

INSETA Weekly Review

The latest news, off the press, to you

Friday, 7th October 2005



In this week's issue, we cover:

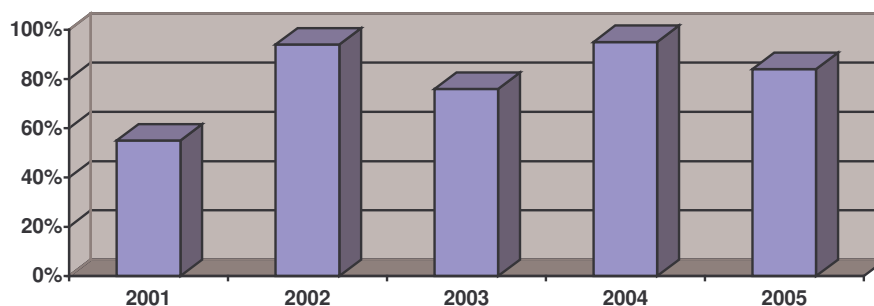
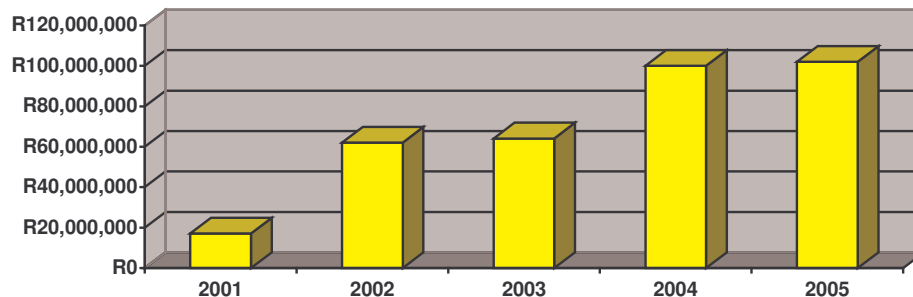
INSETA's part in delivery of education and training support, the latest on unit standards & qualifications, good news from Learnerships division, SAQA's new online portal, Equity Statistics, INSETA's SMS, Workplace Skills Plans and much more!

The Editor

INSETA playing its part in delivery of education and training support to stakeholders

INSETA is certainly playing its part in meeting its mandate in delivering education and training support to its stakeholders and in that way is also contributing towards the Financial Sector Charter targets. The graph below highlights over a five-year period the amounts INSETA has paid out in terms of grants and projects and the spent percentages:

Amounts spent on Projects and Grants



Percentage spend on Projects and Grants

The latest on Unit Standards & Qualifications

Unit standards are currently being written for the National Certificate in Wealth Management (Level 6), retirement funds and investments and the Certificate in Short-Term Insurance (Level 5), which focuses on risk management and the role of insurance.

Unit standards under review include:

- Risk Management (Level 4)
- Trustee unit standards
- Fundamental unit standards at Level 5 and Level 6

Unit standards/qualifications that will be registered shortly include:

- FET C: Long-Term Risk Assessment
- National Certificate: Long-Term Risk Assessment: Level 5
- National Diploma: Long-Term Risk Assessment: Level 5
- FET: Retail Insurance

Appointment of Service Provider to assist stakeholders to put together appropriate training courses

Grey Training has been appointed by INSETA to assist stakeholders in the sector to put together appropriate training courses by analysing current qualifications and unit standards with a view to repackaging them into manageable unit standards.



Aubrey Maseko & Pam Erasmus

Feedback from the Learnerships Division

Aubrey Maseko, Learnerships Manager, has just returned from regional workshops hosted in Durban, Johannesburg, Cape Town and Port Elizabeth where amongst, other issues, the Learnerships Funding Policy was discussed. Suggestions and frustrations were expressed by stakeholders which will be taken into consideration and policies fine-tuned to be approved by INSETA's Council when it next meets in November. Visits to stakeholders in the Free State, Richards Bay and East London will be arranged shortly.

Good news regarding Applications for Learnership Funding

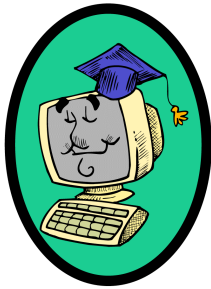
Good news from the Learnerships division is that all the applications received for Learnerships funding have already been assessed and INSETA is awaiting the closing date of 31st October, when it will commence with the verification process. It is anticipated that all administrative processes will be completed before the originally agreed date of the 15th December!

Appointment of Edith Mtongwa from PricewaterhouseCoopers to assist INSETA

Edith Mtongwa from PricewaterhouseCoopers has been appointed on a contract basis to assist INSETA in establishing a senior staff position that: -

- Carries administrative responsibilities for the INSETA Special Sector Sub-Committees that are being set up
- Fulfils the role of Financial Sector Charter Specialist
- Offers support to stakeholders who already use the Investors in People Standard

High level activities in fields of study as a result of Financial Sector Charter and FAIS legislation



There is a high-level of activity towards studying in the sector as a result of two major imperatives, namely the Financial Sector Charter and FAIS legislation. The net result being that the National Qualifications Framework has taken off in the sector in a big way! Many learning providers are wishing to be accredited to provide training that will assist with the implementation of FSC and FAIS.

INSETA's ETQA division currently has twelve applications that are being processed from learning providers, wishing to obtain their accreditation.

SAQA develops portal to provide on-line comprehensive array of NQF related information & services

The South African Qualifications Authority has developed a portal called the NQF Gateway (www.nqf.org.za), which provides an online entry point to a comprehensive array of NQF-related information and services. It offers clearly categorised information regarding the NQF, its policies, programmes, events, publications and resources. It also has detailed information about the **NQF Support Link Programme** that SAQA launched recently. For more information about NQF Gateway, contact Ms. Ntsiki Gumbe, Manager: NQF Information Services, SAQA on 012 431-5009 or email ntsiki@saqa.org.za

The INSETA Skills Management System (SMS)

INSETA extracts its database from the INSETA SMS to obtain contact details for communicating with levy-paying/ registered stakeholders.

Primary Skills Development Facilitators (SDFs) are requested to keep their contact details updated as well as updating their organization contacts (on the **Org Contacts** tab) so that relevant contact persons may receive important information such as invitations to workshops, deadline information and general updates, and of course – our newsletter!

The organisation's Training Committee details should also be updated on the **Training Committee** tab.

Please note that Secondary SDFs only have viewer access and will therefore have to communicate changes to their Primary SDF.

Did you know that you are able to check your company's levy payments and mandatory grant reimbursements online?

Did you know that you are able to check your company's levy payments and mandatory grant reimbursements online? Simply click on the **Grants & Levies** tab on the SMS and select the levy year for which you require information. Please ensure that our records match your company records on levies paid and mandatory grants reimbursed to your Finance department. If you require any assistance on the SMS call our Call Centre on 086 113 0013.

INSETA as custodian of quality assurance of education & training will provide regular data about learning providers

INSETA receives many requests from its stakeholders, for guidance regarding which providers are available, where they are located, what they offer, and whether they are an accredited provider.

Over and above this, the Department of Labour requires information about the learning providers, and numbers of learners undergoing training and education in learning programmes linked to the sector. This information must be broken down further into gender, race and disabled statistics.

INSETA, as custodian of quality assurance of quality education and training, will be providing a regular set of data on providers about their ownership, their numbers of learners, their programmes, as well as their pass rates, and learner placement rates. This will build better understanding about the scope of offerings the various providers have, and assist the stakeholders to find a quality provider to meet their needs, in their geographic locations. The first 10 providers have provided their information, which is currently being evaluated and put into a template.

The Department of Labour quarterly report statistics will be available soon, once the Department has signed them off, and we will be able to offer the sector information about how many learners are in learning programmes across the sector. We have always only reported on the numbers of learners in learnerships, but this has obviously not given a clear picture of all the training actually being undertaken in the sector. Our reporting will be a far better reflection of skills development activities across the sector.

Latest on our Sector Skills Plan

The draft update of the Sector Skills Plan 2005/2006, has been on website for comment, for a while already. Positive comments have been received about the thoroughness, and format of the report, as well as about the interesting information contained in this research. The date for comment closes today, after which all the comments received will be evaluated for input into the Plan.

The process going forward includes the final approval of the Plan by Council, the signing off of Sector Skills Plan by the relevant Ministers of other State Departments, such as the

Department of Finance, and organs of State, such as the Financial Services Board. The Plan will then be submitted to the Department of Labour by 31 October 2005.

The nature of the Sector Skills Plan is such that it is based on direct input from the sector, by the sector, and the research is for the sector. The Plan is a strategic document that should frame the companies' developmental, succession and training plans. To make sure that the Sector Skills Plan reaches all the target audiences within our sector, an Executive Summary will be produced, and launched together with the full Plan to the sector, in special functions to be held from mid November 2005.

The intention is for the sector, at all levels to embrace this research in a meaningful and interactive way, and to ensure that we carry out the mandate for training and development that we set ourselves through our considered responses in the research interviews and questionnaires that frame this current Sector Skills Plan.

Collecting Equity Statistics from signatories to the Financial Sector Charter – a mixed review

INSETA was requested to act as a "post office" to collect information from the signatories of the Financial Sector Charter, for analysis by the FSC HR Committee.

We are aware that many companies felt exceptionally time-constrained, and could not respond to the request. We received some responses, and thank you to those companies that could respond in the short period of time they were given. There were companies that were not signatories to the Charter and did not need to respond, but indicated a willingness to provide information, "to move our sector forward". Then there were those who were somewhat irritated by the overload of information they were expected to provide. We know that at the end of the day, this sector has always been a dynamic sector, and people development has been central to its success, as one of the largest contributors to the GDP of South Africa.

In this spirit, the information received from you, will provide some indicator of how we are faring towards reaching the equity targets we committed to, and which will drive better business growth in future.

Talking Workplace Skills Plans: INSETA receives an excellent response from stakeholders

The Skills Development division has received well over 200 Workplace Skills Plans (WSP's) from our stakeholder companies. We really appreciate this response, when we consider that you only submitted your Annual Training Reports (ATR's) by end of May 2005.

The WSP Year 6 also had a new template in operation for the first time. The information from this template will provide an excellent view of the "state" of the sector, especially in terms of the level of educational qualifications per job category, gender and race profile of individual learners.

The Skills Development division will also be providing reports based on the actual statistics, from your WSP's in terms of how you are faring with your FSC targets, based on the size of

your company, and which interventions you should be engaging in, to meet scarce and critical skills targets for your company.

Based on receipt of your WSP, you can expect 50% of the levy you pay, to be paid out to you in quarterly payments, from November 2005, onwards. We look forward to disbursing large sums of money back into the training budgets of our companies, as together we can co-sponsor the training needs of a sector involved in FAIS Fit and Proper, and the FSC targets.

Please note that the Y7 WSP as well as the ATR for Y6 will need to be submitted before or on 30 June 2006, for companies to receive their 50% mandatory grant. This is advance "warning" and we will keep all stakeholders in a communication loop over the next months. The ATR template will be work shopped before finalisation, and then it will be all systems go.

Thank you once again for a great response.

The role of the Regional Advisor and what you can expect from them

INSETA has recently confirmed the appointment of the Regional Advisor (RAs), introduced to you in last week's *INSETA Weekly Review*. The RAs are an integral part of INSETA's operational structure, with the added advantage that they are based in the provinces and regions where the sector is based.

You can expect the RA to advise and guide a range of clients, both internal sector stakeholders, namely our levy-paying companies, as well as numerous other employers, employees, brokers, SMMEs, Provincial Departments of Education, local Government agencies, and providers, who all have a direct interest in the activities of INSETA, and/or who stand to be service providers to our stakeholders.

The RAs provide advice and guidance to employers on:

- completing workplace skills plans and annual training reports
- skills development matters
- assessment, portfolio of evidence requirements and recognition of prior learning
- pre-accreditation visits as requested by INSQA
- promoting and implementing learnerships
- projects and possible participation
- INSETA's SMME strategy
- Regional Forums

The RAs are the first "port of call" as it were for you in the regions. They are managed by the Skills Development Division, and have very close interaction with the INSETA through regular information and update sessions, with all the INSETA divisions.

Their monthly reports are carefully read, to find issues that are sector-wide challenges, and need high level interventions, or issues which are more local or regional, and need face-to-face personal INSETA input and assistance.

We trust that they will grow the network of participating people, at all our forums, and workshops. Each one of the RAs is a generalist, who can address issues across all SETA functions.



What causes delays in the accreditation application process?

Learning Providers are encouraged to contact the ETQA division prior to completing their application to be accredited as a learning provider as this will avoid unnecessary delays in the process. Often applications are submitted that are incomplete, which results in the application having to be returned.

What about Portfolios of Evidence?

Stakeholders submitting learner portfolios for moderation need to ensure that a complete set of evidence is submitted in line with the ETQA Moderation Criteria & Guidelines. Stakeholders who are unsure on what to submit can contact Neesha, Nathan or Tamara in the ETQA division.

Our learners have completed their learnerships and we would like to host a graduation ceremony and hand out learner certificates at the ceremony, is this possible?

Absolutely, providing that all information has been loaded on to the National Learner Record Database (NLRD) timeously. Official INSETA Certificates cannot be issued until all the administrative procedures have been followed.



Before you know it, the silly season will soon be upon us!

Please be advised that INSETA's offices will be closed from 1:00 p.m. on Friday 23 December 2005 and will re-open for business on Tuesday 3rd January 2006. Here's to happy holidays!

We Get Letters..

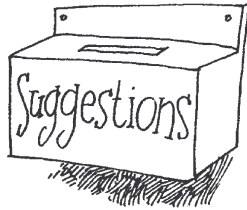


On INSETA's Weekly Review:

"Once again a BIG thanks for the wonderful initiative I think this would go a long way in support of good stakeholder relations and two-way communication. Your efforts are much appreciated."

On Regional Workshops:

I want to congratulate you for a well-prepared input session at today's Regional Forum Workshop in the Western Cape. There was a true sense that INSETA is really interested in engaging Stakeholders."



We welcome your suggestions, feedback or comments, please contact:

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Quote for the week:

"Whenever you see a successful business, someone once made a courageous decision" – Peter Drucker