



CHEMICAL INDUSTRIES EDUCATION AND TRAINING AUTHORITY (CHIETA)

Grants & Bursary Policy

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PART ONE

THE GRANTS POLICY

1 PURPOSE

- 1.1 This policy has been compiled to provide a framework for the administration, management, and disbursement of all the skills development levies received, and the discretionary, mandatory, and PIVOTAL grants awarded, monitored, and disbursed by the CHIETA in line with the Grant Regulations No 9867, promulgated in Gazette No. 35940 and amendments published in Government notice 23 of 2016.
- 1.2 This policy provides the basis for the CHIETA to disburse funds in line with the grants disbursement schedule in terms of criteria in regulations 4 and 6 and the dates by which applications for grants must be submitted as well as timeframes for disbursement of grants.
- 1.3 This policy ensures that the CHIETA is spending funds with a proper mandate and is setting pre-determined targets to ensure that funds are spent in a manner that is intended to achieve the set objectives. Without this policy, a SETA will be found in the annual audit performance conducted by Auditor General and the DHET to be spending funds without a proper mandate.
- 1.4 The policies are carefully framed to support the CHIETA sector strategy; otherwise it may find itself allocating funds in a manner that is conflicting with policy.
- 1.5 The policy is intended to ensure that CHIETA grant processes are transparent, fair and achieve value for money (impact of skills development interventions) spent on programmes and skills development interventions within the chemical industries. Member companies and stakeholders may be guided by this funding policy if they believe they are not being given adequate access to grants, or feel they are being treated unfairly. The policy is intended to make the system of funding allocation transparent and easily understood.

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- 1.6 This policy sets funding criteria, disbursement mechanisms and rules for the CHIETA programmes as per the Strategic Plan and Annual Performance Plan, which in turn support the National Skills Development Strategy (NSDS) III objectives.
- 1.7 This policy helps employers to understand the fundamentals of the Skills Development Levies Act No. 9 of 1999 (SDL Act) within the CHIETA context, Grant Regulations (Gazette No. 35940) and must be read in conjunction with the Income Tax Act No. 58 of 1962 Section 12H), the draft Learning Programmes Regulations (Gazette No.35489), draft Trade Test Regulations (Gazette No. 35625); the draft DHET national policy on artisan development and learner administration system; regulations limiting QCTO Scope; and public sector financial frameworks including Treasury Regulations and the Public Finance Management Act No. 1 of 1999 (the PFMA).
- 1.8 This policy includes the templates, format, and process for accessing mandatory and discretionary grants. This policy also serves as a control mechanism in addressing the risks identified through the CHIETA external and internal audit findings.
- 1.9 This policy is also intended to enable effective monitoring and evaluation of the skills development interventions funded by the CHIETA and to focus on numerical targets achieved, effective monitoring, measurement and impact evaluation. To this end, the CHIETA has adopted a Skills Value Chain approach to ensure alignment to our SSP, our Strategic Plan and APP, and in policies (funding) and procedures relevant to achieving impact. The disbursement of funds is managed to achieve the intended goals.
- 1.10 There is an alignment between the SSP, SP, and APP with the policies, systems, and processes to enable these plans to be implemented. Monitoring systems are put in place and evaluations are conducted based on clearly defined baselines and impact indicators and measured through mechanisms programme monitoring and evaluations, research, and impact analysis.

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- 1.11 This policy supersedes any prior grant guideline of the CHIETA. This policy will be valid for the entire SETA lifespan and may be reviewed as and when needed.

2 OBJECTIVES

- 2.1 The SETA Grant Regulations promulgated in December 2012 are intended to improve planning, eliminate wasteful expenditure and the unnecessary build-up of reserves, and speed up payments to those receiving grants. The Regulations address concerns with regards to poor planning, wasteful spending, unnecessary build-up of reserves and slow payments to those receiving grants. The Regulations also introduce a new percentage breakdown of the allocation of mandatory and discretionary grants, and a new type of grant, the PIVOTAL grant.

2.2 The Regulations:

- 2.2.1 Require SETAs to contribute to the cost of the Quality Council for Trades and Occupations (QCTO) for occupational qualifications and programmes registered at NQF Levels 1 – 6.

- 2.2.2 Intend to improve the quantity and quality of labour market information received by the SETAs in the form of workplace skills plans, annual training reports and PIVOTAL training reports to inform better skills planning in the sectors and thus nationally.

- 2.2.3 Promote National Qualifications Framework (NQF) registered and quality assured PIVOTAL programmes that address priority I skills needs identified in the CHIETA Sector Skills Plan including scarce and critical skills. PIVOTAL programmes address key skills needs in the sectors and include classroom and workplace learning as well as structured programmes which are pegged at NQF Levels 2 – 10.

- 2.2.3. Create a framework within which expanded use is made by the sectors of public education and training providers for the provision of skills development programmes. This refers

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specifically to public TVET Colleges, Universities of Technology and Universities for the provisioning of skills.

2.2.4 The CHIETA has considered the following policy options:

2.2.4.1 Option 1: Direct funds to PIVOTAL programme.

- 80% of CHIETA DG Funding to PIVOTAL programmes.
- 20% of CHIETA DG funding to NON-PIVOTAL programmes.

2.2.4.2 Option 2: Contain administrative costs.

- Admin costs under projects will be paid from the CHIETA 10% admin levy income.
- Project management costs will be paid out of the 20% Non-PIVOTAL DG funds.
- Project costs will be regarded as direct costs if they are critical to the success of the project.
- Project costs will not exceed 7.5% of total project costs.

2.2.4.3 Option 3: Reduce carry over and eliminate “reserves”.

- CHIETA shall disburse or commit through signed MoA 95% of the DG funds available by the end of March each year.

2.2.4.4 Option 4: Provide for funding of the QCTO.

- CHIETA will consider its QCTO scope of work and transfer up to 0.5% of total levy paid by the employer to the QCTO

2.3 The new funding model – percentages and types of Grants

2.3.1 In terms of SETA Grant Regulations Gazette 35940 of 03 December 2012 and the amendments published in Government Notice 23 of 2016 the levy grant system is allocated as below, thus in terms of the new Grant Regulations:

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- The CHIETA may keep 10.5% of the total payments received for administration costs but must transfer up to 0.5% to the QCTO for quality assurance functions. (Strategic Plan and APP to enable the 0.5 % amount to be paid to the QCTO monthly)
- The balance (49.5%) of the funds received (plus any surpluses from unclaimed mandatory grants or other sources) must be made available for discretionary grants; of which 80% must be paid for PIVOTAL programmes. 20% is available for Non-PIVOTAL programmes to implement the CHIETA SSP.
- These discretionary grants are thus to be used to implement the CHIETA's Sector Skills Plan (SSP) and the Annual Performance Plan (APP), which highlights the priority skills needs including scarce and critical skills of the sector (see Section 10 below for more detail on this process).

2.3.2 To give effect to this, the CHIETA is required to develop and adopt a Funding Policy and associated annexures, which outline how the SETA's finances and financial administration will be managed, how mandatory grants will be paid and what the quality criteria in relation to the payment of these grants will be, and what discretionary grants will be paid and for what programmes, including an outline of the PIVOTAL grants which will be available in this sector.

2.4 The CHIETA Funding Policy and Regulations, as outlined in this document, also addresses the following imperatives as outlined in the Regulations and taken from engagements with the Department of Higher Education and Training:

- Change of focus to quality and impact of skills development interventions. The CHIETA has spent its discretionary funds on the PIVOTAL related programmes;
- The focus of this policy is on the quality and intended impact of such programmes.
- The CHIETA defines in policy the PIVOTAL Programmes and criteria of how companies are to access such PIVOTAL grants.
- Intensify and increase work integrated learning (WIL).

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- Many skills development interventions require increased Workplace Integrated Learning (WIL) within the programmes or disciplines, to enhance their relevance and applicability.

2.5 The funding policy also clarifies terminology challenges in the current skills development legislative and regulatory framework including:

- Levies paid by employers;
- Administrative costs versus project costs;
- PIVOTAL programmes – define and identify PIVOTAL and Non-PIVOTAL programmes;
- Surpluses versus not committed funds; and
- Work Integrated Learning (WIL) versus workplace experience.
- Develop a funding mechanism and disbursement model for medium to longer term programmes.

2.6 Many scarce skills involve high level qualifications and require many years to address, often policies and implementation plans are short term, addressing one-year programmes only with no medium to longer term outcomes. The CHIETA will be able to fund learners on continuing programmes on a year-by-year basis within the available budget and approved by the Governing Board. This is based on a stakeholder resubmitting an application for funds in the next funding window.

2.7 Increase participation and enable funding of public education and training providers. Under the new funding policy, the CHIETA can fund and pay a public provider directly and no longer via an employer.

3 SCOPE

3.1 In terms of Regulation No. 9867, Sub-Regulation 3, a SETA must, in compliance with the Public Finance Management Act, establish bank accounts; and must use all monies received in terms of the Skills Development Levies Act to:

- Administer the activities of the SETA;

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- Pay employers their mandatory grants; and
- Implement its SSP and APP as contemplated in the Treasury Regulations issued in terms of the Public Finance Management Act, through the allocation of discretionary grants.

3.2 The funding policy therefore regulates all the CHIETA skills development levy-grant schemes. The funding policy is applicable to and must be always adhered to by all qualifying organisations and credible skills development providers participating in the CHIETA skills development interventions as approved by the Governing Board.

3.3 This policy is applicable to the CHIETA registered levy paying companies, non-levy paying companies exempted within chemical sector, skills development providers and other stakeholders who qualify to access the CHIETA mandatory grant, discretionary grant, PIVOTAL grants or strategic projects funding.

3.4 In the event this policy does not provide a solution to any problem relating to the administration and disbursement mechanisms for the CHIETA grants, the CHIETA Grants Committee should be approached to provide a final decision.

3.5 This policy has been developed in support of the national skills development imperatives and priorities including the NSDS III, The New Growth Path, IPAP, National Skills Accord, Green Accord, Beneficiation Strategy of South Africa, National Development Plan, Infrastructure Plan & SIPs, Rural Development Strategy, Environmental Strategy, HRD Strategy, the Green Paper on Post-school education and training and the Skills Strategy for the Economic Restructuring and Recovery Plan.

3.6 This policy must be applied to all CHIETA funding mechanisms and must adhere to the principles of fairness and equity and address the purpose of the Skills Development Act.

3.7 This funding policy is underpinned and supported by business systems and processes used by the CHIETA including but not limited to the CHIETA Management Information Systems, Accounting Systems and the ISO 9001-2008 Quality Management System to be put in place/developed/customised.

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4 DEFINITIONS AND TERMS

- 4.1 **An occupational qualification** means a qualification associated with a trade, occupation, or profession resulting from work-based learning and consisting of three components, knowledge, practical skills and work experience, and has external summative assessment. This also includes professional and vocational qualifications relevant to the chemical industry.
- 4.2 **Discretionary grant** means the money allocated within the SETA to be spent on discretionary grants and projects contemplated in regulation 3 (2) (C) to (9) as read with Regulation 6.
- 4.3 **Internships** mean the structured work experience component of qualifications at levels 2 - 10 on the NQF.
- 4.4 **Learnership** means a learning programme that leads to an occupational qualification or part qualification and includes an apprenticeship and cadetship.
- 4.5 **Learning programmes** include candidacy, which means practical and work experience training that is an occupational qualification as determined by the relevant professional body and follows the completion of an academic qualification required for access to the assessment for the issuing of a professional designation. This learning must lead to the issuing of a designation and/or qualification registered on the NQF.
- 4.6 **Mandatory grants** mean funds designated as mandatory grants contemplated in Regulation 4 to fund education and training programmes as contained in Annexure 2.
- 4.7 **“Surplus”** means a favourable residual balance in the statement of financial performance for the financial year ending 31 March less commitments to training of learners in

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programmes funded from discretionary funds; commitments in this context means contractual obligations exist at the end of the financial year that will oblige the SETA to make a payment or agreement (written) with specific terms between the SETA and the third party whereby the third party undertakes to perform something in relation to a discretionary project for which a SETA will be obliged to make payment against the discretionary grant.

- 4.8 **Structured learning component** means knowledge and practical curriculum components of an occupational qualification.
- 4.9 **Structured work experience component** means the workplace curriculum components of an occupational qualification.
- 4.10 **Work integrated learning (WIL)** means a process that formally integrates a student's academic qualification or part qualification with work experience in participating employer organisations.
- 4.11 **ABET** means Adult Basic Education and Training
- 4.12 **APP** means Annual Performance Plan
- 4.13 **AQP** means Assessment Quality Partner
- 4.14 **ATR** means Annual Training Report
- 4.15 **CHIETA** means Chemical Industry Education and Training Authority
- 4.16 **DHET** means Department of Higher Education and Training
- 4.17 **DQP** means Development Quality Partner
- 4.18 **TVET** means Technical Vocational Education and Training
- 4.19 **FLC** means Foundational Learning Competency
- 4.20 **GET** means General Education and Training
- 4.21 **HDSA** means Historically Disadvantaged South African
- 4.22 **MIS** means Management Information System
- 4.23 **MOA** means Memorandum of Agreement
- 4.24 **NLPE** means Non Levy Paying Enterprise
- 4.25 **NQF** means National Qualifications Framework
- 4.26 **NSDS** means National Skills Development Strategy

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- 4.27 **NSF** means National Skills Fund
- 4.28 **OFO** means Organising Framework for Occupations
- 4.29 **OHS** means Occupational Health and Safety
- 4.30 **PIVOTAL** means Professional, Vocational, Technical and Academic Learning
- 4.31 **QCTO** means Quality Council for Trades and Occupations
- 4.32 **RPL** means Recognition of Prior Learning
- 4.33 **SAQA** means South African Qualifications Authority
- 4.34 **SARS** means South African Revenue Service
- 4.35 **SDA** means Skills Development Act
- 4.36 **SDL** means Skills Development Levy
- 4.37 **SDL Act** means Skills Development Levies Act
- 4.38 **SDP** means Skills Development Provider
- 4.39 **SETA** means Sector Education and Training Authority
- 4.40 **SLA** means Service Level Agreement
- 4.41 **SME** means Small and Micro Enterprises
- 4.42 **SSP** means Sector Skills Plan
- 4.43 **WSP** means Workplace Skills Plan

5 POLICY STATEMENT

5.1 The Skills Development Act was passed by the National Assembly in 1998 (Act No. 97 of 1998). There have been two major amendments to the Skills Development Act, in 2003 and 2008. Shortly after the original Act was passed, in 1998, the Skills Development Levies Act was passed in 1999. The introduction of these Acts was aimed specifically at addressing the deep and profound skills shortages in the South African workforce, and at ensuring that the South African economy was able to grow and flourish through the development of a highly skilled, technologically able workforce.

5.2 The specific purposes of the Skills Development Act are outlined below:

- to develop the skills of the South African workforce;
- to improve the quality of life of workers, their prospects of work and labour mobility;

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- to improve productivity in the workplace and the competitiveness of employers;
- to promote self-employment; and
- to improve the delivery of social services;
- to increase the levels of investment in education and training in the labour market
- and to improve the return on that investment;
- to encourage employers--
- to use the workplace as an active learning environment;
- to provide employees with the opportunities to acquire new skills;
- to provide opportunities for new entrants to the labour market to gain work experience;
- to employ persons who find it difficult to be employed;
- to encourage workers to participate in learnership and other training programmes;
- to improve the employment prospects of persons previously disadvantaged by unfair discrimination and to redress those disadvantages through training and education;
- to ensure the quality of education and training in and for the workplace;
- to assist--
- work-seekers to find work;
- retrenched workers to re-enter the labour market;
- employers to find qualified employees; and
- to provide and regulate employment services.

5.3 To achieve this purpose, the Skills Development Act established several institutions and mechanisms, including the Sector Education and Training Authorities (SETAs), the National Skills Authority (NSA) and the workplace and sector skills planning and reporting mechanisms which are central to this funding policy. These institutions and mechanisms were given effect through the skills development levy-grant scheme introduced in the Skills Development Levies Act (No 9 of 1999) (SDLA), which is a compulsory levy scheme for the purpose of funding education and training in the workplace and in society more broadly. The SDLA came into operation on 1 September 1999 and the levy became payable with effect from 1 April 2000 and is payable by employers monthly. There have subsequently been several updates and amendments to this Act, principally through the issuing of Regulations.

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- 5.4 In general terms, the Skills Development Levies Act provides for the collection of a skills development levy of one (1) % of the total remuneration of all employees in companies with an annual wage bill of over R500 000. This levy is collected by the South African Revenue Services (SARS) and then paid over to the Department of Higher Education and Training. The Department then transfers -18% of the levies to the National Skills Fund, and the balance of the 80% is disbursed to SETAs proportionally based on the contributing companies' Standard Industrial Classification (SIC) codes.
- 5.5 SETAs are then responsible for disbursing these monies to companies within their sector in the form of skills development grants. The way these grants are disbursed, and the amounts disbursed, are subject to Government Regulations under the Skills Development Levies Act, and subsequent SETA Funding Policies and Guidelines.
- 5.7 This document sets out the new Chemical Sector Education and Training Authority (CHIETA) Funding Policy and Guidelines, effective 01 April 2021.
- 5.8 The Policy and Guidelines are intended to assist companies within the Chemical Sector to access grants from the SETA, in order that those companies can implement successful skills development strategies within their workplaces which contribute to individual company effectiveness and the overall growth and development of the Chemical sector within the South African economy.

6 LEGISLATION & REGULATIONS IMPACTING THE POLICY

6.1 The following legislation, regulations, policies and guidelines impact on this policy:

- Skills Development Act No. 97 of 1998, As Amended 2008 & March 2012;
- Skills Development Levies Act No. 9 of 1999;
- The Public Finance Management Act No. 1 of 1999;
- Income Tax Act No. 58 of 1962 (Section 12H);
- Manpower Training Act, 1981;
- Other legislation applicable to the chemical industries as identified in the CHIETA SSP;

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- Grant Regulations (Government Gazette No. 3590 dated 03 December 2012);
- Amendment Notice No 36655: SETA Grant Regulations, 15 July 2013;
- Grant Regulations (Government Gazette No 27801 dated 18 July 2005 as amended in Government Gazette No. 2958 dated 2 February 2007) and further amended in 2011;
- Learnerships Regulations of 2007;
- Draft Learning Programmes Regulations Government Gazette No 3589;
- Draft Trade Test Regulations Government Gazette No 5625;
- Government Gazette No. 35625 Listing of Occupations as Trades; and
- NQF Qualifications Sub Frameworks Gazette: 36003 dated 14 December 2012.

7 POLICY PRINCIPLES

7.1 This policy must at all time result in funding mechanisms that will support the prevailing strategic objectives of the CHIETA being:

- Support transformation of the sector through skills development;
- Support objective decision making for skills development through research in the sector;
- Enhance information management for skills development in the sector;
- Facilitate and support the development and implementation of core sector skills development programmes aligned with the sector qualifications framework;
- Enhance the monitoring, evaluation and review of the delivery capacity and quality of skills development in the sector; and
- Run an efficient, effective and transparent corporate governance system within a legal framework.

7.2 This policy will also strive to apply the following principles:

- Stakeholders may be rewarded or incentivised for their support for skills development;
- Allocation of funds based on equitable, fair and transparent processes without prejudice to any individual or stakeholder;
- Funding will support a sufficient number of skilled people to be absorbed into the mining and minerals sector;

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- Facilitate the funding of as many learners as possible as opposed to funding small groups of selected learners;
- Balance national performance agreement requirements with sector priorities;
- Minimise surpluses at the end of each financial year;
- Minimum administration processes and minimum number of grants and/or projects;
- Prevent wastage of funds;
- Availability of funds will determine whether certain projects and/ or grants are discontinued;
- Funding will be informed by the Sector Skills Plan (SSP) and Scarce Skills; and
- CHIETA will fund registered learning programmes that are approved by CHIETA.

8 FINANCES AND ADMINISTRATION OF THE CHIETA

8.1 In terms of Sub-Regulation 2 (1), the CHIETA may not use more than 10.5% of the total levies paid by the employer as allocated in the Act received in any year to pay for its administration costs in respect of that financial year, except if this is approved by DHET beforehand in writing. This amount may include the contributions received from public service employers in the national or provincial spheres of government and relevant national and provincial public entities for its administration costs (Sub-Regulation 2 (2)).

8.2 In addition, the Minister may grant written approval authorising a SETA to use an amount not contemplated in sub regulations (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.

8.3 In addition, and in terms of Sub-Regulation 2 (4), from 1 April 2013, the CHIETA will transfer an amount that does not exceed the regulated limit of the total levy paid by the employer to the QCTO for the quality assurance functions as contemplated in section 26H of the Act. The actual quantum of funds to be transferred will be determined by the Minister by 31 July of each year.

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- 8.4 In terms of Sub-Regulation 3 (3), the CHIETA must transfer any unclaimed mandatory funds and any interest earned thereon by 15 August of each financial year into the discretionary fund. Unclaimed mandatory funds apply to a levy paying employer that has not submitted a WSP-ATR (Annexure 2) to the CHIETA by the submission deadline of 30 April each year.

9 MANDATORY GRANTS

9.1 Legislative Framework

- 9.1.1 In terms of Regulation No. 9867, a mandatory grant must be paid to all employers who meet the prescribed eligibility criteria. This mandatory grant will not be in excess of 20% of the total skills development levies paid by the employer.

- 9.1.2 Mandatory Grants means funds designated as mandatory grants contemplated in Regulation 4 to fund education and training programmes.

9.2 Eligibility Criteria

- 9.2.1 As per Sub-Regulation 5(2), employers are eligible to claim the mandatory grant if they have:

- Have registered with the Commissioner in terms of section 3 (1) of the Skills Development Levies Act;
- Have paid the levies directly to the commissioner in the manner and within the period determined in Section 6 of the Skills Development Levies Act;
- Are up to date with the levy payments to the Commissioner at the time of the approval and in respect of the period for which an application is made;
- Have submitted a WSP and ATR in the required format and in the required timeframe, and which meets the criteria for implementation established and approved by the CHIETA;
- Medium (50- 149 Employees) and larger companies (> 150 Employees) must consult with employee representatives on the drafting and finalisation of the WSP/ATR. Where

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employers have recognition agreements with a trade union or multiple trades unions, they must have submitted a WSP and ATR which has been subject to consultation with the recognised trade unions and the WSP and ATR must be signed off by the labour representative appointed by the recognised trade union, using the format prescribed by the CHIETA.

- In instances where no consensus is reached between the employer and employee representatives on the WSP/ATR submission a written explanation must be submitted by the company with the submission, with proof of the consultation process. The CHIETA will evaluate the explanation on a case-by-case basis and based on the merit of the situation approve the submission. All supporting documents including proof of banking details must be submitted with the WSP/ATR final submission no later than the regulated timeframes.

9.2.2 Note that an employer may submit only one application per SDL number, and the employer's name must correlate with information received from South African Revenue Services (SARS) and DHET

9.2.3 The prescribed format and timeframe:

- The CHIETA requires that all employers (small, medium, and large) submit their WSP and ATR data via the CHIETA WSP-ATR application system. This system meets the minimum requirements for the WSP/ATR as set out in the Annexure 2 of the Grant regulations. The system requires that employers upload data and the WSP/ATR is then automatically generated.
- All data and submission of signed original WSP/ATR must be supplied by the required date of 30 April of each year as required by the regulations.
- Companies or enterprises that are exempted from the submission of the WSPs/ATRS (Annexure 1) to the CHIETA shall be eligible for the PIVOTAL Grants on proviso that such employers/enterprises submit completed PIVOTAL Grant Application Form which is accompanied by a PIVOTAL Plan and Report.

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9.2.4 CHIETA Quality Criteria. As required by the Regulations, the CHIETA is responsible for approving the WSP-ATR submission against defined quality criteria. The quality criteria adopted by the CHIETA Board in terms of this policy relate to completeness and to evidence of implementation.

In relation to completeness, the CHIETA shall consider a WSP as submissions on condition that all the following are in place:

9.2.4.1 Documents:

- WSP and ATR is submitted and captured via the application system by a company for all defined stages and tasks on the CHIETA Management Information System and all the requisite supporting documentation are submitted within a prescribed timeline of 30 April (not withstanding requests for extensions approved) in a relevant financial year.
- Supporting documentation includes:
 - If the bank details are not on the CHIETA system or have changed, proof of the company's banking details submitted, and is in the form of an original cancelled cheque, bank statement or letter from the bank (validated by the bank, not older than three months);
 - Completed and signed verification document generated by the submission system;
 - WSP/ATR generated by the submission system in terms of Clause 5 (2) (f) of the Grant Regulations (see Section 9.3 below) is signed by all relevant parties; and
 - The original of latter two sets of documents (verification and WSP/ATR) must be submitted to the CHIETA regional office.

9.2.4.2 Deviation between planned and actual training:

- The CHIETA will, from 1 April 2014, verify that variations between the WSP (planned training) and ATR (actual training) do not exceed 40%. In the case of variations exceeding 40%, the Skills Development Facilitator (SDF) of the company shall provide a

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written explanation using the space provided on the WSP/ATR report submission section generated by the system. The CHIETA shall consider reasons provided by the employer in writing for possible discrepancy between planned and actual training. This is a non-compulsory field.

9.2.4.3 Quality of source data:

- The CHIETA shall evaluate and approve the WSP-ATR submission in accordance with its criteria and guidelines. The insistence on receiving source data from employers is in line with the DHEST requirement that WSP-ATR submissions be verified. The SETA reserves the right to conduct site visits to verify the accuracy of the details provided for employees in the source data submission.
- The CHIETA will not approve submissions that did not use the lookup values provided in the source data templates. Companies must use the error reports generated by the system to correct all problems identified on the submission.
- All three sheets (Bio data, Scarce Skills, and in the source data template generated for each L number must be completed. If no scarce skills are reported the value “nothing to report” must be entered in space provided.
- N.B: See Annexure 1 of the Grants and Bursary Procedure for details on the process of submitting a WSP-ATR.

9.3 Consultation and signoff

9.3.1 As per the Regulations, where an employer has a recognition agreement with a trade union or multiple trade unions, evidence must be if consultation over the contents of the WSP-ATR has taken place and the authorized representatives of those unions must have signed the WSP-ATR for it to be approved.

9.3.2 The CHIETA requires that levy paying organisations must provide such proof of consultation: the CHIETA regards sign-off of the WSP-ATR by authorized and delegated personnel as proof of consultation and shall approve the WSP-ATR submission for payment accordingly.

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9.3.3 See Annexures 2 and 3 of the Grants and Bursary Procedure for guidelines on the establishment of Skills Development Committees/Training Committees and consultation matters. See Annexure 4 of the Grants and Bursary Procedure for the role of CHIETA Regional Offices in respect to mandatory grant applications.

9.4 Payment of Mandatory Grants to Qualifying Employers

9.4.1 The CHIETA will pay a qualifying employer on a quarterly or monthly basis. The CHIETA shall prescribe Mandatory Grants Submissions and Payment Schedule with timelines and publish such within the chemical industry. This schedule is included as Annexure 5 to this policy.

9.5 Request for extension for the submission of ATR-WSP

9.5.1 All entities that wish to submit their WSP/ATRs beyond the regulated submission date of 30 April, will be required to submit a request for extension, in writing (electronic or hard copy) no later than 30 April of each year. Any extension requests received beyond 30 April will not be considered unless it occurs that special requests for extensions of extensions are granted by the Minister due to unforeseen circumstances (in the case of a prolonged; civil war, floods, pandemic, military invasion, country wide industrial mass action etc) making it impossible to submit. Approval by The Grants Committee and the Governing Board through an electronic round robin process and or a formal meeting is required.

9.5.2 In terms of Sub-Regulation 3(4) the CHIETA shall place in the discretionary fund any unspent administrative funds and any interest earned on funds on 31 March of each financial year. The amount in the discretionary fund on 1 April each year, together with the discretionary allocation from the levy income received each month, must be spent, or committed through signed MoAs' in the ensuing eighteen months.

9.5.3 The CHIETA shall allocate 80% of its available discretionary grants within the financial year to PIVOTAL programmes that address priority skills including scarce and critical skills in its

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sector. The CHIETA shall set out in its APP a reasonable estimate of discretionary grants that will be available in the sector for training of priority skills through PIVOTAL programmes, which will receive grant allocations for training of learning and skills programmes identified as priorities set out in the SSP.

9.5.4 The APP must specifically set out how:

- the discretionary funds will be allocated to achieve the SSP outputs and outcomes; and
- the National Skills Development Strategy (NSDS) outputs and outcomes will be achieved in the sector by programme.

9.5.5 The CHIETA must state how the allocation of funds in the manner presented in the APP will achieve the impact in sector and how it will be measured. The CHIETA may for compelling reasons and circumstances, request the Director-General to approve the utilisation of the surplus in other ways, within the scope of the Skills Development Act and the National Skills Development Strategy.

9.5.6 At the end of each financial year, the CHIETA shall spend or commit (through contractual obligations) at least 95% of the discretionary funds 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. The remaining surplus of discretionary funds must be paid by the CHIETA by 1 October of each year into the National Skills Fund. Where exceptional circumstances have led to projected under spending of discretionary funds, the CHIETA will submit a business case to the Minister to request approval to carry over the surplus.

9.6 Disclaimer in the payment of mandatory grants to companies

9.6.1 The SETA Grants Regulation 4 on the allocation of mandatory grants has clause (6) which reads thus "the mandatory grant contemplated in sub regulation 1 must be paid to the employer quarterly every year or monthly". The CHIETA funding policy is aligned to the regulations.

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9.7 Grant Disbursement Schedule

9.7.1 Grant payments are made by CHIETA via a direct EFT into the company bank account. The reference on the bank statement is the Skills Development Levy number of the company.

9.7.2 CHIETA hereby adds a note in the mandatory grants' payment schedule stating that CHIETA is receiving levies from SARS/DHET 3 to 4 months in arrears. CHIETA will only pay mandatory grants if CHIETA has accurate levy information from DHET.

9.8 Non-Claimed Mandatory Grants

9.8.1 In terms of Clause 3 (3) of the Grant Regulations No. 35940, a SETA must transfer any unclaimed mandatory funds and any interest earned thereon by 15 August of each year to the discretionary fund; In terms of Clause 4 (7) of the regulations above, if the levy paying company 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 discretionary grant by 15 October of each year.

9.9 Exceptions

9.9.1 The CHIETA can only approve a Mandatory Grant with an incomplete WSP submission in cases where:

- A company has been newly established and has been operational for less than six months (and has submitted WSP but not ATR).
- The exception is based on the assumption that the newly established company did not conduct any training during the period under review and therefore is not in a position to submit an Annual Training Report.
- The CHIETA shall require an EMP 103 form from SARS as proof that the organisation is new.

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- The WSP submission or mandatory grant application has been submitted late to reasons of *force majeure* ('force majeure or an Act of God, as it is known' means an event beyond the control of the applicant and not involving the applicant's fault or negligence and not foreseeable. Such events may include, but is not restricted to, acts of the applicant in its sovereign capacity, wars or revolutions, fires, floods, epidemics).

9.10 Procedures to Direct & Control Changes made to Master Data

9.10.1 In terms of best practices an organisation should develop and maintain a system for changes to standing data (Change of banking details, address, contact number etc.) to be monitored. This will ensure that all changes made are reviewed and approved before being captured on the system.

9.10.2 CHIETA shall maintain a list or report of all employer organisations banking account details and a list of changes made to banking account details. Changes to bank account details are recorded in a register. An audit trail of changes made to employer organisation master data is maintained.

9.10.3 The CHIETA finance unit shall verify the following -

- That no employer organisations changed banking account details during the period under review;
- Different employers are not paid using the same bank accounts;
- That adequate segregation of duties is in place when receiving a change in banking details request, from capturing the change, reviewing, approving the change and record keeping;
- Clear and approved segregation of duties between official responsible for affecting changes and official responsible authorising changes on the system;
- System generated trail of changes entered prior to authorisation of changes on the system;
- Tangible record of verification of the accuracy and completeness of changes affected prior to authorisation of changes made on the system;

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- Automated safeguards in system to prevent changes to authorised data without override access facilitated at an executive management level, i.e. the CHIETA CFO to authorise access to rectify errors in authorised data; and
- Maintain a file for all evidence verifying that changes to standing data had been reviewed by the responsible official prior to authorising the changes to standing data on the system.

9.10.4 Discretionary Grants:

- Regulation 6 refers to allocation of discretionary grants by a SETA. The intention of the legislation and regulations is that discretionary grants are used as an incentive to employers to plan and implement training for their employees and create training and work experience opportunities for individuals.
- The purpose of the discretionary grant funding is for the SETA to use them to implement their SSP and to contribute to national targets.
- The grants set out in this policy are to ensure that the CHIETA deploys and achieves its objectives in relation to the development of the sector, achievement and implementation of the SSP and to make a meaningful contribution to national targets.
- Discretionary grants are allocated at the SETA's discretion to achieve its objectives in relation to the development of the chemical sector. Discretionary grants must not be a mechanism for reaching numerical targets but as a means of achieving intended impact in the chemical sector.

9.10.5 Key to Discretionary Grants is PIVOTAL grants, which must comprise 80% of all funding for discretionary grants.

9.11 Legislative Requirements

9.11.1 In terms of Sub-Regulation 6 of the Grant Regulations:

- A SETA may determine and allocate a discretionary grant in support of the implementation of its Sector Skills Plan, Strategic Plan and Annual Performance Plan;
- A SETA must develop its SSP by taking account of national strategic goals as set out in the NSDS, National Skills Accord and other relevant national priorities;

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- The APP must make clear how the SETA will allocate discretionary grants in a manner that prioritises the offering of skills development programmes to address sector needs through public education and training institutions;
- A SETA must, on an annual basis, and in accordance with any guidelines issued by DHET, approve a Discretionary Grants Policy, specifying how the SETA discretionary funds will be allocated to meet sector needs as set out in the SSP;
- The Discretionary Grants Policy must set out the funding framework, the different delivery modes and project types that will be deployed and the mechanism for SETA member organisations, as contemplated in sub-regulation (10), to access the discretionary grants;
- The Discretionary Grants Policy must set out how PIVOTAL programmes can be delivered through public education and training institutions;
- A SETA must prepare and distribute grant application and project proposal 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-governmental organisations and cooperatives in the sector to apply for any category of grant or participate in any type of skills development programmes as identified in the SETA Discretionary Grants Policy;
- The Discretionary Grants Policy must embrace the principles of transparency, openness, access and fairness.

9.11.2 The Discretionary Grants Policy must:

- 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;
- Provide procedures and communication strategy with potential beneficiaries as contemplated in sub regulation (10) that set out timeframes for processing of applications, communication of decisions, and payment schedules;
- Determine the proportion of discretionary grants that can be used for administration or project management purposes in the various grant and project categories provided it indicates that the prescribed maximum of any grant or SETA funded project is used for administration or project management costs; the CHIETA shall allocate project costs

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to the CHIETA Office to perform on the Monitoring & Evaluation, project management functions and;

- Ensure that value for money project funding is achieved and generally ensure that funds are spent on skills development to meet the sector needs. (Reports and learner tracer studies on intended impact, will be conducted via the research unit when and where possible)

9.11.3 A discretionary grant may be paid to a legal person, including –

- a public education and training institution;
- 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 Skills Development Levies Act; the CHIETA shall ensure a gradual decrease of funding to private providers and increase participation of workplace and public TVETs;
- other legal person contemplated in sub regulation (7) that meets the criteria for the payment of such grant; or
- an employer contemplated in section 30 and 30 (A) of the Act who has submitted to its relevant line SETA or Public Service SETA within the time frames specified in regulation 4 (2) and 4 (3), a format contained in Annexure 2.

9.11.4 A key focus of SETAs must be to address scarce and critical skills through programmes that are designed to address such skills needs, and which include work integrated learning.

9.11.5 At least 80% of discretionary grant funding must be allocated to PIVOTAL programmes as prescribed.

9.11.6 A SETA may allocate a maximum of 20% to funding of programmes other than PIVOTAL programmes, to develop the sector in accordance with the priorities outlined in the SSP. Allocation of discretionary grants by the CHIETA must consider the needs and size of the chemical industry subsectors.

9.11.7 In order to obtain discretionary grant funding for PIVOTAL programmes from a SETA, a legal person falling into the categories set out in sub-regulation (1) must complete and

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submit a PIVOTAL Plan using the WSP/ATR source data sections that identify PIVOTAL training. The PIVOTAL training report is an abridged source data sheet containing details of people busy with PIVOTAL training programmes, made available to employers in the same system used for the WSP/ATR submission process, as part of the discretionary grant approval cycle. Non-Profit Organisations, TVETs, Universities, Universities of Technology, Non-Levy paying, and small employers do not need to submit a PIVOTAL Plan and Report.

9.11.8 Companies employing more than 50 employees will also be required to complete the prescribed PIVOTAL Plan and report.

9.11.9 Allocation of discretionary funding and criteria

9.11.9.1 The CHIETA allocation of discretionary funding and criteria for the allocation of funding is guided by the Sector Skills Plan (SSP) and will be done using a discretionary grant for PIVOTAL programmes and discretionary 'projects approach' as approved by the Grants committee and Board. Funding will also be made available for Strategic Infrastructure Projects (SIPs), CHIETA designated trades and National Imperatives.

9.11.9.2 Priority skills areas funded are also guided by research conducted according to the CHIETA's Strategic Research Agenda, approved by the CHIETA Governing Board. All Grants applications shall be published in the national papers and/or advertised via the CHIETA website and/or communicated via electronic media for a minimum period of one (1) week to a maximum of thirty (30) days. Further extension/s to the funding window applications time period may be given, if upon evaluation by CHIETA Management; the applications received do not meet the prescribed funding indicator targets or for other valid reasons. The consideration of an extension to the deadline is in line with cost containment measures to ensure that funding window cycles are fully subscribed.

9.11.9.3 All grant applications including Strategic Projects grant applications shall be approved by the Grants Committee and ratified by the Governing Board. Late applications may be considered at the Grants Committees discretion for recommendation to the board for approval.

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9.11.9.4 Strategic funding can be applied for throughout the financial year; however these projects will still undergo the same evaluation process as projects awarded through a funding window. Strategic projects will not be subject to funding cap per learner rate, due to strategic nature of these projects.

9.11.9.5 The projects approach enables the CHIETA to utilise the discretionary funds to work through public institutions such as TVET Colleges, Universities and Universities of Technology, and to support small business, cooperatives, and SME development (through ring-fenced funding). It also enables the CHIETA to better measure the impact of such interventions.

9.11.9.6 The CHIETA through this policy sets out the specific criteria against which such funds are allocated, linked to agreed priorities within the chemical industries, measured for impact. Priority skills are identified through the SSP and captured in the APP: emphasis is placed on programmes that integrate theoretical and practical learning and address skills gaps by using work integrated learning programmes. The learning programme matrix contained in Annexure 6 describes the types of programmes which constitute PIVOTAL programmes.

9.11.9.7 The remaining 20% is for other interventions designed to implement Sector Skills Plans. Non-PIVOTAL programmes are identified in the APP of the CHIETA.

9.11.9.8 This discretionary grant policy also puts measures in place to ensure that discretionary grants are not monopolised by a few employers and providers, and that the key driver of skills development funding within the chemical industry is employer skills needs and not provider business needs. The discretionary grants evaluation criteria of the CHIETA shall be aligned to the stipulations of the grant regulations regarding allocation of funds.

9.11.9.9 In line with section 9 (iii) of the SETA Grant Regulations, a maximum of 7.5% of any grant or SETA funded project may be used for administration or project management costs. This allocation will be used by CHIETA for:

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- Salary related costs,
- Other overheads
- At the discretion of CHIETA, will be awarded as part of project management costs to successful DG applicants, where it is not possible to successfully complete a project without additional project administration costs being made available.

9.11.9.10 Allocation of CHIETA discretionary funding is applicable to grants, projects and PIVOTAL and Non-PIVOTAL programmes. Availability of discretionary funding for Discretionary Grants and/or Projects is subject to Governing Board discretion depending on affordability and may be reduced, withdrawn and/or cancelled upon informing the industry of the intentions to do so.

9.11.9.11 Discretionary grant values will be reviewed as required by the CHIETA Board to determine the total affordability of grants against available discretionary fund reserves and where necessary reduce or increase grant values as a result of the review. The disbursement of funding for projects and grants is subject to the CHIETA Governing Board discretion. The CHIETA reserves the right to reduce, withdraw, cancel or recover the grants and projects funds from an employer or skills development provider which was awarded or allocated grants by the CHIETA.

9.11.9.12 The discretionary grants and projects shall be governed by the disbursement rules as contained in in the signed memorandum of agreements.

9.11.9.13 The Request for Application of Discretionary Grants shall be published in the national Newspapers, Social Media platforms as well as on the CHIETA website. Further communication regarding the Applications status, approval, non-approval, amendments and/or any changes shall be communicated to the registered, Senior Organisation Representatives and/or the registered Skills Development Facilitator by the CHIETA.

9.11.9.14 The CHIETA will conduct site visits and or desktop reviews to all new Discretionary Grant funding project applicants to monitor capacity to deliver on projects. This will not be

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applicable to discretionary grant holders of a previous cycle 1 or 2 award, which is at the discretion of CHIETA management based on prior performance and delivery.

9.11.9.15 CHIETA will conduct a site visit to all companies that have been allocated discretionary grants in a financial year and will conduct verification of a 10% sample of the learners in training for validation purposes. The sample of learners cannot be less than 10% however it is at the discretion of CHIETA should they wish to conduct verification of more than 10% of the learners.

9.11.9.15 At the end of each financial year, the CHIETA must have spent or committed through actual contractual obligations at least 95% of discretionary funds available to it by the March of each year and a maximum of 5% of uncommitted funds may be carried over to the next financial year.

9.12 Discretionary Grants Disbursement Schedule

- The discretionary grants policy sets out the Discretionary Grants Disbursement Schedules for skills development interventions identified in the SSP. The CHIETA encourages participation of small businesses (small and micro enterprises) in the skills development interventions. These companies cannot train upfront and claim funds later or access funds on completion of the training at the same time, CHIETA cannot pay upfront with insufficient evidence of training underway. CHIETA tranche payments have a risk management component added to it.
- The CHIETA grant payment tranches for learning programmes (excluding artisan programmes) are linked to outputs as per the signed memorandum of agreement.
- All learning programmes will be subject to monitoring and verification by the CHIETA, in a financial year.
- A grace period of thirty (30) days or a month is granted to an employer(s) whose contracts have come to an end, but had evidence ready and/or submitted relevant

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evidence for payment by the contract end date. This is managed through the regional submissions.

9.12.1 Allocation of discretionary grants on a use-it-or lose-it principle

- This clause in the policy allows for rerouting or forfeiting of the discretionary grants award by an employer or enterprise if such an allocation/award remains unutilised or unclaimed within 6 months of signing the Memorandum of Agreement with CHIETA. Such unclaimed discretionary funds shall be swept and re-allocated within the same financial year, unless such employer or enterprise informs CHIETA of challenges experienced and requests an extension to the principle. The reallocation process may be through the opening of a new funding window or through the re-evaluation of applications from a prior window.
- An employer or enterprise requests for contract extensions shall be for a number of six (6) months from the date of expiry of the original contract and no further extensions will be granted unless the employer or enterprise reasonably demonstrates that failure to close out the contract was extremely beyond their powers.

9.12.2 Use it or Lose it Principle of the Discretionary Grant Award – First 6 months

- Discretionary grant award must be taken up by the allocated company within 6 months of signing the Memorandum of Agreement with CHIETA. All unclaimed discretionary grants shall be forfeited and shall be awarded at CHIETA's discretion to all eligible companies or enterprises approved for a discretionary grant in that financial year. This clause will be applied at the discretion of CHIETA Management processes, based on the reasons provided by the Organisation for late start to project.

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9.12.3 Sweeping / Withdrawal of Discretionary Grant Award

- Unclaimed discretionary funds shall be swept and reallocated into the discretionary grant fund on request by a stakeholder who has submitted such communication to CHIETA. In the case of expiring discretionary projects, CHIETA reserves the right to sweep or withdraw such award at the end or expiry of the contracting period without any formal communication informing the stakeholder of such, this is due to no further contractual obligations as outlined in the Memorandum of agreement.
- In the case of poor performance and/or non-delivery, partial delivery or on recommendation from the CHIETA Regional Monitoring and Evaluation team on discretionary projects, CHIETA reserves the right to sweep or withdraw such award before the end of the contracting period with or without any formal communication informing the stakeholder of such, this is due to no further contractual obligations as outlined in the Memorandum of agreement. This clause will be applied at the discretion of CHIETA Management.

9.12.4 Top up / Co-Funded Discretionary Grant Award

- Unclaimed or swept discretionary funds can be allocated as Top up or co-funded projects to eligible host employers or enterprises approved by the CHIETA for a discretionary grant in a financial year in support of the APP, SQMR and/or SSP achievement targets. Such a company must submit proof of placement for an occupationally directed programme and proof of registration of learners together with supporting documentation to qualify for a discretionary grant top up award. The top up grant is subject to approval by the Grants Committee and the Board. Addendums or MOAs shall be concluded with the employer for the awarding of the Top up Grants. This clause will be applied at the discretion of CHIETA Management.

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9.13 Project Types funded by the CHIETA through Discretionary Grants

9.13.1 PIVOTAL programmes should result in qualifications or part qualifications on the National Qualifications framework which are also registered with the QCTO.

9.13.2 Occupational qualifications and part qualifications between Levels one (1) and six (6) are required within the chemical industries. In terms of the Minister’s Notice in Gazette No. 36003 dated 14 December 2012, qualification types beyond level 6 on the Occupational Qualifications Sub framework have not been determined pending further notice.

9.13.3 The SETA Grant Guidelines refers to the classification of workplace-based learning which should be further disaggregated and standardised across all SETAs as per the table below¹.

Workplace-based learning (WP-BL)	
• Learnership	Registered learnership qualification on the NQF
• Apprenticeship	Listed trades
• “N” Diploma Internship	Part of a technical qualifications e.g., 18 to 24 months post N6
• Vocational internship:	Part of a vocational qualification. e.g., Diploma, National Diploma, Higher Certificate and Advanced Certificate as per Policy 150 and the HEQSF
• Professional Internship:	Part of a professional qualification e.g., Teacher, Social worker, Medical Doctor. [This form of internship is normally funded as part of the overall qualification.]
• Candidacy	Post-graduation requirement for professional designation /registration e.g., Professional Engineer; Lawyer; Accountant.

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<ul style="list-style-type: none"> Graduate internship 	Improve chances of employability in those occupations where there is no formal, quality assured prescription for workplace learning e.g., filmmaker
<ul style="list-style-type: none"> Mentorship 	Qualified person guides learner to competence

9.13.4 Detailed breakdown of funded PIVOTAL programmes is contained in the APP of the CHIETA. PIVOTAL programmes include non-core programmes (non-PIVOTAL criteria applies) used in the chemical sector.

9.14 Project types funded under the Discretionary Grants Learning Programme

The programmes and project types are subject to approval by the CHIETA Governing Board and budget availability.

9.14.1 PIVOTAL Programmes, include but not limited to (80%)

- Work Integrated Learning (WIL) Programmes;
- Lecturer / Trainer Development - TVET ;
- Lecturer Development – HET;
- Bursaries – Undergraduate (chemical industry disciplines) ;
- Bursaries - Postgraduate (chemical industry disciplines);
- WIL – Placement for Employment (HET/TVET/UOT);
- WIL – Placement for Work Experience (HET/TVET/UOT), including internships;
- Revised BBBEE & Transformation Support Programmes (only identified programmes);
- Strategic Infrastructure Projects (SIPs) (only identified learning programmes);
- Beneficiation Strategic Projects (only identified beneficiation value chains);
- Energy Skills Development Programmes and Projects (only identified learning programmes);
- Public Private Sector Support Projects (only identified learning programmes);
- Public TVET College Support Project (industry to specify in free text column);
- Public HET Support Project (industry to specify in free text column);
- Artisan learnerships (trade list);

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- Non artisan learnerships;
- Occupationally directed chemical industry programmes;
- Skills programme implementation; and
- Recognition of Prior Learning (RPL).

9.14.2 Non-PIVOTAL Programmes (20%)

- AET;
- National Senior Certificate for Adults (NASCA);
- Bridging Programmes (Second Chance Learners) – FLC, Maths & Science);
- HET Foundational Programmes (Academic Preparatory/Access Programmes, Chemical Industry disciplines);
- Foundational Learning Competence (FLC);
- Maths and Science Teacher Support;
- Maths and Science learner Support including Second Chance learners;
- Small and Micro Enterprises Development (Incubator, New Venture Creation);
- Rural Development Programme;
- Career Guidance & Establishing credible Partnerships;
- Institute of Sectoral Excellence (ISOEs);
- Youth Development Programmes;
- Rural Science Schools, Technical High Schools Support;
- Trade Union Capacity Building Programme; and
- Learners with Disability Support Cooperatives, Community Based Organisations, Non-Profit Organisations

9.15 Use of Discretionary Grant Funding for DG projects

The CHIETA Governing Board approves the strategic projects for a financial year, including the budget.

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9.15.1 CHIETA strategic projects

- The CHIETA PIVOTAL Grant is a grant available for employers/enterprises within the chemical sector and is aimed at addressing the priority skills needs including scarce skills needs as well as strategic projects identified through the CHIETA Sector Skills Plan. National Imperative and SIPs will also be funded.
- The Strategic Projects are approved by the Grants Committee and Board in a financial year. Strategic Projects can be classified as both PIVOTAL or NON PIVOTAL programmes.

9.15.2 The CHIETA Strategic Projects Funding Windows

- Institutional-Industry Partnerships (Chemical Sector) for Skills Development;
- Rural Development Projects;
- Temporary Employer / Employee Relief Scheme (TERS) Project;
- Small Business support;
- Skills Development Committee Support (Chemical Sector);
- AET and Learners with Disability Project (Chemical Sector);
- Trade Union Support;
- Maths/Science and Technology Education Teacher and Learner Support;
- Career Guidance and Development (Chemical Sector);
- Strengthen the human resource and skills base (CHIETA Research and Skills Planning Agenda);
- TVET College Support;
- Centres of Specialization (CoS);
- Community Education and Training (CET) Support;
- Support to Cooperatives, NGOs, CBOs and CBCs supported;
- Public Sector Capacity building; and
- Candidacy programmes.
- The strategic projects can be applied for throughout the financial year.

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9.15.3 Strategic Projects Grant Payment Tranches

9.15.3.1 The application process for strategic projects is conducted on the CHIETA Discretionary Grants Application System. The Payment schedule for projects is structured as follows:

- Tranche 1a : 15% - Signing of the MOA;
- Tranche 1b: 45% - Submission of project plan/rollout plan, learner schedule, id copies and learning contracts or confirmation of enrolment letter, where applicable;
- Tranche 2: 20% or 40% - payable at midterm or project midpoint subject to monitoring and submission of requested documentation as outlined in the MOA; and
- Tranche 3: 20% - payable upon completion of the project and submission of requested documentation as outlined in the MOA.

9.15.3.2 Deliverables are stated in the Memorandum of Agreement signed by CHIETA and the awarded party.

9.15.4 QCTO Support

9.15.4.1 In addition to the legislated amount of the 10.5% administration fee that SETAs are required to transfer to the QCTO in terms of the new regulations, the CHIETA is also required to fund Assessment Quality Partner (AQP) and Development Quality Partner (DQP) activities using the 20% of the Discretionary Grant funding policy available for non-PIVOTAL programmes. The 10.5% is the total for both the CHIETA administration and QCTO, being distributed as 10% to the former and 0.5% latter organisation.

9.15.4.2 Assessment Quality Partner (AQP) activities

- Assessor & Moderator Registration;
- PDA Standardised Assessment;
- Recognition of Prior Learning - Gap Training (Artisans);
- Certification Verification;
- External assessment specification tools development;
- Invigilators development;

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- Research and Development;
- Monitoring and evaluation of accredited assessment centres (Examinations inspections);
- Develop a website and publish relevant information;
- Secure a system to manage scheduled assessments;
- Recommend SDP's and assessment centres for accreditation;
- Develop an assessment framework; and
- Recruitment of required human resources and infrastructure.

9.15.4.1 Development Quality Partner (DQP) activities

- QCTO Qualifications Design - Listed Trades (Chemical Industries);
- QCTO Qualifications Design - Chemical Industries (Non-Trades);
- QCTO Qualifications Design - Higher Education and Training Chemical Industry disciplines;
- Learning Materials Development (CHIETA);
- Research and development;
- Learnerships Programme Development;
- Module of Employable Skills Programme Development;
- Chemical Sector Qualifications Framework; and.
- HEQC related programmes and qualifications ETQA to review.

9.15.5 Funding for Skills Research and Planning

9.15.5.1 In addition to the uses outlined above, the CHIETA may use the 20% of the allocation of the Discretionary Grants for non-PIVOTAL programmes for the following activities linked to Skills Research and Planning:

- Research;
- Skills needs analysis;
- CHIETA Research Agenda implementation;
- CHIETA Data Collection and Knowledge Management (including MIS Development);
- WSP-ATR - Mandatory Grants submissions;

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- Skills Development Facilitator Support; and
- Skills development Committee Support.

9.15.6 Discretionary Grant Timeframes for DG Projects

9.15.6.1 The CHIETA grants evaluation processes are aligned to the PFMA principles and embraces transparency, openness, access, and fairness. The CHIETA aims to award all projects in line with the skills development act and relevant related rules and regulations.

9.15.6.2 The CHIETA regional offices will conduct a pre-screening assessment of the grant application or due diligence, as part of the first level evaluation of the discretionary grants' applications. A Grants Evaluation Committee shall be appointed by the CHIETA CEO and will compile a summary of first level recommendations to the Grants Adjudication Committee also appointed by the CEO. The recommendation from Grants Adjudication Committee will be considered for approval by the Grants Committee. . This policy and process embraces transparency, openness, and fairness.

9.15.6.3 Upon approval by the Grants Committee and Board, both successful and unsuccessful discretionary grant and project applicants will be informed in writing. Upon approval of the successful service provider by the Evaluation Panel, a Memorandum of Agreement (MoA), which clearly sets out deliverables, timeframes, and the conditions, will be concluded.

9.15.6.4 The successful applicant will provide regular reports on the implementation of the project in line with the stipulations in the MoA. In line with section 9 (iii) of the SETA Grant Regulations, considering the maximum portion that may be used for administration or project management costs.

9.16 Process for Strategic Project Proposals and Applications

9.16.1 The CHIETA regional offices will conduct an assessment of the grant application and due diligence, as part of the first level evaluation of the discretionary grants' applications. A

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Grants Evaluation Committee shall be appointed by the CHIETA CEO and will compile a summary of first level recommendations to the Grants Adjudication Committee also appointed by the CEO. The recommendation from Grants Adjudication Committee will be considered for approval by the Grants Committee and ratification will take place by the governing board. This policy and process embraces transparency, openness and fairness.

9.17 Criteria for the Approval of Discretionary Grants Application

9.17.1 The applicant must be up to date with levy contributions unless exempt from paying levies or a public institutions;

9.17.2 If an applicant is a levy-payer, must have submitted an approved WSP/ATR for the preceding financial or current financial year;

9.17.3 The application for grants must be submitted through the CHIETA prescribed application process;

- The organization applying for discretionary grant funding must have made satisfactory progress with the projects awarded in the previous discretionary grant cycle/s; and
- The provider identified to deliver the training must be accredited with the relevant quality assurance body, or programmes as approved by the CHIETA, where applicable.

9.18 Items that will not be considered for Discretionary Grant funding under the learning window.

9.18.1 Items including, but not limited to, those stated below shall not be considered for discretionary grant funding unless funding is provided for by the department and/or approved in the SSP, Strategic Plan and APP of the CHIETA:

- Set up costs e.g. start-up costs;
- Capital expenditure;
- Policy development;
- Any programmes that are funded by the CHIETA in any other way;

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- Programmes already receiving full funding from other sources; and
- Sponsorships.

9.19 Reasons for rejecting a Discretionary Grant application

9.19.1 The CHIETA will reject a discretionary grant application if:

- The discretionary grant criteria aligned to the grant regulations are not met;
- The submission deadline has not been met; Such Applications might be considered at the discretion of the CHIETA Grants Committee;
- The CHIETA does not have adequate budget to allocate the required award;
- The CHIETA has identified the organisation as being high risk for applying for the Grants or as a poor performer from past experience;
- The CHIETA has identified that the organisation has been implicated or found guilty of unethical or fraudulent behaviour;
- The CHIETA has conducted a site visit and found conditions of the premise to be unsafe or non-compliant in terms of occupational health and safety standards; and
- The CHIETA has been denied access to conduct a site visit.
- No alignment to SSP
- Programmes not as per DG/SP advert

9.20 Monitoring and Evaluation of the Discretionary Grant funds

9.20.1 Monitoring and evaluation forms part of the CHIETA grants payment process. Monitoring function helps the CHIETA to collect and analyse information once the SSP, grants allocation, curriculum design, quality assurance and assessment activities processes are completed. It monitors the skills development interventions in terms of the targets in the APP and SQMR and informs MANCO on areas requiring attention. This helps the CHIETA to determine if the discretionary funds allocated are used appropriately. This also extends to within the CHIETA.

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9.20.2 The CHIETA Monitoring and Evaluation function is depicted on the Skills Value Chain for the chemical industry SETA. The Skills Value Chain clarifies what M & E for the CHIETA entails, how it is planned and how it's interlinked with key structures within CHIETA operations. This will help the CHIETA to know how well it is doing in implementing the grant regulations and the SSP as well as the impact that the skills development interventions supported by discretionary funding is making in the chemical industry.

9.20.3 The evaluation function allows the CHIETA to look at Memorandum of Agreement concluded with employers or enterprises and the discretionary projects awarded and the targets set as per the Annual Performance Plan and check progress made against the APP and the SQMR, implementation plans for the project, resources, project performance and consider stakeholder feedback. To this end, the CHIETA has introduced monitoring and evaluation across the skills value chain approach.

9.20.4 The CHIETA table of PIVOTAL and non-PIVOTAL programmes addressing the priority skills needs including scarce and priority skills needs of the chemical industries is contained in the Strategic Plan and the APP.

10 The revised Broad-Based Black Economic Empowerment Codes of Good Practice

10.1 New Codes of Good Practice in relation to BBBEE were issued in October 2012 (Notice No. 800 Government Gazette No. 35754, 5 October 2012). In terms of the measurement of the skills development element of Broad-based Black Economic Empowerment, clause 2.1.1 specifies the skills development expenditure on learning programmes for black employees and black employees with disabilities as a percentage of the leviable amount;

- Clause 2.1.1.1 refers to Skills Development Expenditure on Learning Programmes specified in the Learning Programme Matrix for black people as a percentage of Leviable Amount;
- Clause 2.1.1.2 refers to Skills Development Expenditure on Bursaries for black students at Higher Education Institutions; number of black people (unemployed) participating in learnerships, apprenticeships or internships as a percentage of employees;

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- Clause 2.1.1.3 refers to Skills Development Expenditure on Learning Programmes specified in the Learning Programme Matrix for black employees with disabilities as a percentage of Leivable amount; Clause 2.1.2.1 refers to the number of black people participating in Learnerships, Apprenticeships and Internships as a percentage of total employees;
- Clause 2.1.3 are bonus points for number of black people absorbed by the Measured and Industry Entity at the end of the Internship, Learnership and Apprenticeship programme under paragraph 2.1.2.1;
- The compliance targets for 2.1.1.1, 2.1.1.2 and 2.1.2.1 of the Skills Development scorecards are based on the overall demographic representation of black people as defined in the Regulations of the Employment Equity Act and Commission of Employment Equity Report as amended from time to time; and
- In determining a Measured Entity's score, the targets should be further broken down into specific criteria according to the different race sub-groups within the definition of black in accordance with the Regulations of Employment Equity Act and Commission of Employment Equity Report requirements on equitable representation and weighted accordingly.
- Clause 3 covers key measured principles and in subsection 3.1, it is specified that a measured entity will receive points on the skills development score card only if:
- Workplace Skills Plan, an Annual Training Report and PIVOTAL report which are SETA approved; and
- Implementation of Priority Skills programme generally, and more specifically for black people.

10.2 General Principles

- Contribute to the achievement of the country's economic growth and social development goals by developing skills that will enrich the creation of decent work and sustainable livelihoods;
- Promote the development of industry skills base in critical sectors of production and value-added manufacturing, which are largely labour incentive industries;

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- Support “Professional, Vocational, Technical, and Academic Learning Programmes”, achieved by means of professional placements, work integrated learning, apprenticeships, learnerships and internships that meet the critical needs for economic growth and social development; and
- Strengthen the skills and human resource base by encouraging support of skills development initiatives within an emphasis on skills development and career pathing for all working people to support employment creation.

11 Changes in levies received from SARS

11.1 If the CHIETA foresee a substantial drop in income from SARS due to incorrect classification of levy paying companies after administrative and projects budgets for a particular financial year have been approved, the CHIETA shall, through its Grants Review Committee, review the matter and recommend to the Governing Board appropriate measures to ensure the continuous sustainability of the CHIETA as a going concern.

11.2 The appropriate measures shall be inclusive of but not limited to the following interventions:

- Immediate review of budgets, priorities, projects and grants;
- Withdrawal of identified projects and grants;
- Cancellation of projects and grants;
- Identification of projects to be put on hold; and
- Informing the sector of any amendments without delay.

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PART TWO

THE BURSARY POLICY

12 PURPOSE

12.1 The purpose of the Bursary Policy is to:

- Facilitate and support learners from previously disadvantaged background on the critical and priority programmes in the higher educational and occupational levels;
- Support the workplace transformation for companies within the chemical sector;
- Promote increased access by previously disadvantaged learners with good and satisfactory academic performance to enter chemical industry fields of study and employment within the chemical sector;
- Attract school leavers with excellent Mathematics and Science results to enter into chemical sector fields of study;
- Provide for a funding mechanism and bridge in the value chain and pipeline of learning from career guidance, bursary, internships or work integrated learning and graduate development or candidacy programmes;
- Support chemical sector companies to upskill their workforce in the critical disciplines;
- Enhance access to workplace training opportunities by qualifying public FET learners and to support public FET Lecturer development;
- Establish credible partnerships to optimize the efficient implementation of the bursary programme;
- Regulate and standardise the CHIETA bursary grant levels, administration and disbursement mechanisms;
- Form linkages between member companies and learners on bursaries.

13 OBJECTIVES

13.1 The objectives of the Bursary Policy is:

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- The identification of critical and scarce skills in the Sector Skills Plan (SSP) supporting PIVOTAL programmes and occupations within the sector;
- Incentivising existing employer/enterprise/relevant public sectors by allocating bursary grants to priority fields of study as per the bursary discretionary grants approved by Governing Board.
- The allocation of bursaries to qualifying public FET/TVET College learners and lecturers in the critical disciplines required within the chemical sector;
- Facilitating the development of Non-Employer (non-bounded) learners by providing bursary grants to employers who provide work experience opportunities to Non-Employer (non-bounded) learners;
- Conducting Learner Tracer Studies project under the Research and Skills Planning Unit to assess the impact of this bursary intervention to qualified recipients of CHIETA's bursary funding (hereinafter referred to as "Bursars") within the chemical sector and to evaluate the effectiveness of the CHIETA bursary funding;
- Streamlining and increasing the monitoring and verification of CHIETA Bursary Programme through a network of CHIETA Regional Offices;
- The provision of programme support and appropriate skills training where required for CHIETA Bursars to maximize their chances of success and completion of their studies on record time.

14 SCOPE

14.1 The CHIETA bursary scheme and policy terms and conditions, as detailed in this document, are applicable the following programmes, schemes and applicants:

- to undergraduate and postgraduate bursaries programmes as approved from time to time, by the CHIETA Governing Board;
- bursaries allocated by Governing Board through the CHIETA discretionary grants;
- bursaries applied for through the Discretionary Grant (DG)-application process by employees and training providers;

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- the CHIETA Bursary Scheme (Learners that apply directly with CHIETA for bursaries) which is managed internally by the CHIETA; and
- the Bursary funding allocated to and administered by NSFAS (National Student Financial Aid Scheme).

15 POLICY PRINCIPLES

The following guiding principles will assist with the effective implementation of the CHIETA Bursary Funding:

- 15.1 Principle 1- “Fields of Study to Skills” which means the matching of each field of study for which a need was identified in the CHIETA Sector Skills Plan to one or more occupations, defined in the CHIETA Occupations Handbook, 2014, or subsequent amended versions of the handbook. To support the NATIONAL SKILLS DEVELOPMENT PLAN (NSDP) 2030 Outcomes (effective 1 April 2020) “4.1 Identify and increase production of occupations in high demand” and 4.2 “Linking education and the workplace”]
- 15.1.1 Annual analysis of the CHIETA’s relevant bursary target as determined in the Department of Higher Education and Training’s (DHET) Strategic Plan and Annual Performance Plan and addressing the priority or PIVOTAL skills requirements;
- 15.1.2 Seamless integration of the CHIETA Work Skills Plan (WSP) submissions process with the bursary discretionary grants application process and adjust the fields of study where necessary;
- 15.1.3 A well-coordinated process for addressing priority or Professional, Vocational, Technical and 16.1.4 Academic Learning (PIVOTAL) skills through the effective application of the CHIETA Bursary Funding;
- 15.2 Principle 2- Compliance by Employer/Enterprise Criteria for the Allocation of CHIETA Bursaries An Employer/Enterprise employing more than 50 employees:
- 15.2.1 Bursaries shall be allocated to a qualifying employer/enterprise provided that:

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- 15.2.1.1 Employer/enterprise has submitted an approved WSP to the CHIETA;
- 15.2.1.2 Employer/enterprise has submitted a PIVOTAL Plan and PIVOTAL Training Report (for the bursary programmes to the CHIETA to access the Discretionary Grants; this PIVOTAL Training Plan and Report is the same as the Annual Training Report (ATR)-WSP Source data;
- 15.2.1.3 Employer/Enterprise submits a Discretionary Grants application (i.e) means an application for monies allocated to strategic, PIVOTAL and Non-PIVOTAL Projects by CHIETA to ensure that CHIETA achieves its objectives in relation to the development of the chemical sector and implementation of CHIETA's SSP;; during the funding window grants application period in a financial year to the CHIETA for approval by CHIETA Governing Board. The CHIETA shall issue a call for Discretionary Grants applications for the bursary funding window through the advertisement in the national newspapers and various other social media platforms such as Twitter, LinkedIn.
- 15.2.1.4 Adequate funds are available to support the full complement of Bursars for the full duration of the academic year of the approved course;
- 15.2.1.5 Priority shall be given to continuing existing CHIETA Bursars as opposed to approving new applications, in the allocation of bursaries subject to availability of funds and approval of bursary allocations by the Governing Board or CHIETA Bursary Committee;
- 15.2.1.6 Bursary allocations and budget are approved by the CHIETA Governing Board for a relevant financial year. For the Bursary Scheme learners, the allocations are approved by the CHIETA Bursary Committee.
- 15.2.2 An Employer/Enterprise employing less than 50 employees and exempted from submitting a WSP to the CHIETA:
- 15.2.2.1 In the case of enterprises exempted from submitting the WSP to the CHIETA, such enterprises must have completed in full the CHIETA bursary grant application forms for a relevant financial year during the funding window period; and

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15.2.2.2 Criteria 4.2.1.3 to 4.2.1. 6 shall be applicable and binding to enterprises employing less than 50 employees.

15.3 Target Group of the CHIETA Bursary Funding:

- The CHIETA Bursary Funding shall apply to learners studying through various institutions towards a qualification that is relevant to the Chemical sector.
- Qualifications may be related to core and support occupations in the Chemical Sector, as defined in CHIETA Occupations Handbook, 2014, or subsequent amended versions.

15.4 The CHIETA bursary fields of study:

15.4.1 The CHIETA Bursary Funding shall be applicable to both employed and unemployed bursaries. Such study fields are informed by the CHIETA SPP and can include but not limited to (These fields are prioritised in the bursary allocation process):

- Analytical Chemistry;
- Biochemistry;
- Chemical Engineering;
- Biomedical Technology;
- Mechanical Engineering;
- Polymer Technology;
- Pharmacy;
- Operations Management;
- Electrical Engineering;
- Environmental Science;
- Industrial Engineering; and
- Bachelor of Science

15.4.2 The CHIETA broad study fields:

15.4.2.1 The study fields supporting the various occupations within the chemical sector include but not limited to:

- Agriculture (Fertilizers subsector);

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- Astronomy and Astrophysics;
- Atmospheric Sciences and Meteorology;
- Biodiversity & Ecology;
- Biology, General;
- Botany/Plant Biology;
- Business Administration, Management and Operations;
- Chemical Engineering;
- Chemistry;
- Civil Engineering;
- Construction Engineering;
- Ecology, Evolution, Systematics and Population Biology;
- Economics;
- Electrical, Electronics and Communications Engineering;
- Engineering Mechanics;
- Environmental Management;
- Environmental/Environmental Health Engineering;
- Environmental/Environmental Health Management;
- General Sales, Merchandising and Related Marketing Operations;
- Genetics;
- Geology and Earth Sciences/Geosciences;
- Health and Medical Administrative Services;
- Health and Safety Management;
- Human Resource Management and Services;
- Industrial and Organisational Psychology;
- Industrial Design;
- Industrial Engineering;
- Logistics and Supply Chain Management;
- Management Sciences and Quantitative Methods;
- Manufacturing Engineering;
- Mathematics and Statistics;
- Mechanical and Mechatronic Engineering;
- Medicine;

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- Medical Clinical Sciences;
- Medical Radiologic Technology/Science (Radiography);
- Metallurgical Engineering;
- Mining and Mineral Engineering;
- Nuclear Engineering;
- Operations Research;
- Petroleum Engineering;
- Physical Sciences, General;
- Physics;
- Project Management;
- Public Health;
- Public Health Management;
- Quality Management;
- Rehabilitation and Therapeutic Professions;
- Specialised Sales, Merchandising and Marketing Operations;
- Taxation;
- Veterinary Biomedical and Clinical Sciences;
- Veterinary Medicine;
- Zoology/Animal Biology;
- Pharmacy, Pharmaceutical Sciences and Administration;
- Pharmacy and Community Pharmacy, General;
- Pharmacy Administration and Pharmacy Policy;
- Pharmaceutics;
- Medicinal and Pharmaceutical Chemistry and Drug Design;
- Natural Products Chemistry and Pharmacognosy;
- Pharmacoeconomics/Pharmaceutical Economics;
- Clinical, Hospital and Managed Care Pharmacy;
- Industrial and Physical Pharmacy and Cosmetic Science;
- Pharmacy, Pharmaceutical Sciences and Administration, Other;
- Veterinary Toxicology and Pharmacology;
- Pharmacology and Toxicology;
- Pharmacology;

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- Molecular Pharmacology;
- Neuropharmacology;
- Pharmacology and Toxicology;
- Pharmacology and Toxicology; and
- Psychopharmacology.

The study fields are reviewed by the CHIETA annually at the end of the WSP cycle in a financial year.

15.4.2 Bursary qualification types:

15.4.2.1 The following are the bursary qualification types as funded and supported through the PIVOTAL Bursary Grant Funding Window:

- (Undergraduate): National Diploma;
- (Undergraduate): National Certificate;
- (Undergraduate): National First Degree;
- (Postgraduate): National Higher Diploma;
- (Postgraduate): National Further Diploma;
- (Postgraduate): Honours Degree;
- (Postgraduate): Masters Degree;
- (Postgraduate): Doctoral Degree; and
- (Postgraduate): Post-Doctoral Degree.

15.4.2.2 Eligibility Criteria: All candidates applying for CHIETA Bursary funding must satisfy the institutional entrance requirements and provide CHIETA with all required documentation as outlined in the bursary application and bursary contract or DG application and Memorandum of Agreement (MOA).

15.4.3 Post graduate bursaries:

15.4.3.1 CHIETA's Sector Skills Plan states that CHIETA will support Honours, Research Masters, Doctoral and Post-doctoral graduate in relevant fields. CHIETA's Strategic Plan and Annual performance Plan identifies post-graduate targets per annum.

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15.4.3.2 CHIETA's bursary policy is aimed at addressing skills development in support of priorities identified in the Sector Skills Plan in relation to key occupations, learning areas and research.

15.4.4 Post graduate bursary fields of study:

The CHIETA Bursary Scheme shall apply to fields of study that are informed by SSP priorities and reviewed on an annual basis.

15.4.4.1 Post graduate bursaries – Research related

- Approach to post-graduate research:
 - The implementation of post-graduate research bursaries should support CHIETA's research approach, agenda and needs as identified in the SSP and by CHIETA structures. This includes the building of sustainable research partnerships with relevant public higher education and training institutions.
 - CHIETA may provide post-graduate research bursaries in fields of study additional to those in the CHIETA Bursary Policy for under-graduate studies which are relevant to the CHIETA's research agenda and themes. Such fields of study could include the Social Sciences and economics.
- Qualifying criteria for post graduate bursaries
 - Post graduate bursaries fields of study are as per the CHIETA priorities identified in the SSP and the scorecard indicators. The post-graduate research fields may be in support of either industrial or skills development research. These Bursars should contribute to the pool of researchers in the chemical industry which could be broader than skills development;
 - The applicant should have completed a relevant undergraduate degree, where applicable;
 - The applicant should have satisfied university entrance requirements to a post graduate programme.

15.5 CHIETA bursary funding:

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15.5.1 The CHIETA Board shall endeavour to allocate funds annually to facilitate and support learners in need of bursaries. Such funding will be made available under the Discretionary (PIVOTAL) Grants and Strategic Projects, subject to availability of funds. Bursary funding will be granted for a [maximum of one academic year] and continuation will be subject to availability of funds in the new financial year and provided that the learner or organisation complies with bursary obligations.

15.5.2 NSFAS bursary funding:

CHIETA and NSFAS shall enter into an agreement which will be renewable on an annual basis subject to the sole discretion and approval of the CHIETA Governing Board. The agreement will highlight the funding allocation and all terms and conditions applicable to this partnership.

15.6 CHIETA bursary grant levels

15.6.1 The CHIETA Undergraduate bursary funded through the Discretionary Grant application will be capped to a maximum of R45 000.00 per unemployed learner [(18.2)] and capped to a maximum of R30 000.00 per employed learner [(18.1)] in an academic or financial year. Unemployed learners [(18.2)] funded through the CHIETA Bursary Scheme will receive a grant to the maximum of R45 000.00.

Funds can also be used to pay for 18.2 student debt which will allow for a learner to complete their studies and access their final qualification or/ degree statement which will be used to access employment opportunities. In such cases of payment of student debt, a reassessment of the amount owing can be made and approved in excess of the above 18.2 maximum cap of R45 000.00 up to a maximum of R90 000.00 per 18.2 learner.

15.6.2 The CHIETA Post-Graduate bursary funded through the Discretionary Grant application will be capped to a maximum of R60 000.00 for both [18.1 and 18.2 learners] in an academic or financial year. Unemployed learners (18.2) funded through the CHIETA Bursary Scheme will receive a grant to the maximum of R60 000.00.

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- 15.6.3 The bursary shall cover tuition as determined through statement of account. The fees shall be paid directly to the Institutions on behalf of the Bursars in the case of the bursary awarded through the CHIETA Bursary Scheme.
- 15.6.4 Subject to availability of surplus funds from the capped amount as stated in 4.6.1 and 4.6.2, textbooks costs and accommodation (approved by the institution) shall be covered at the discretion of CHIETA for the bursary funded through the CHIETA Bursary Scheme. The bursar shall be expected to produce documentary proof of expenditure to be reimbursed. Arrangements can be made with CHIETA Management to have invoices for books and accommodation paid directly to the supplier on receipt of a valid invoice.
- 15.6.5 In the event where there is a surplus of funds remaining in the tertiary institution's account, the funds shall be refunded to CHIETA and not the bursar except in the instance where the bursar can prove that the surplus funds were financed through a loan or any other external funding source. This is only applicable for the bursary funded through the CHIETA Bursary Scheme.
- 15.6.6 Documentary evidence required as per the signed Memorandum of Agreement between CHIETA and the employer must be submitted to CHIETA by the employer for the bursary funded through the Discretionary Grant application before funds are released. The funds shall be disbursed as per the tranche disbursement percentages stated in the Memorandum of Agreement.
- 15.6.7 The evidence required and payments for CHIETA Bursary Scheme shall be disbursed as per the tranche deliverables and disbursement percentages stated in the Bursary Agreement between CHIETA and the bursar.
- 15.6.8 Not all applicants meeting the specified qualifying criteria of the CHIETA Bursary Scheme shall necessarily be interviewed or awarded a CHIETA Bursary. The allocation of Bursaries to candidates remains at the discretion of CHIETA Management based on budgets approved by the CHIETA Grants Committee and Governing Board.

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15.7 Funding model for exceptional cases

15.7.1 All Bursars funded through the Discretionary Grant Application process will receive a maximum capped amount, as per clause 4.6.1 and 4.6.2;-

15.7.2 In the case of learners that have no need but have achieved academic excellence] will be funded through the CHIETA bursary scheme will receive a maximum capped amount, as per clause 4.6.1 and 4.6.2;

15.7.3 In the case of learners that have a need but have not achieved academic excellence who will be funded through the CHIETA bursary scheme will receive a maximum capped amount, as per clause 4.6.1 and 4.6.2; and

15.7.4 In the case of learners that have a need but have achieved academic excellence who will be funded through the CHIETA bursary scheme will receive funding for 100% of his/her tuition, accommodation, and books. Such funding is at the discretion of CHIETA Grants Committee and CHIETA Governing Board.

15.7.5 Notes:

15.7.5.1 Academic Excellence, as used herein refers to a learner that has passed all subjects at tertiary level with an average of 67% or obtained an average of 80% for his matriculation subjects.

15.7.5.2 Need –Learners will be required to submit supporting documentation to prove need. Only learners that have submitted the relevant documentation and based on the outcome upon evaluation will be recognized as learners with a need.

16 Bursary Awarding Conditions.

16.1 The award of the bursary through the CHIETA Bursary Scheme shall be subject to the following conditions namely:

- The applicants are accepted for the course at the academic institution.

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- Should an applicant be registered with an academic institution which does not comply with the requirements of qualifications, as specified by the CHIETA, the applicant shall not be awarded the bursary;
- Applicants have signed a Bursary Agreement with the CHIETA for an academic year; and
- The applicant does not have any existing bursary with another institution, employer/enterprise or bursary funding agency unless in the case of the top up of the bursary funds. If it is found that the applicant has an existing bursary covering the full cost of the fees, the CHIETA bursary shall be forfeited automatically and redirected to the next qualifying learner at the discretion of the CHIETA. CHIETA shall reserve the right to demand and pursue amounts paid to an applicant who wilfully breached this condition of the bursary award.

17 Duration of a bursary.

17.1 Bursaries shall be granted for a maximum of one (1) academic year provided that the bursar complies with the bursary obligations. CHIETA Management reserves the right when necessary to fund the learner retrospectively for fees outstanding from a previous academic year and then to continue funding in the new academic year, if necessary. No precedence is set that a learner will be funded for the entire qualification. Funding will be granted on an annual basis.

18 Service Obligation

18.1 The awarding of a bursary through the CHIETA Bursary Scheme will be subject to the following obligations:

- Applicants are obliged to enter into a bursary contract with the CHIETA. The CHIETA may, in its sole discretion, waive the service obligation in which event the Bursars shall agree that they have no claim whatsoever against the CHIETA as a result of such waiver.

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19 Bursary continuation, Suspension, and Reinstatement

In exercising its discretion whether the bursary is to be continued, suspended or reinstated, as the case may be, the CHIETA shall take into account academic results, as well as additional factors including but not limited to:

19.1 Academic results

19.1.1 Bursars who pass their examinations shall be prioritised for a re-award, subject to the availability of funds. The bursar or organization must re-apply on an annual basis and be approved by relevant CHIETA structures. The funding does not roll over to subsequent years. There is no precedent set or rule established in practice that learners will be funded for more than the period specified in the contract (between the learner and CHIETA or Employer and CHIETA). CHIETA will make every endeavours to support continuing learners, subject to availability of funds and CHIETA approval.

19.1.2 Bursars who fail more than one module shall automatically be removed from the bursary scheme. Bursars who have been removed from the bursary scheme may re-apply for a bursary upon successfully completing the failed modules at their own expense subject to the academic institution permitting them to register for all the qualifying modules required to be completed for the succeeding year of study.

19.1.3 Bursars who fail a single module shall be allowed to continue provided that the results of the other modules passed indicate that the Bursars will be able to cope with the new modules as well as the repeat module.

19.1.4 The bursary scheme shall not cover the cost of repeat modules.

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19.1.5 Bursars who have failed one or more module/s, who are in work experience at the time of receiving their results shall be allowed to continue with the work experience but will be expected to complete the module/s at their own cost.

20 Employment of CHIETA bursars

20.1 Bursars shall, upon graduating, be eligible for work experience or work placement within the chemical sector employer subject to approval of such grants to the employer by the CHIETA Grants Committee. CHIETA is not obliged nor does CHIETA undertake to guarantee to employ Bursars upon completion of their qualification.

21 Dispute Resolution

21.1 All disputes arising from the application of this policy shall be submitted forthwith to the Chief Executive Officer of the CHIETA who will act as informal and non-binding mediator. If not resolved within one month after the matter has been referred to the Chief Executive Officer, either party has the option to refer the matter to the CHIETA Grants Committee, and then Governing Board.

21.2 Only after the dispute has been referred to the CHIETA Governing Board for consideration, may the dispute be referred to arbitration in terms of the rules of the Arbitration Foundation of Southern Africa, if either party is not satisfied with the resolution of the CHIETA Board. Either party shall not be precluded from approaching any competent court for relief or to hear the dispute or to exercise any other right that it may deem necessary in law against the other party.

22 Review of the Policy

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22.1 This policy shall remain in force for the duration of SETA's lifespan and shall be updated when substantial changes to the legislation framework warrants amendments to changes arise from CHIETA internal process.

23 ASSOCIATED POLICIES

23.1 The Grants and Bursary Policy must be read in conjunction with the following:

- CHIETA Recruitment and Selection Policy,
- CHIETA Learning and Development Policy,
- CHIETA Grievance Policy and Procedure,
- CHIETA Disciplinary Policy and Procedure, and
- CHIETA Grants and Bursary Procedure.
- SETA Grant Regulations
- CHIETA Conflict of interest Policy

24 APPROVAL AND VERSION CONTROL

This policy is effective from the 1 April 2021 until 31 March 2022.

APPROVED BY CHIETA GOVERNING BOARD ON: _____

CONFIRMED BY CHIETA CEO:

Next Review Date: 1 April 2022

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