



**APPLICATION FORM FOR BANKSETA 2016/2017 PIVOTAL GRANT FUNDING:
LEARNERSHIPS**

CATEGORY

**PLEASE
SELECT**

EMPLOYED 18.1

UNEMPLOYED 18.2

LEARNERS WITH DISABILITIES (18.2 only)

I/ we acknowledge that this application **will only be considered to be complete if the following criteria were met:**

CRITERIA	Check
This application form is completed on full	
The employer/ organisations' Quality Management Plan (QMP) is included	
A Project/ Implementation Plan is included	
Proof of Training Provider accreditation is attached	
Employment Commitment letter (specific to unemployed programmes) &/ Exit Strategy is included	
The application form is duly signed off in all the designated areas	
Complete and originally signed learnership agreements, and certified copies of supporting documentation: copy of ID, highest qualification for each learner will be provided to the BANKSETA no later than 14 October 2016. Approved Funding may be reconsidered if incomplete learner agreements are submitted.	

Contact Details

Company/ Bank Name:	
BANKSETA Registered Levy no.	L
Physical Address	
Postal Address	
Learnership Contact person:	
Telephone: Landline Cell	
Fax number:	
E-mail address:	

Project Details

Learnership Title and Registration number	
Registration Number as registered with the Department of Higher Education and Training	
Training Provider/ Profess. Body	
Total Amount applied for: R (inclusive of VAT)	
Project start and end date <i>(Overall project timeline/ start with planning and end with close-out)</i>	Start End
Training Programme start and end date <i>(actual <u>training</u> period/ exclude planning and close out)</i>	Start End
Project summary (A brief overview of the project and what it will achieve)	

Business Case (Please see Note 5 & 6 below)

1. The background to the project

- a Brief description of the learning schedule that the learner will follow in the workplace for the duration of the programme.
- Description of workplace support that will be available to the learner.
- How and why did this project originate?
- What skills priorities are addressed through this project?
- Explain the links between this project and the priorities indicated in the Sector Skills Plan
- Who will participate in the project?

2. What specifically will the project deliver?

- Identify and describe each deliverable

3. What are the benefits of the project to the banking sector?

- Identify and describe each benefit
- Indicate who the beneficiaries of the project will be:

Province	Black / Coloured/ Indian		White		Disabled		Youth (max 35 years old)	TOT AL
	Male	Female	Male	Female	Male	Female		
TOTALS								

4. What are the costs? Provide a detailed breakdown of the budget. Ensure to include these items:

- Learner allowances
- Learner leave pay
- Wages/ Salary/ Bonus
- Training Provider fees
- Travel and/ Accommodation

Budget Required			
Budget Item	# Learners	Cost per Learner	Total
1.			
2.			
3.			
4.			

5			
6.			
7.			
8.			
Total			
Other Contributions (Indicate the sources of internal co-funding)			
1			
2.			
3.			
4.			
5.			
Total Other			
Grand Total			

5. How will the success of the project be evaluated?

- Give details of proposed methods to be used

Project Plan

The project plan must include all the deliverables mentioned above, the milestones and the budget. (See page 5)

Provide details of how the project will be resourced.

- Own staff, consultancy etc.
- Details of proposed project manager

A final report is required to give feedback on the project progress leading up to closure. The types of elements that need to be incorporated in this report include:

- Risk Management
- Deviations from Project Aims and Objectives (Mitigating factors for deviation)
- Lessons Learned
- Challenges, achievements and successes
- Financial Management / Corporate governance procedures

NOTES

1. **Please complete all the applicable sections in as much detail as possible.**
2. If insufficient space has been provided, please add additional sheets.
3. This application should be read in conjunction with the BANKSETA PIVOTAL Grant Funding Window Guidelines
4. Responsibilities of the APPLICANT

The APPLICANT will have responsibility for the following, which includes (but is not limited to):

- Overall project management
- Reporting to the governance structure of the project and to the BANKSETA
- Procurement*
- Financial management including record keeping.

NOTE: The APPLICANT will be held liable for any financial mismanagement

5. **Project Plan, Budget, Governance**

The application is to be accompanied by a draft project plan, which must incorporate details of the project budget.

Included within the draft project plan and budget should be details of the project governance and of the proposed project manager.

All budgets are to be **inclusive of VAT.**

6. **Ownership of deliverables, Copyright and BANKSETA Acknowledgement**

The material generated by a project, funded by a BANKSETA approved Discretionary Grant, will be the property of the BANKSETA.

Copyright in all such material shall vest in the BANKSETA.

Acknowledgement of funding by the BANKSETA is to be incorporated into all project documentation, deliverables and training material.

7. The Protection of Personal Information Act, No 4 of 2013 promotes the protection of personal information by public and private bodies. The BANKSETA is in full support of the PoPI Act, and will disclose information only to ensure compliance in terms of the PIVOTAL reporting requirements

**BANKSETA MIS
TRAINING PROVIDER QUALIFICATION AND ACCREDITATION**

This form should be completed by the designated training provider.

Employer Name	
Levy number	
Provider Name	
Provider Levy Number	
Provider Registration number	
Provider Contact Details (Contact person name, telephone number and email address)	
Is the provider loaded on the MIS system?	
Is the qualification loaded on the MIS system?	
Is the qualification BANKSETA accredited? If yes, please provide accreditation number If no, please confirm SETA accreditation and number	
Qualification Name	
Department of Labour Number	
SAQA ID	
NQF LEVEL	
UNIT STANDARD NUMBER AND DESCRIPTION	

Generic Project Plan Template: *Please adapt according to specific organisational needs*

Task Name	Duration (Days)	Start	Finish
BANKSETA Pivotal Grant Funding 2015			
Training Programme Category & Name			
Planning			
BANKSETA to confirm approved funding ito application for funding			
Finalise detailed project plan			
Procure services of providers			
Workplace preparation			
Signing of MOA with the BANKSETA			
Selection : Employed learners			
Employers submit full details of nominated employees on template to HR			
HR approve/ decline nominated employees			
Selection : Unemployed learners			
Advertisement			
Recruitment and Selection			
Implementation			
Briefing and Contracting sessions			
Source Documentation			
Meetings with Providers			
Tracking of project plan			
Provide BANKSETA with original copies of agreements incl. supporting documents			
Raise first tranche invoice			
Maintain Database			
Update training results			
Update BANKSETA database with terminations etc			
Quality Assurance			
Monitor progress against QMP			
Close Down			
Document and distribute activities			
Submit close out report			
Raise final tranche invoice			

Authorisation

We, the representatives from _____ (Bank Name) confirm that the information contained in this proposal are correct and commit to ensuring that the project meets its stated objectives.

APPLICANT Roles	Name	Title / Designation	Date	Signature
Senior Manager				
Project Manager				
Skills Development Facilitator (SDF)				

Declaration

I _____ (name of applicant) declare that I will comply with the requirements of BANKSETA for all reporting required for the project and supporting documentation that may be required.

I further declare that:

- I will ensure my availability and presence at BANKSETA Quality Assurance Visits
- Complete and originally signed bursary agreements, and certified copies of supporting documentation: copy of ID, highest qualification and proof of learner registration for each learner will be provided to the BANKSETA no later than 14 October 2016.

Approved Funding may be reconsidered if incomplete learner agreements are submitted.

Name of BANK representative : _____

Title/Capacity of BANK representative : _____

Signature of representative : _____

For BANKSETA office use only

Number of learners applied for	
Total Value of application	
Funding application reference number	
Date Stamp application received	