interventions training plan and report but will be asked to provide information on participation in Sectoral Priority Occupations Interventions programmes and the impact of these programmes; SETAs must develop suitable templates for the provision of information by small and micro enterprises inclusive of Co-operatives.

12. APPROVAL OF GRANTS BY A SETA

- (1) The SETA criteria for grants payment must be approved by the SETA Accounting Authority before funds are allocated.

13. GRANT DISBURSEMENT SCHEDULE

- (1) Each SETA must prepare and distribute a schedule setting out the criteria in terms of regulations 4 and 6 and the dates by which applications for grants must be submitted, as well as time frames for disbursements of grants.

14. PAYMENT FOR SERVICES RENDERED BY A SETA

(1) For purposes of section 14(1)(e) of the Act, a SETA may only charge for services if –

- (a) it has submitted a motivation in writing to the Director-General; and
- (b) the Director-General, in accordance with any guidelines issued by the Minister on the advice of the National Skills Authority, has approved the SETA charging those services.

15. REPEAL OF REGULATIONS PREVIOUSLY PUBLISHED

(1) The Sector Education and Training Authorities (SETAs) Grant Regulations regarding monies received by a SETA and related matters, published in Government Notice No R.990 in Government Gazette No. 35940 of 3 December 2012, as amended by Government Gazette No. 36655 of 15 July 2013 are hereby repealed.

ANNEXURE 2 (Private)

PLANNING

AND

REPORTING

Private Sector Template

Minimum Requirements

SECTION A: ADMINISTRATIVE DETAILS										
ENTITY DETAILS										
A1: Entity Name										
A2: Skills Development Levy Number (SDL)										
A3: Postal Address of the Main Office				City						
				Province						
				Postal Code						
A4: Standard Industrial Code (SIC Code) for the main business activity										
DETAILS OF THE PERSON WHO COMPLETED THE FORM										
A5: Title										
A6: Surname										
A7: First Name										
A8: ID Number										
A9: Telephone Number										
A10: E-mail										
BANKING DETAILS										
A11: Name of Bank										
A12: Account Number										
A13: Name of account Holder										
A14: Type of Account										
A15: Branch Name										
A16: Branch Code										

SECTION B: EMPLOYMENT SUMMARY

B1: Total number of employees per occupational category, by gender, population group, disability status and age group

Occupations		Male				Female				Total	People with Disability				Age Groups			Geography	
OFO Code	Occupational Category	A	C	I	W	A	C	I	W		A	C	I	W	<35	35-55	>55	Local Municipality	

B2: Total number of employees in each province

SECTION C: SKILLS DEVELOPMENT

C1: Planned beneficiaries of training per occupational category, by gender, population group and disability status

Occupations		Male				Female				Total	People with Disability				Age Groups			Geography	
OFO Code	Occupational Category	A	C	I	W	A	C	I	W		A	C	I	W	<35	<35-55	>55	Local Municipality	

C2: Planned training – unemployed

OFO Code	Occupational Category	Number to be trained at		
		Entry level	Intermediate Level	Advanced Level

C3: Planned training – employed

OFO Code	Occupational Category	Number to be trained at		
		Entry level	Intermediate Level	Advanced Level

C4: Planned AET training

AET	Total number to be trained
AET	

SECTION D: REPORT ON TRAINING INTERVENTIONS

D1: Number of actual beneficiaries of training per occupational category, by gender, population group and disability status.

Occupations		Male				Female				Total	People with Disability				Age Groups			Geography
OFO Code	Occupational Category	A	C	I	W	A	C	I	W		A	C	I	W	<35	35-55	>55	Local Municipality

D2: Number of beneficiaries who completed the training interventions

OFO Code	Occupational Category	Educational Institute	Number to be trained at		
			Entry level	Intermediate Level	Advanced Level

D3: Total number of beneficiaries who completed AET programmes

AET Training	Total number of employees
AET	

D4: Impact Assessment

Indicate how training as reported in this Annexure has affected the company.	
Percentage of Payroll spent on training	

SECTION E : PLANNED PIVOTAL TRAINING

E1: Number of planned beneficiaries of training per occupational category, by gender, population group and disability status.

Occupations				Male				Female				Total	People with Disability				Age Groups			Geography	Start date	End date
OFO Code	Occupational Category	NQF level	PIVOTAL Programme	A	C	I	W	A	C	I	W		A	C	I	W	<35	35-55	>55	Local Municipality		

E2: Number of verified beneficiaries of training per occupational category, by gender, population group and disability status.

Occupations				Male				Female				Total	People with Disability				Age Groups			Geography	Start date	End date
OFO Code	Occupational Category	NQF level	PIVOTAL Programme	A	C	I	W	A	C	I	W		A	C	I	W	<35	35-55	>55	Local Municipality		

E3: Planned training – unemployed

OFO Code	Occupational Category	NQF level	PIVOTAL Programmes	Number to be trained at			Start date	End date
				Entry level	Intermediate Level	Advanced Level		

E4: Planned training – employed

OFO Code	Occupational Category	NQF level	PIVOTAL Programme	Number to be trained at			Start date	End date
				Entry level	Intermediate Level	Advanced Level		

SECTION F : PIVOTAL TRAINING REPORT

F1: Number of Trained beneficiaries per occupational category, by gender, population group and disability status.

Occupations				Male				Female				Total	People with Disability				Age Groups			Geography	Start date	End date
OFO Code	Occupational Category	NQF level	PIVOTAL Programme	A	C	I	W	A	C	I	W		A	C	I	W	<35	<35-55	>55	Local Municipality		

F2: Number of verified beneficiaries of training per occupational category, by gender, population group and disability status.

Occupations				Male				Female				Total	People with Disability				Age Groups			Geography	Start date	End date
OFO Code	Occupational Category	NQF level	PIVOTAL Programme	A	C	I	W	A	C	I	W		A	C	I	W	<35	35-55	>55	Local Municipality		

F3: Number Trained – unemployed

OFO Code	Occupational Category	NQF level	PIVOTAL Programmes	Educational Institute	Number trained at			Start date	End date
					Entry level	Intermediate Level	Advanced Level		

F4: Number Trained – employed

OFO Code	Occupational Category	NQF level	PIVOTAL Programme	Educational Institute	Number trained at			Start date	End date
					Entry level	Intermediate Level	Advanced Level		

F5: Impact Assessment

Indicate how training as reported in this Annexure has affected the company.	
Percentage of Payroll spent on training	

SECTION G : GENERAL COMMENTS

(Insert any clarification or comment that you wish to make on any aspect of the Annexure. (Provide the number of the item that your comment refers to).)

SECTION H: AUTHORISATION AND STAKEHOLDER SUPPORT

Section G of the template, with the original signatures, must be submitted to the skills development division of the relevant SETA by hand, post or fax by 30 April.

DECLARATION

We, the undersigned, submit this information in fulfillment of this entity's legal obligation in terms of the skills development legislation and regulations. We declare that, to the best of our knowledge, the information contained in this Annexure is accurate and up to date. We recognise that any inaccurate statement in this document may constitute fraud and be subject to the full penalty of the law.

SIGNATORIES

H1: Designated Signatory	Name and Surname	Telephone Number	Original Signature	Date
The person who completed these Annexure				
Designated employee representative				

AUTHORISATION

H2: CEO / Managing Director				
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ANNEXURE 2 (Public)

PLANNING

AND

REPORTING

Public Sector Template

Minimum Requirements

SECTION A: ADMINISTRATIVE DETAILS									
ENTITY DETAILS									
A1: Entity Name									
A2: Skills Development Levy Number (SDL)									
A3: Postal Address of the Main Office		City							
		Province							
		Postal Code							
DETAILS OF THE PERSON WHO COMPLETED THE FORM									
A4: Title									
A5: Surname									
A6: First Name									
A7: Contact Details	ID Number								
	Telephone Number								
	Fax								
	Cell Number								
	Email								
	Postal Address								
A8: Contact of the CFO		Code							
		Name and Surname							
		Telephone							
		Fax							
		Cell Number							
		Email							

SECTION B: TRAINING BUDGET

B1: Total Personnel budget for the current financial year	
B2: One per cent (1%) of the personnel budget	
B3: Total Planned training budget for the current financial year	
B4: Additional funding planned for the current financial year	

SECTION C: EMPLOYMENT SUMMARY

C1: Total number of employees per occupational category, by gender, population group, disability status and age group

Occupations		Male				Female				Total	People with Disability				Total	Age Groups			Geography
OFO Code	Occupational Category	A	C	I	W	A	C	I	W		A	C	I	W		<35	<35-55	>55	Municipality
TOTAL																			

SECTION D: SCARCE SKILLS

D1: Total number of employees per occupational category, by gender, population group, disability status and age group

Occupations		Reason/s for the scarcity	Projected Number of Staff needed	Number of qualified persons imported from outside South Africa
OFO Code	Occupational Category			

SECTION E: SKILLS DEVELOPMENT

E1: Strategic objectives described in the entity's strategic or business plan																				
No.		List of Strategic Objectives																		
E2: Strategic Training Priorities of the entity derived from Strategic Objectives																				
No.		List of Training Priorities																		
E3: Planned beneficiaries of Training per occupational category, by gender, population group, disability status, age group and Local Municipality																				
Occupations		Male				Female				Total	People with Disability				Total	Age Groups			Geography	
OFO Code	Occupational Category	A	C	I	W	A	C	I	W		A	C	I	W		<35	<35-55	>55	Local Municipality	
E4: Planned training – unemployed (18.2)																				
OFO Code	Occupational Category									Number to be trained at										
										Entry level				Intermediate Level		Advanced Level				
E5: Planned training – employed (18.1)																				
OFO Code	Occupational Category									Number to be trained at										
										Entry level				Intermediate Level		Advanced Level				
E6: Planned AET training																				
AET										Total number to be trained										

SECTION F : REPORT ON TRAINING INTERVENTIONS

F1: Number of actual beneficiaries of training per occupational category, by gender, population group and disability status, age and geography.

Occupations		Male				Female				Total	People with Disability				Total	Age Groups			Geography
OFO Code	Occupational Category	A	C	T	W	A	C	T	W		A	C	I	W		<35	<35-55	>55	Local Municipality

F2: Number of beneficiaries who completed the training interventions – employed (18.1)

OFO Code	Occupational Category	Number to be trained at		
		Entry level	Intermediate Level	Advanced Level

F3: Number of beneficiaries who completed the training interventions – unemployed (18.2)

OFO Code	Occupational Category	Number to be trained at		
		Entry level	Intermediate Level	Advanced Level

F4: Total number of beneficiaries who completed AET programmes

AET Training	Total number of employees
AET	

F5: Expenditure of Training Budget

Type of Learning Programme	Employed	Unemployed

F6: Expenditure of Additional Budget

Source	Amount	Project

F7: Impact Assessment

Indicate how training as reported in this Annexure affected the company.	
Percentage of Payroll spent on training	

SECTION G : PLANNED PIVOTAL TRAINING

G1: Number of planned beneficiaries of training per occupational category, by gender, population group and disability status.

Occupations			Male				Female				Total	People with Disability				Total	Age Groups			Geography
OFO Code	Occupational Category	PIVOTAL Programme	A	C	I	W	A	C	I	W		A	C	I	W		<35	<35-55	>55	Local Municipality

G2: Number of verified beneficiaries of training per occupational category, by gender, population group and disability status.

Occupations			Male				Female				Total	People with Disability				Total	Age Groups			Geography
OFO Code	Occupational Category	PIVOTAL Programme	A	C	I	W	A	C	I	W		A	C	I	W		<35	35-55	>55	Local Municipality

G3: Planned training – unemployed

OFO Code	Occupational Category	PIVOTAL Programme	Number to be trained at		
			Entry level	Intermediate Level	Advanced Level

G4: Planned training – employed

OFO Code	Occupational Category	PIVOTAL Programme	Number to be trained at		
			Entry level	Intermediate Level	Advanced Level

G5: Expenditure of Training Budget

Type of Learning Programme	Employed	Unemployed

G6: Expenditure of Additional Budget

Source	Amount	Project

SECTION H : PIVOTAL TRAINING REPORT

H1: Number of planned beneficiaries of training per occupational category, by gender, population group and disability status.

Occupations			Male				Female				Total	People with Disability				Total	Age Groups			Geography
OFO Code	Occupational Category	PIVOTAL Programme	A	C	I	W	A	C	I	W		A	C	I	W		<35	35-55	>55	Local Municipality

H2: Number of verified beneficiaries of training per occupational category, by gender, population group and disability status.

Occupations			Male				Female				Total	People with Disability				Total	Age Groups			Geography
OFO Code	Occupational Category	PIVOTAL Programme	A	C	I	W	A	C	I	W		A	C	I	W		<35	35-55	>55	Local Municipality

H3: Number Trained – unemployed

OFO Code	Occupational Category	PIVOTAL Programmes	Number trained at		
			Entry level	Intermediate Level	Advanced Level

H4: Number Trained – employed

OFO Code	Occupational Category	PIVOTAL Programme	Number trained at		
			Entry level	Intermediate Level	Advanced Level

H5: Expenditure of Training Budget

Type of Learning Programme	Employed	Unemployed

H6: Expenditure of Additional Budget

Source	Amount	Project

SECTION I : GENERAL COMMENTS

(Insert any clarification or comment that you wish to make on any aspect of these Annexure Report. (Provide the number of the item that your comment refers to).

SECTION J: AUTHORISATION AND STAKEHOLDER SUPPORT DECLARATION

Section I of the template, with the original signatures, must be submitted to the skills development division of the relevant SETA by hand, post or fax by 30 April.

DECLARATION

We, the undersigned, submit this information in fulfillment of this entity's legal obligation in terms of the skills development legislation and regulations. We declare that, to the best of our knowledge, the information contained in this Annexure is accurate and up to date. We recognise that any inaccurate statement in this document may constitute fraud and be subject to the full penalty of the law.

SIGNATORIES

J1: Designated Signatory	Name and Surname	Telephone Number	Original Signature	Date
The person who completed these Annexure				
Designated employee representative				

AUTHORISATION

J2: DG or Head of Department				
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