

Desktop Strategic Partnerships & Special Projects Evaluation Form for 2025/2026 FY

Name of Applicant: _____

Section A: Desktop Evaluation of Special Projects and Strategic Partnership Applications

Criteria	Description	Indicate Applicable Yes/No/N/A	Confirmation of Information
General			
1. Levy or Non-Levy paying Application	<p>1.1 LGSETA Levy-Paying Entities: including Metros/District Municipalities and Local Municipalities as well as Municipal Entities and Local Government Entities and Agencies, etc.</p> <p>1.2 Non-Levy Paying Organisations to LGSETA that support local government context including federations, NPOs and CBOs/NGOs, Cooperatives, SMMEs (including SDPs), professional bodies, research organisations, etc</p> <p>1.3 TVET Colleges/Private Colleges; 1.4 HEIs (Public/Private), 1.5 Government Departments and entities, 1.6 International Entities 1.7 Other Specify _____</p>	Confirm	

Criteria	Description	Indicate Applicable Yes/No/N/A	Confirmation of Information
2. What is the focus of the project	Qualification Development LGSETA Strategy related Research related International project High School support project Non-formal/informal/non-credit bearing training Other Specify _____	Confirm	
3. Is this a strategic partnership or special project ? Choose one	Strategic Partnership or Special Project as per definition in the DG SOP 1. Special Project -Innovative to make greater impact 2. Strategic Partnership -Private or Public Entities - Funded, none-Funded and Co-Funded -DDM broad service delivery -Distressed Municipalities -Professional Development -Strategic Sectoral, National Priorities	Confirm	
	What makes the proposal special?	Confirm	

6a. What is the nature of the project for Non-training Intervention	Description of the project (including but not limited to research, qualification development) Name of programme	Confirm	
6b. Who is the Target audience?	Description of the target audience as per the application	Confirm	
6c. Where will the project be implemented and name of Province	Place of implementation (area)	Confirm	
6d. Indicate stakeholders in the project where applicable	Yes/No Role of stakeholders	Confirm	
7. Project for Training Interventions			
7a. Name the training interventions (eg, learnership, skills programme etc)	List of training interventions	Confirm	
7b. Indicate the name of the training provider appointed	Name of Training Providers and Accreditation status	Confirm	
7c. Location of the project Confirm and indicate name of province (area)		Confirm	

Criteria	Description	Indicate Applicable	Confirmation of Information
----------	-------------	---------------------	-----------------------------

<p>7d. Confirm accreditation of service provider if training related intervention</p>	<p>Confirm and indicate accreditation status and programme approvals are valid and current at the time of application.</p> <p>Verify learnership/qualification registration status (correct SAQA ID if qualification valid and current)</p> <p>Proof of appointment of service provider (SLA/Appointment letter/ MOA/MOU)</p> <p>Proof of registration of Assessors and Moderators. Qualification of Facilitators</p>	<p>Confirm</p>	
<p>7e. Beneficiaries</p>	<p>Indicate number of employed and/or unemployed beneficiaries</p>	<p>Confirm</p>	
<p>8. Contribution to Equity</p>	<p>Confirm and indicate number of black</p> <ul style="list-style-type: none"> • women • persons with disabilities • youth including Not-in-employment, education and training (NEET) 	<p>Confirm</p>	
<p>9. Contribution to: 9.1 Rural learners 9.2 Urban learners</p>	<p>Confirm and indicate number of learners from rural and/ or urban areas contributing to sector priority occupation/skills priority areas;</p>	<p>Confirm</p>	

Criteria	Description	Indicate Applicable	Confirmation of Information
10. Type of intervention – Formal/ Non- Formal Compulsory for training interventions and non-training (indicate which intervention(s) chosen)		State Yes/No/Partial/ or N/A	
10.1 Learnership	Confirm name , level and linkage to LGSETA Strategic Focus Areas and occupational priorities and skills gaps or national/provincial/district priority skills areas	Confirm	State information relevant to Intervention, if chosen
10.2 Apprenticeship	Confirm name,level and linkage to LGSETA Strategic Focus Areas and occupational priorities and skills gaps or national/provincial/district priority skills Areas	Confirm	State information relevant to Intervention, if chosen
10.3. Internship/Work Experience	Confirm name and level of Qualification and linkage to LGSETA Strategic Focus Areas and occupational priorities and skills gaps or national/provincial/district priority skills areas	Confirm	State information relevant to Intervention, if chosen
10.4 WIL for University/TVET	Confirm Name and Level of Qualification and linkage to LGSETA Strategic Focus Areas and occupational priorities and skills gaps or national/provincial/district priority skills areas	Confirm	State information relevant to Intervention, if chosen

Criteria	Description	Indicate Applicable	Confirmation of Information
10.5. RPL/ARPL	Confirm name, level of Qualification and linkage to LGSETA Strategic Focus Areas and occupational priorities and skills gaps or national/provincial/district priority skills areas	Confirm	State information relevant to Intervention, if chosen
10.6 Skills Programme (PIVOTAL)	Confirm name , level of Qualification and LGSETA Strategic Focus Areas and linkage to occupational priorities and skills gaps or national/provincial/district priority skills Areas	Confirm	State information relevant to Intervention, if chosen
10.7 Short Course (Non-PIVOTAL)	Confirm name of programme and relevance to the LG sector and skills gaps	Confirm	State information relevant to Intervention, if chosen
10.8 Bursaries	Confirm name, level of Qualification and LGSETA Strategic Focus Areas and linkage to occupational priorities and skills gaps or national/provincial/district priority skills areas	Confirm	State information relevant to Intervention, if chosen
10.9 AET	Confirm Basic Education Programmes level 1 – 4 and NSC Programme	Confirm	State information relevant to Intervention, if chosen
10.10 Candidacy	Confirm name of the professional body candidacy linked to priority occupational/skills areas	Confirm	State information relevant to Intervention, if chosen
10.11 Extra Classes for Matric (Grade 12)	Confirm name of Training/Service Provider offering Mathematics/Physical Science/Accounting & Technology	Confirm	State information relevant to Intervention, if chosen

10.12 Other (Indicate)	Confirm -non-formal, non- training intervention name and linkage to LGSETA Strategic Focus Areas and occupational priorities and skills gaps or national/provincial/district priority skills areas	Confirm	State information relevant to Intervention, if chosen
-------------------------------	--	---------	---

Criteria	Description	Indicate Applicable	Confirmation of Information
Quality Assurance			
11. Confirm workplace approvals for relevant interventions	Confirm if LGSETA has approved workplace or if workplace has been approved by another SETA (It remains the responsibility of the SETA to approve workplace(s). Workplace approval only applies to learnership, apprenticeship, work integrated learning (WIL), internships or candidacy. List of mentors provided for workplaces is indicated. Workplace approvals for hosting of learners to be validated during due diligence.	Confirm	
12. Funding (training and non-training interventions) Is the cost breakdown indicated in the application?	Confirm Yes/No Confirm alignment of the costs of interventions to funding policy for indicated interventions.		

Criteria	Description	Indicate Applicable	Confirmation of Information
----------	-------------	---------------------	-----------------------------

Allocation of Discretionary Grants			
13. Recommendation of Desktop Analysis for Further Evaluation	<p>Outline Reasons if application is approved or not, and indicate reasons why and/or if there are issues that were identified:</p> <p>-Confirm if the application has been signed by the Accounting Officer or Delegation of Authority has been provided.</p>	Confirm	

Section B1: Evaluation Criteria Definition for Section B only

Scale	Rating	Definitions (Choose and/or Modify as Appropriate)
3 points	Addresses requirements clearly	<p>Applicant addresses all aspects of the criteria and demonstrates an ability to successfully meet LGSETA requirements to ensure effective performance. All criteria were met; no deficiencies exist in the areas assessed.</p> <p>Evidence provided demonstrate the likelihood of successfully meeting the LGSETA requirements to ensure effective performance.</p>
2 points	Partially addresses requirements	<p>The applicant has not met some of the criteria. Some deficiencies exist in the areas assessed and are of major concern.</p> <p>The evidence presented partially demonstrate the likelihood of successfully meeting the LGSETA requirements to ensure effective performance.</p>
1 point	Not clear in addressing requirements	<p>Applicant does not adequately address the criteria. The evidence presented does not demonstrate the likelihood of successfully meeting the LGSETA requirements to ensure effective performance. Not all the criteria were met; deficiencies exist in the areas assessed and are of major concern.</p>
0 points	No Information	<p>Applicant did not provide any relevant information and/or submit any documents required.</p>

Section B2: Evaluation Scoring Criteria for Special Project/Strategic Partnership Application

DESCRIPTION	WEIGHTING/POINTS	SCORES	COMMENTS
<p>1. Purpose of the Proposal and Strategic/ Special Intent - Confirm what the proposal is aiming to achieve for the special project/strategic partnership</p> <p>-Confirm how does the proposal link to any of the following:</p> <p>Response to LGSETA Strategic Focus Areas Occupational Shortage (Scarce Skills) and Skills Gaps (Critical Skills)/LGSETA Discretionary Grant Strategic Priority Areas /District Development</p>	<p>3 = addresses clear project purpose 2= partially addresses project purpose 1= proposal not clear in terms of purpose 0 = no information</p>		

DESCRIPTION	WEIGHTING/POINTS	SCORES	COMMENTS
<p>2. Target Group/ Beneficiaries/ Participants</p> <p>2 a. Training Intervention</p> <ul style="list-style-type: none"> - Beneficiary status (employed or unemployed) <ul style="list-style-type: none"> -Equity details of the or beneficiaries - Geographical location of beneficiaries (Rural or Urban) <ul style="list-style-type: none"> -Indicate any learner with disability status and nature of disability, if included -Indicate how the learners will be recruited. <p>2b. Non-Training Intervention</p> <ul style="list-style-type: none"> - Participants (employed/unemployed/ Community etc.) <ul style="list-style-type: none"> -Equity details of the participants/ beneficiaries - Geographical location of the project -Indicate any persons with disability and nature of disability, if included -Indicate how the beneficiaries/participants will be recruited. 	<p>3= addresses all project demographics (learner status, equity details, location of the project, no of learners with disabilities, recruitment of learners)</p> <p>2= addresses 3-4 project demographics details 1= proposal provides less than 3 of the areas 0 = no information</p>		

<p>3. Training Provider, if relevant</p> <ul style="list-style-type: none"> - Indicate the training provider - Indicate accreditation details of training provider (attach proof). - Indicate the appointment letter of SDP/SLA/signed between SDP and Employer/proof of panel of providers. 	<p>3 = addresses the training provider 2= partially addresses the training provider 1= proposal not sufficient on training provider 0 = no information</p>		
<p>4. Details of the project applied for</p> <ul style="list-style-type: none"> - Indicate name of project and/or learning intervention and SAQA ID. - Is the project /intervention credit bearing, non- credit bearing or non-training? 	<p>3 = full details of the programme applied for that includes learning intervention, qualification, SAQA ID and credits where applicable 2= Provided 3 out of the four required field (Learning intervention, qualification, SAQA ID and number of credits) 1= Provided 1 or 2 out of the four required field (Learning intervention, qualification, SAQA ID and number of credits) 0 = no information</p>		

DESCRIPTION	WEIGHTING/POINTS	SCORES	COMMENTS
<p>5. Indicate the duration of the project/learning intervention.</p> <ul style="list-style-type: none"> -Indicate mentors/ Project leader (where applicable) - Indicate whether workplace approval was done by the LGSETA or by other SETA, if relevant. (where applicable) 	<p>3= a detailed submission indicating the duration of the project/learning intervention with mentors indicated and workplace approval.</p> <p>2=submission of mentors and workplace approval</p> <p>1=partial submission of either mentors or workplace approval.</p> <p>0 =no information</p>		
<p>6. Project Implementation</p> <ul style="list-style-type: none"> - Detailed Project Plan to be attached in the proposal - Method of delivery of project/ learning intervention training e g, (blended/face to face/e-learning etc.)where applicable 	<p>3 Project implementation that includes the training implementation and/or the project implementation is provided for non-training</p> <p>2= submission of either a training implementation or project implementation</p> <p>1= submission of an implementation plan with no details (no timelines and no clear activities)</p> <p>0 = no information</p>		
<p>7. Opportunities Upon Completion – Exit Strategy.</p> <ul style="list-style-type: none"> - Indicate how the project / learning intervention will impact on learner’s life. - Indicate any employment opportunities upon 	<p>3 = a detailed exit strategy of how the successful completed learners will be either absorbed or assisted with self employment. Not applicable for non-training (full score to be given)</p> <p>2= partially addresses how the learners will be assisted with no actual details.</p> <p>1= No clarity on opportunities upon completion requirements</p> <p>0 = no information</p>		

<p>completion/ absorption /placements/self-employment (eg,Will the organisation employ them, negotiate employment with other employers, etc)</p>			
---	--	--	--

DESCRIPTION	WEIGHTING/POINTS	SCORES	COMMENTS
<p>8. Capacity to manage the project/learning intervention (Provide evidence for both applicant and/or SDP).</p> <ul style="list-style-type: none"> - Indicate experience in project management. - Project/ learning Intervention name - Client/Legal Name of contracting institution - Project budget - Number of learners - Project/learning intervention duration (with start and end dates) 	<p>3 = a detailed input of the project team is provided to demonstrate capacity to manage project with supporting evidence 2= partially submitted information about the project team with no evidence 1= No clarity on capacity to manage project 0 = no information</p>		

<p>9. Previous Experience in Managing Similar Project/ Learning Intervention. (eg, Provide evidence for both applicant and SDP if training project or evidence for non-training projects)</p> <p>- Indicate if any SETA/organisation funding (or other sponsor) received previously and performance in this regard (attach proof)</p>	<p>3 = a detailed list of projects demonstrating previous experience in managing similar project with supporting evidence is provided 2= partially addresses previous experience in managing similar project 1= No clarity on previous experience in managing similar project 0 = no information</p>		
<p>10. Budget</p> <p>-Budget based on actual costs and cost per beneficiary analysis.</p> <p>-Cost per Years if more than one year, if applicable</p>	<p>3 = Budget linked to project requirements for the training and all related costs 2= partially provides budget linked to project requirements and costs 1= proposal not linking budget to project requirements and costs 0 = no information</p>		

DESCRIPTION	WEIGHTING/POINTS	SCORES	COMMENTS
<p>11. Risk and mitigating factors</p> <p>- Indicate the risks and provide mitigating factors for managing these risks</p>	<p>3 = addresses risks and mitigating factors linked to project activities 2= partially addresses risks and mitigating factors linked to project activities 1= proposal not linking risks and mitigating factors to projects activities. 0 = no information</p>		

Final Recommendation and Score		Score	Comments
<p>12. Recommendation for Due Diligence</p>	<p>Application meets the necessary requirements including appropriate learning intervention (s) outlining:</p> <ul style="list-style-type: none"> • Purpose and strategic intent • Details of the project/ learning intervention • Project implementation plan • Risks identified and mitigation plan • Capacity to deliver project successfully and timeously • Beneficiaries • Duration period • Budget programme/ learning intervention costs aligned to the project plan 	<p>Indicate overall score</p>	<p>Outline reasons if application is approved or not and indicate reasons why and/or if there are any issues that are identified.</p> <p>NB: List the recommended interventions, and/or qualification details, and number of beneficiaries and type of beneficiaries e.g., 18.1 or 18.2, if applicable to training intervention application</p>

Section C: Declaration

Description	Yes/No	Confirmation of Information
<p>Declaration</p> <p>1. Validate the following in the application:</p> <p>1.1 Full name of person responsible for the application</p> <p>1.2 Position in the organization</p> <p>1.3 Confirm if application has been signed</p>		
<p>2. First Evaluator</p> <p>2.1 Full name of person responsible for the Evaluation: _____</p> <p>2.2 Position in the organization: _____</p> <p>2.3 Signature: _____</p> <p>2.4 Date: _____</p>		

3. Second Evaluator

3.1 Full name of person responsible for the Evaluation: _____

3.2 Position in the organization: _____

3.3 Signature: _____

3.4 Date: _____

SECTION D: SCORE THRESHOLD

The minimum threshold of 21 points (70%) will proceed to due diligence phase.

Evaluation Scale	Scoring	Evaluation Outcome
0 - 69%	0 - 20	Not Proceeding to Due Diligence Phase
70% -100%	21 - 33	Proceeding to Due Diligence Phase