

# Monthly Review

The latest news, off the press to you

May 2007

Working together for a skilled tomorrow

## • Discretionary Grant Projects-Year 8

INSETA is about to begin rolling out its new Year 8 projects. These projects are designed to address the skills gaps identified by our comprehensive research into the scarce and critical skills in the Insurance sector. Based on the research which results in a Sector Skills Plan, each SETA determines the criteria for these initiatives as well as the amount of the Grant, which is dependent upon the funds available.

These INSETA projects are funded by Discretionary Grant funding, which comes from 20% of the total skills development levy paid by

the employers in the sector. This means that up to a further 20% of levy can be claimed back from this Discretionary Grant fund if your company trains staff using INSETA-specific training programmes or initiatives.

These projects are:

- Skills Development Facilitator Training
- ABET
- Better Business Toolkit for SMME Brokerages
- FAIS Fit and Proper
- Internships
- Learnerships
- Training of Black Actuaries, Financial
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Managers and Investment advisors

- Insurance Leadership Programme for Black Graduates
- Career Guidance
- Capacity Building of Black Training Providers
- New Venture Creation for Black brokers
- New Venture Project DoL SLA.

We are excited about these projects as we believe they will further assist the transformation agenda of the sector. •

## • FAIS Focus

The deadline date for Brokers and Financial Advisors, Assistance Brokers and other employees who were employed in the Insurance Industry in 2004 to comply with the FAIS Fit and Proper Determination is currently **30**

**September 2007**. This affects some 30 000 Brokers and Financial Advisors, who need to have completed either 30 or 60 credits by this cut-off date. Should you require further information, please contact Glen Edwards ([glene@inseta.org.za](mailto:glene@inseta.org.za)) or

Shirley Steenekamp ([shirleys@inseta.org.za](mailto:shirleys@inseta.org.za)) or the Call Centre on 0861 130 013.

We have had no official notification of any extension of this date from the FSB. Should an extension be granted, the assessments will still be conducted but at a later date. •

## • FAIS Learning Provider Footprint

INSETA would like to publish a FAIS Footprint on our website and request your urgent assistance in this regard.

If you are an accredited learning provider intending to offer FAIS Fit and Proper skills programmes as directed through the INSETA ETQA, we would like to assist with making this

process as easy as possible for brokers/financial advisors/planners/assistance brokers/underwriters, etc. to find a geographically suitable accredited Learning Provider.

When you provide INSETA with the campus information and contact details (as requested above), please indicate the scope of FAIS accreditation you provide as

well as which campuses will be offering these skills programmes for FAIS Fit and Proper purposes.

Please reply by email to the INSETA Call Centre – [insetacallcentre@inseta.org.za](mailto:insetacallcentre@inseta.org.za) – by no later than 05 June 2007. •

## • **REMINDER: WSP Year 8 and ATR Year 7 Submissions**

Just a reminder that the deadline for Submissions of the **Workplace Skills Plan Y8/Annual Training Report Y7 is 30 June 2007.**

- Y7=1 Apr 2006-31 March 2007
  - Y8=1 Apr 2007-31 March 2008
- Please note that NO late submissions

will be accepted for the above documents, unless you provide INSETA with a written request on 30 June, and the reason for the late submission is material. The INSETA Council can grant an extension, for only 1 month (as per the Government Gazette No. **29583** Skills

Development Regulations 713 **Section 5.2 (a, b) & Section 5.5)** and you will be informed should it be granted.

The INSETA Call Centre is able to assist with queries so please do contact them if you need assistance: 0861 130 013. •

## • **REMINDER: Learnership, Internship and Work-Experience Based Grant Applications for 2007/8**

Please go to [www.inseta.org.za](http://www.inseta.org.za) and click on INSETA Funding, Discretionary Grants and then Learnerships for

the policies and application process for these grants.

Please note the closing date for applications is: **29 June 2007.** •

## • **Case Study—Accreditation**

**Question:** I am a registered Mentor & Assessor with ETDP Seta and INSETA. I have also been doing facilitation for the National Certificate: Financial Services on NQF level 3 (all the unit standards which is about 30 unit standards, which runs over a period of a year) inclusive of the assessments for formative and summative exams for various organisations and colleges.

I am female and managing member of a cc (no staff), I do all my facilitation on client premises or alternative venues, none of my facilitation and training takes place at the cc and the study materials are all provided by the training institution that contracts me in.

I have written a Skills Programme and Bridging Course to prepare all learners or students for the world of work and this has copyright (non-credit bearing). With relevance to accreditation, how

do I go about getting accreditation either for my cc or myself as an individual, and which is best getting the cc accredited or getting myself accredited? I would like to use my own material and also contract in other facilitators to assist me with facilitation, mentoring and assessing.

**Answer:** Education and Training Quality Assurance bodies (ETQAs), Umalusi included, are required to accredit private providers who offer programmes that would lead to qualifications that are registered on the NQF.

There is no law that prohibits you from offering non-credit bearing programmes, however, you will not be accredited to offer these.

You cannot be accredited as an individual, only as a business (cc, Pty, Ltd) even though you are a single person. When you are accredited as a cc, you can contract other assessors who will work under your

company accreditation umbrella and they can use your material.

The GENFETQA Act number 58 of 2001 mandates Umalusi to accredit private providers who are required to register under the FET Act, SA Schools Act and ABET Act. That implies that Umalusi accredits private schools, ABET centers and FET Colleges. In making provision for accreditation of providers who offer training in the workplace, the regulations under the SAQA Act states that a provider may be accredited by an SETA/ETQA whose primary focus coincides with the primary focus of the provider. Providers who offer training in the workplace are to be quality assured by SETAs. On the SAQA website, the majority of qualifications and/or unit standards listed there, that you intend to offer, will guide you on who is responsible for the quality assurance of the particular qualification and/or unit standard. •

## • *SAQA response to questions related to fundamentals*

There is a general understanding that the people who have passed Mathematics at higher or standard grade in their Senior Certificates ("matric") may be given credit for Mathematical Literacy at Levels 1, 2, 3 and 4. This is also the case with Communication in both the first and second language as a learner cannot obtain a senior certificate without 2 languages.

However, there might be special requirements in a particular sector where it is essential that the person is fully mathematically literate to operate effectively and safely in a particular role. In such a

case the ETQA might want to do a Mathematical Literacy assessment to determine that the person is competent for the job. An example here is in the mining industry, where it is essential that correct calculations be done for blasting because injuries and death could occur if they are done incorrectly. However these special requirements may not pertain to the Insurance sector.

Accounting and Bookkeeping, however, cannot be used to grant credits for Mathematical Literacy.

In Actuarial Science, learners have to

have Mathematics in their senior certificate to enroll for an Actuarial Science degree and also that there is a strong element of Mathematics at level 5 and above. In such cases, credits can be given for Mathematical Literacy at levels 1, 2, 3 and 4. This would be the case for any Bachelors degree that had Mathematics as a subject at level 5 or 6, as it is not possible to do any BSc degree without Mathematics at Level 5 i.e. first year level. •

## • *Retirement Fund Trustee Training (RFTT)*

INSETA recently conducted a series of roadshows during which the results of the research in terms of the RFTT were presented. Please use this link to view the Report ([http://www.inseta.org.za/downloads/retirement\\_fund/Retirement\\_Funds\\_Project\\_report\\_24\\_August\\_2006.pdf](http://www.inseta.org.za/downloads/retirement_fund/Retirement_Funds_Project_report_24_August_2006.pdf)), as well as the newly designed unit standards which were designed to address the upskilling of Retirement Fund Trustees.

An initial group of accredited Learning Providers are able to offer these unit standards. They are:

**Deloitte**  
Johannie Bayman 012 482 0184

**Ekurhuleni East College**  
Osborne Neluvhalani 011 736 4400

**Investment Wise**  
Joanne Miller 021 422 2701

**INTEC School of Insurance**  
Petro Taljaard.021 417 6766

**Investment Consulting & Trustee Services**  
David Weil 011 656 1160.

The unit standards are:

**123416**  
Demonstrate knowledge and understanding of the individual's basic rights and responsibilities under a retirement fund

**123417**  
Demonstrate ability to use and interpret texts that apply to the role and responsibilities of Trustees of retirement funds

**123420**  
Demonstrate knowledge and understanding of the role and responsibilities of Trustees of retirement funds

**123419**  
Demonstrate knowledge and understanding the duties of Trustees of retirement funds with regard to death benefits.

**INSETA is requesting that education and training providers, who wish to offer this Retirement Fund Trustee Training through the use of the registered unit standards, apply to INSETA for programme accreditation. Application forms are available from Neesha Naidoo on [neeshan@inseta.org.za](mailto:neeshan@inseta.org.za).** •

• **Assessor and Moderator Training**

INSETA will not be presenting Assessor and Moderator Training programmes through an appointed services provider.

In future, INSETA accredited providers (who need to have their staff trained as assessors or moderators) may approach accredited providers of the assessor and

moderator programmes, directly. They may also approach INSETA for funding support through the INSETA Bursary Fund application process. An amount of R2000 per learner will be considered, on application from the Assessor/Moderator programme provider. The learner's demographic should comply with the

National Skills Development Strategy (NSDS) requirements of 85% black learners, 54% female learners and 4% disabled learners. •

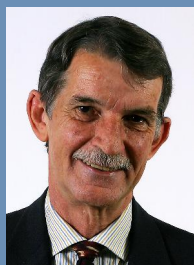
• **New staff appointments**

Nomonde Mandla joined INSETA's Learnership team as the Learnerships Consultant on 1 May 2007. With a background in quality assurance and accreditation, programme evaluation and assisting with research in teacher support, and having recently worked as a Senior Manager in ETQA at DID-TETA, we are very pleased to welcome Nomonde on board.



Shirley Steenekamp will manage the ETQA division, as well as continue to manage the Skills Development Division, for a period of 6 months during which time she will coach Tumi Peele to the Manager's position. Glen

Edwards has been seconded into the dedicated FAIS Fit and Proper Project and reports into the ETQA division. Tumi Peele is the Assistant Manager for Skills Development. •



L-R: Shirley Steenekamp, Glenn Edwards, Tumi Peele

• **And a goodbye...**

To Nathan Seotsanyana who has been with INSETA for five years and will be taking up a position at Mutual and Federal.

We wish him well and thank him for his contribution to INSETA and the sector. •