

# Monthly Review

The latest news, off the press to you

October 2007

Working together for a skilled tomorrow

- *In this issue...*

As the date for the FAIS assessment approaches, we are encouraging a number of queries regarding these. Roadshows were held in the major centres and candidates are encouraged to visit the website for the detailed information required to register

for the upcoming national assessment on 17 November 2007.

We explain the process of recording of learner achievements. We request that you, as an SDF, please check your details and those of the company you represent on our SMS. And

we invite responses to the invitation for additions to the OFO.

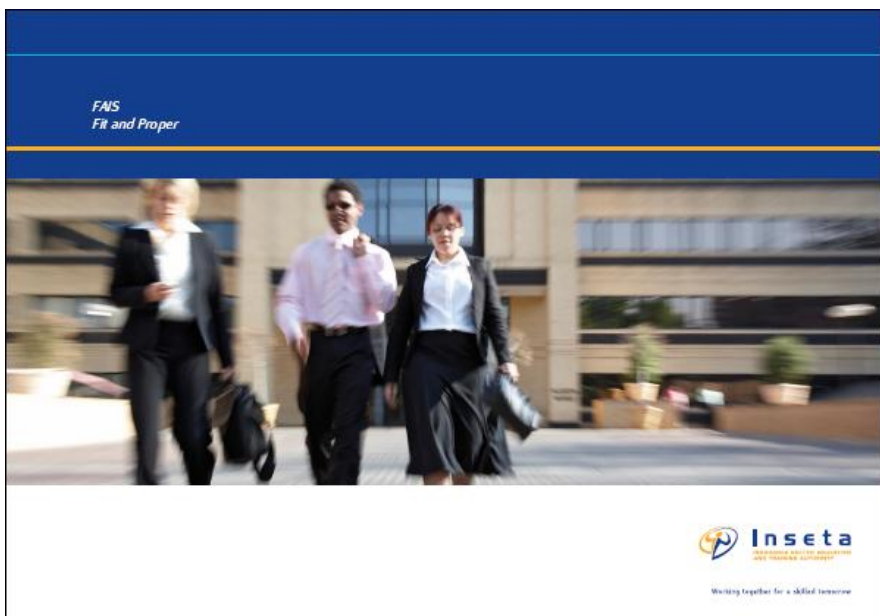
We're nearly at the end of the year, so do look forward to hearing from you in respect of the above in order to begin finishing up business for this year.

- *FAIS Project*


INSETA, in conjunction with its appointed provider, Imfundo, is conducting a national assessment for Financial Advisors in all categories to assist them in achieving the credits necessary to comply with Fit and Proper licensing requirements. These assessments are for all Financial Advisors who were employed in the Insurance Industry in 2004. On Saturday 17 November 2007, assessments will be conducted in all provinces and you have until 12 November to register. Pilot assessments and model answers are on the website for you to work through to prepare for the assessments.


For **more information on FAIS** and **to register**, please go to INSETA's website [www.inseta.org.za](http://www.inseta.org.za), FAIS Assessments or the Home Page.

We also have an electronic brochure which can be downloaded from our website.



FAIS  
Fit and Proper



  
Working together for a skilled tomorrow

## • *OFO Capacity Building*

A reminder that INSETA pays Mandatory Grants in quarterly payment runs. The next payment date for 2007/8 is:

- 30 November 2007
- 28/29 February 2008
- 30 May 2008.

All SETAs have received a request from the Department of Labour to assist with updating the OFO (Occupational Framework for Organisations).

INSETA therefore invites you to forward any proposals regarding OFO additions to

Tumi Peele by 12 November 2007 on [tumip@inseta.org.za](mailto:tumip@inseta.org.za).

When DoL announces the revised annual updated OFO, we will post this to our website.

## • *Mandatory Grant payments*

A reminder that INSETA pays Mandatory Grants in quarterly payment runs. The next payment date for 2007/8 is:

- 30 November 2007
- 28/29 February 2008
- 30 May 2008.

## • *Recording of Learner Achievements*

The process for recording learning achievements is as follows:

- After learning, assessment and moderation have been conducted by the provider, the provider requests INSETA to verify the learning
- INSETA verifies and, if approves, authorises the provider to start upload-

ing learner achievements on the SMS (INSETA's IT system)

- Once achievements are uploaded, INSETA has to check the uploads as the system will not allow us to approve if not correctly uploaded (eg. rules of combination not followed, assessor not registered etc.)
- Once approved, our IT division,

Deloitte, does a mass upload periodically to the national database (NLRD). NB: once transferred to the NLRD the learner will show as "achieved" and the information will not be shown anymore. Learners who wish to query the status of their learning are required to check with the provider which stage of the process they're at.

## • *Your contact details on INSETA's Seta Management System (SMS)*

Direct mailshots and our newsletters are key communication tools in disseminating information to you, our stakeholders. We appeal to you to regularly update your company profile and the contact

names on our SMS. Please add in details such as the CEO, HR manager, etc. as well as current SDF details. It assists us in communicating with our stakeholders more effectively and timeously.

As an SDF, if you don't have a username and password, please feel free to call our Call Centre on 0861 130 013 who will assist you in registering as an SDF and obtaining the username and password.

## • *Regional Forums*

For those of you who attended the Regional Forums held at the beginning of October, here is some of the feedback. The sessions were clearly well received and the general consensus was 'very informative on important issues'.

The presentations that were made can be found on our website under News and Communications, Latest Presentations.

### **What benefit have you derived from attending this workshop?**

Lots of insight, good contacts, important information-D Scholtz, Full Circle Informative session-D Govender, ICG INSETA process with regard to learnerships-L Bam, Metropolitan Mentorship must be encouraged-L Scholtz

National FAIS Fit & Proper assessments-H Adams, Metropolitan  
More clarity on SMS system and future assessments-F Booys  
Broader view of activities-N Davis  
Interaction with stakeholders/ Networking  
In-depth understanding of INSETA focus for 07/08-A Madjaw, Aquila  
Learnership grant applications  
Future developments  
First hand information-B Pritchard  
Assessment and moderation qualifications-C Lategan  
Has helped me put the qualifications needed into perspective-D Cook  
Gaining an understanding of INSETA's requirements-L van Heerden, Metropolitan  
Getting to know the Providers-L, Metropolitan

Learned more about process and application-J Claasen  
Great developments implemented-U Buttress  
Bursaries availability and access-M Lekey  
Voucher system clarity-R Venter  
Clarity on a few issues, specifically FAIS-E Jensen  
What SDFs must do with the Seta Management System-S Achilles  
Opportunity to ask questions and engage-M du Toit  
Clear up uncertainties-V February  
Very beneficial session, especially about Learnerships and ETQA  
It is a pleasure dealing with INSETA – thanks for regular feedback and updates  
Sharing of valuable information. Keep up the good work—C van der Merwe, Metropolitan.

## • *Learners on the New Venture Creation Project*

The **New Venture Creation (NVC) Project** has seen the 20 learners completing their theoretical study phase and moving into the 12 month work-place experience phase of the project.

We are delighted and encouraged with a number of these unsolicited letters from learners on the NVC Learnership. Here are some extracts from these letters:

Says **Sakhile Molokeng**: "Ever since I've been placed at iChoices, I'm always looking forward to a brighter day. Marketing yourself and creativity is the key. I came up with an idea whereby the sales department can capture client's details, save them into the database and print a

report each week. The purpose of the system is to make things easier for sales learners, instead of typing weekly reports".

**Dudzile P Ntshingile** reports on her workplace experience: "As young people we do not know what lies ahead for us. This skills development programme is a great opportunity for us as youth trying to build a better future for us. Working at BBSN for me is an important experience because everyday I meet with brokers who are already successful in the Insurance industry and they always give tips and advice on their success on how they survived in this dominantly white industry and that you must always

work harder to have more clients in order to survive at the end of the month".

"I'm personally looking forward to completing the programme and to a brighter future that lies ahead of me. I am well aware of the obstacles that may arise, but that is not to be considered as a factor because we know what lies before us is a great stream of opportunities", wrote **Mpono Makwela**.

- ***New staff appointments***

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Mike Abel, CEO of INSETA, is delighted to announce the appointment of **Shirley Steenekamp** as the **Senior Manager: Learnerships and Quality Assurance**. “The experience that Shirley brings to the Insurance SETA is enormous and is a major contribution to the service we deliver to our sector”, says Mike Abel.



**Tumi Peele** moves up to the position of **Learnerships Manager** and we are also very pleased with this as Learnerships is one of the success stories in for INSETA.

