



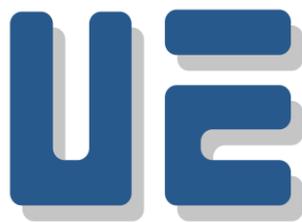
inseta

INSURANCE SECTOR EDUCATION
AND TRAINING AUTHORITY

INSETA TRACER STUDY

Final Learnerships Findings Report

January 2020



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Acronyms

CoS	Centres of Specialisation
DHET	Department of Higher Education
EL	Employed Learnerships
FETC	Further Education and Training Certificate
INSETA	Insurance Sector Education and Training Authority
NC	National Certificate
NCV	National Certificate Vocational
NOCC	National Occupational Curriculum Content
NQF	National Qualifications Framework
NSDS III	National Skills Development Strategy
NTC	National Technical Certificate
POPI Act	Protection of Personal Information Act
QCTO	Quality Council for Trades and Occupations
SA	South Africa
SETA	Sector Education and Training Authority
SDF	Skills Development Facilitator
TVET	Technical and Vocational Education and Training
UIF	Unemployment Insurance Fund
UL	Unemployed Learnership
WBL	Workplace-based learning
WIL	Work Integrated Learning

Glossary

Beneficiary:	Refers to an individual who completed a work-based learning programme (in this case, learnership programme).
Bursaries for workers:	Bursaries are financial need-based awards and are available to learners who applied to Public Higher Education Institutions (universities and TVET colleges) only. Bursary funding covers tuition costs only and is capped at R30 000 for degrees; R10 000 for diplomas; and R6 000 for TVET College Certificate courses.
Employed learnership (EL):	Employed learnerships are available to employed individuals. The EL beneficiary must be employed by a levy-paying or non-levy-paying employer in the Insurance or related services sector. The EL beneficiary does not receive a stipend, however, R20 000 is allocated to tuition costs.
Employer or host organisation:	The organisation where the beneficiary was contractually employed or 'hosted' to undertake work-based learning (WBL) in order to complete the learnership programme.
Employment status:	A catchall phrase used in the report to capture the destinations of learners who completed the learnership programme of 2016/17 and refers to any type of activity as categorised in the survey questionnaire about what they were doing after the learnership programme in 2018, particularly.
Financial situation:	The term as used in the report refers to the respondents' perceptions of their financial outcomes following participation in the learnership programme. The responses were captured through open-ended responses, which differs from the more objective responses about their gross monthly incomes and income increases captured through closed questions.
Internship:	Internships are open to unemployed persons only. The programme promotes work experience for unemployed youth by providing them the opportunity to apply their theoretical training in the workplace. The programme runs for 3, 6 or 12 consecutive months through an employment contract between the employer or host organisation and the beneficiary. Beneficiaries with a matric plus qualification receive a stipend of R4 500; those with a degree receive R6 500.
Learnership programme:	Refers to a structured work-based learning programme that includes theoretical and workplace learning that leads to a registered qualification. The programme typically runs for a minimum of 12 consecutive months and is offered to both unemployed persons and employed persons. See Employed learnership (EL) and Unemployed learnership (UL) .
Participant:	Refers to an individual who participated in a work-based learning programme (in this case, learnership programme). See also Beneficiary .
Population size:	The total number of the learning programme participants.
Respondent:	Refers to a beneficiary who completed the survey.
Sampling frame:	The total number of learning programme participants with contactable details.
Sample size:	The predetermined total number of participants drawn from the population size in order to conduct the survey questionnaire.
Total population:	All those who graduated from the 2016/17 learnership programme.

Training provider:

Refers to an accredited training centre or organisation in partnership with INSETA to provide sector-related training to candidates of a learning programme. The training provider takes care of all the administration related to the beneficiary's qualification.

Unemployed learnership (UL):

Unemployed learnerships are available to unemployed youth. The learner enters into a fixed-term employment contract to achieve workplace learning while studying towards an NQF registered qualification. The UL beneficiary receives a stipend of up to R4 000 and tuition costs are covered up to R20 000.

Executive Summary

The executive summary details the key results from the tracking and tracing survey on beneficiaries of the **2016/17 intervention period** for the **Learnership learning programme** in the Insurance sector.

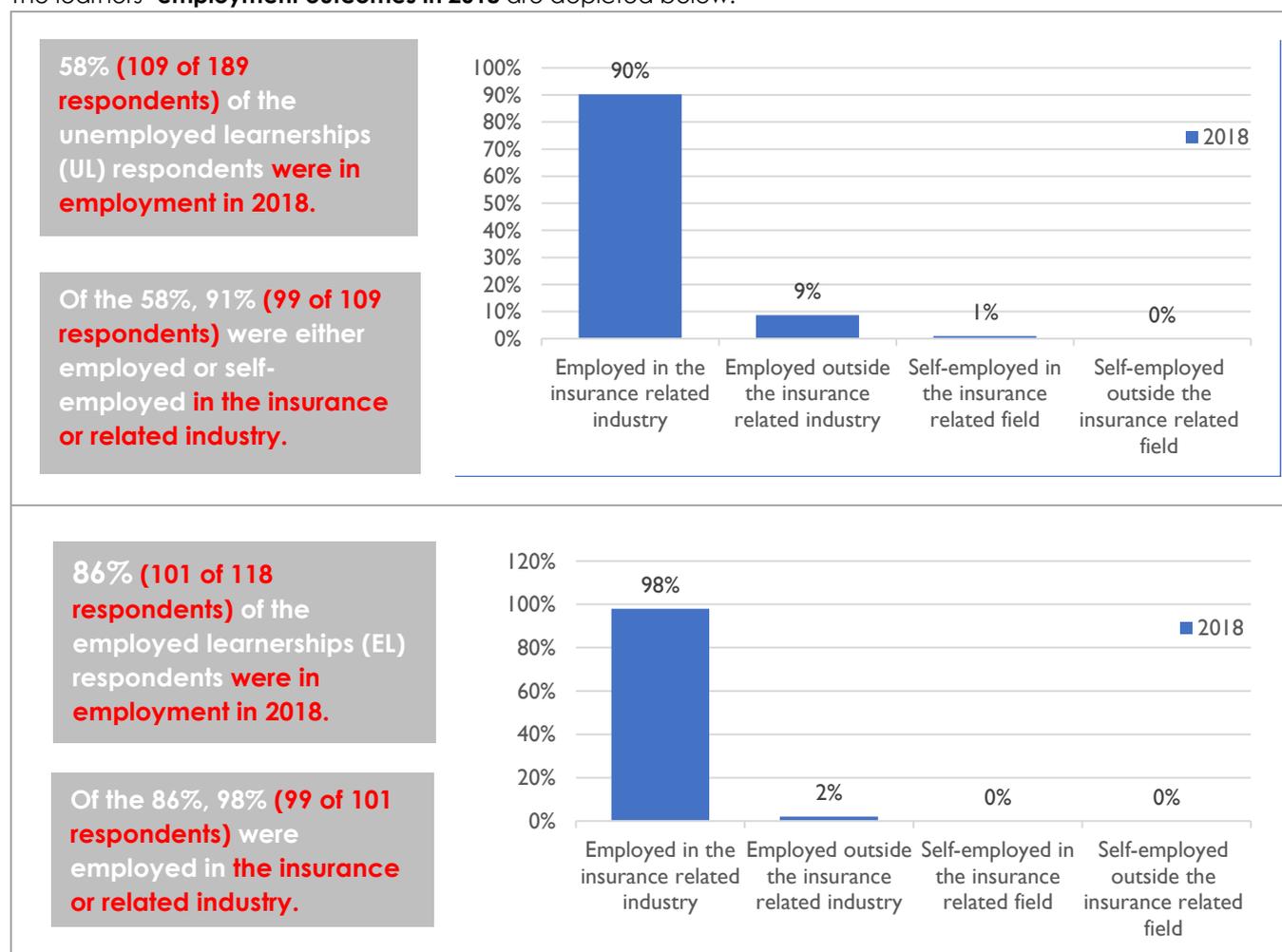
Below are the key sampling statistics for the learnership tracking and tracing that was conducted.

- **Total sample: 283**
 - **Unemployed learnerships (UL) split: 173**
 - **Employed learnerships (EL) split: 109**
- A total of **475 respondents were contacted**
- **Total achieved/completed survey: 327 (116% response rate):**
 - **Unemployed learnerships (UL) split: 189 (109% response rate)**
 - **Employed learnerships (EL) split: 138 (126% response rate)**
- Usable contacts: 2 521
- Number of calls made: 1 146
- Average number of calls to get a complete survey: ±4

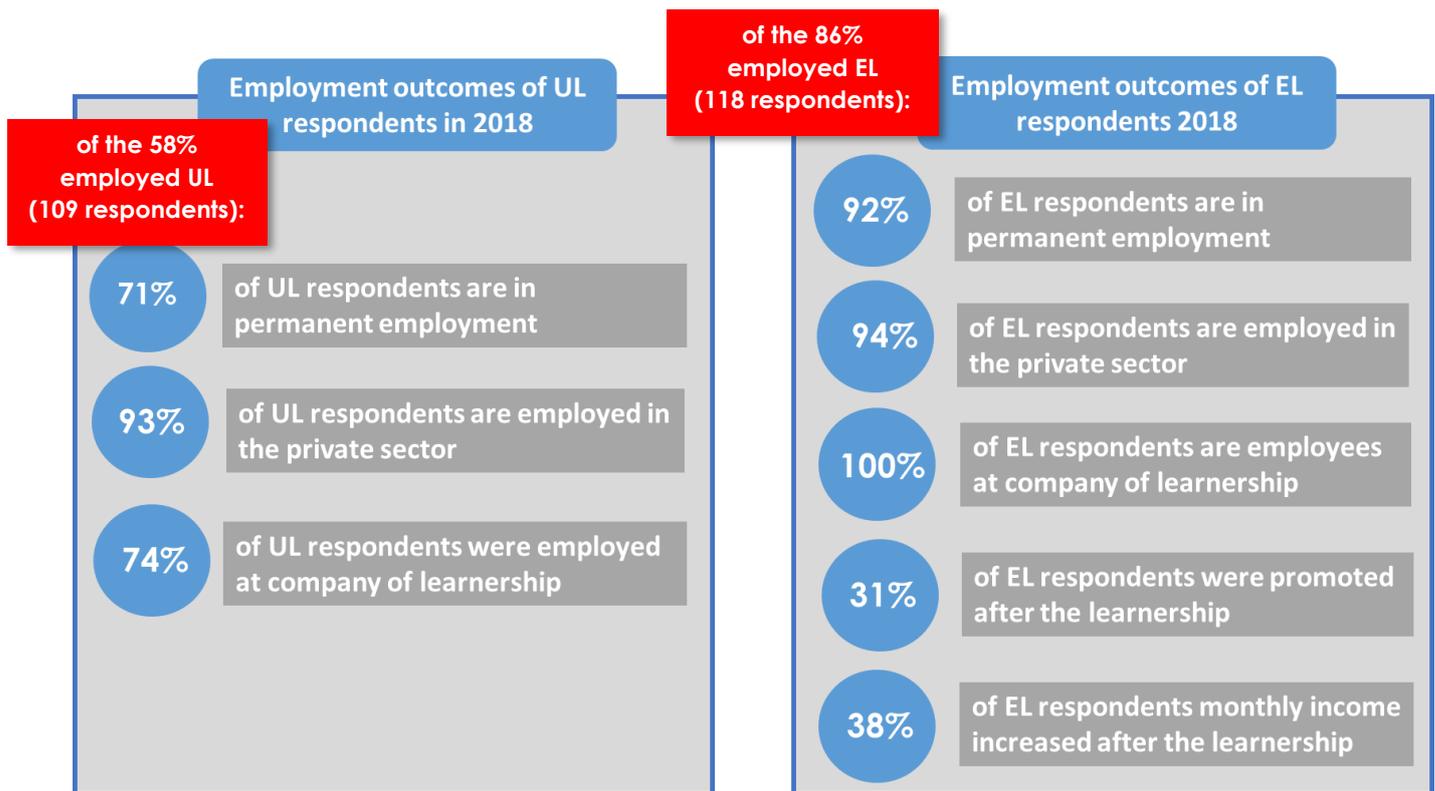
Based on the above statistics, the basis for the research for the learnership programme was without limitations.

Employment outcome of learnerships respondents

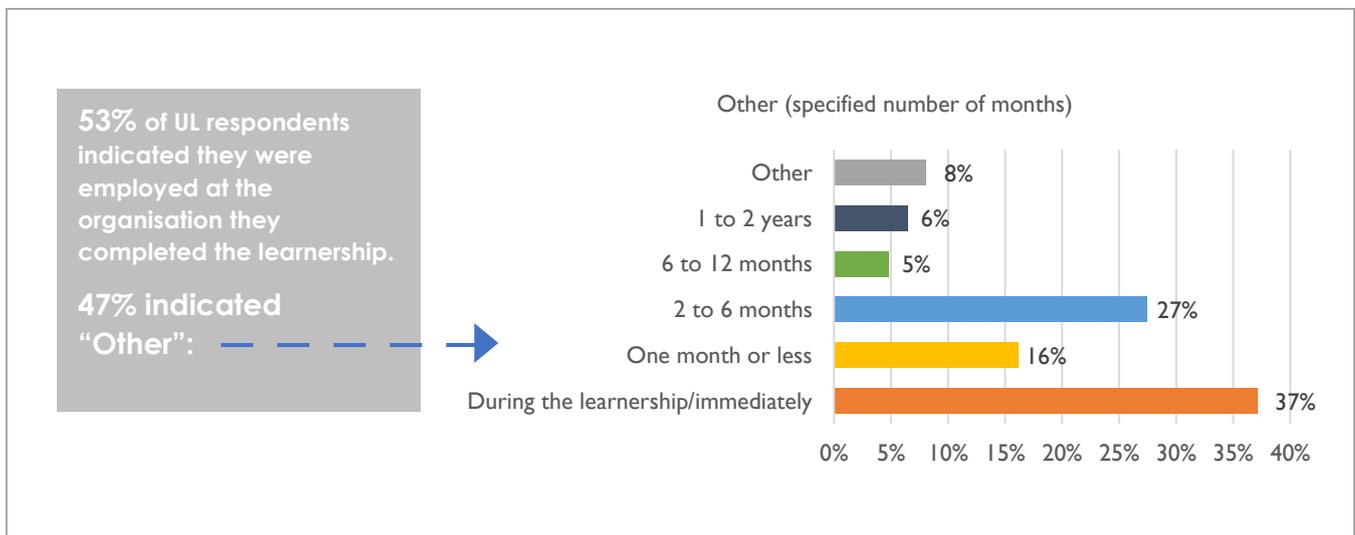
The learners' **employment outcomes in 2018** are depicted below:



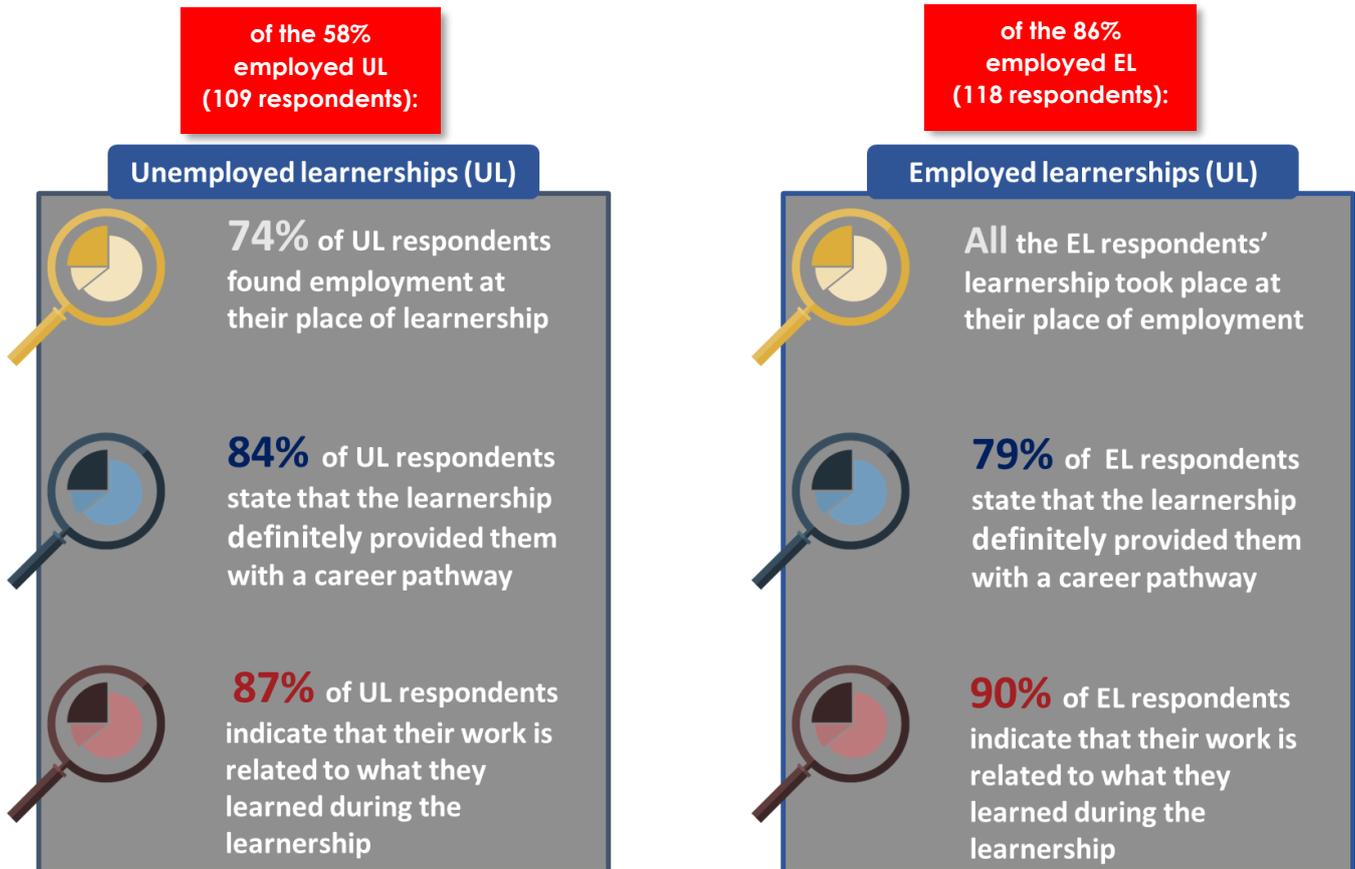
Of those respondents in employment in 2018, the following key observations are made:



Of the **58% employed UL respondents (109 respondents)**, the following with regards to the time it took to find employment is revealed:



For those respondents that were employed post-learnership, the following perceptions of the programme's impact on their career development was captured:



Key findings

Based on the results of the learnership tracer study conducted, the following was identified about the programme's impact on beneficiaries:

- Overall, respondents experience **better employment outcomes after the programme**.
- The programme **positively impacts the financial situation** of beneficiaries.
- **Subjectively, the respondents were less positive about the impact of the programme** on their skills development in securing employment and realising career expectations.

Recommendations

The recommendations provided are applicable to all three learning programmes and are discussed in detail under the relevant section of each report. They are grouped under two major themes and include the following observations:

1. **Ongoing monitoring and evaluation**
 - The ongoing **capturing and recordkeeping of beneficiary details** to support future studies
 - **Following-up with learners** during and after the programme, including the provisions of aftercare services and tracing of learners of periods of time to track impact of the programme
2. **INSETA oversight and support**
 - Use key findings from tracer studies to **review and assess** programme coordination efforts and to **identify areas of improvement** in various respects

1. Background and Introduction

This report details the findings from the tracking and tracing survey on beneficiaries of the 2016/17 Learnership learning programme in the Insurance sector.

1.1 Purpose and outcomes of the study

The National Skills Development Strategy (NSDS III) is aimed at improving the effectiveness and efficiency of the skills development system by implementing eight strategic goals, designed to address the eight key identified challenges faced by South Africa. One of these goals is to encourage better use of workplace-based skills development, aimed at developing a capable workforce.

To determine whether this goal is being achieved, it is necessary for the SETAs to build an empirical basis for implementing, monitoring and evaluating programs to address the goals of the NSDS III. It was indicated on 1 April 2018 that SETAs must undertake impact research inclusive of tracer studies and regularly produce their findings. The current tracer study seeks to respond to this requirement.

The tracer study investigates the destinations of learners who completed INSETA-funded Workplace Based Learning (WBL) programmes, including internships, bursaries and learnerships. The study serves to explore the key features, trends, challenges and outcomes of skills interventions in the respective sub-sectors of the Insurance SETA, as follows:

- Short-term insurance,
- Life insurance,
- Insurance and pension funding,
- Risk management,
- Unit trusts,
- Administration of health care benefits,
- Funeral insurance,
- Reinsurance,
- Pension funding, and
- Activities that are auxiliary to financial intermediation (INSETA 2018).

The outcome of the tracer study is to determine whether a type of programme is achieving its mission and to demonstrate its outcomes. In line with this, the findings from the tracer study will provide INSETA with key information regarding learners who participated and completed WBL programmes in the last 12-24 months, including:

- Employment status (employed, self-employed and unemployed);
- Employment rates;
- Match between qualifications attained and occupations;
- Nature of employment, in terms of employment sector or types of employment (e.g. formal or informal); tenure (part-time or full-time, contract or permanent); salary level; benefits (UIF, pension, medical aid, allowances); and
- Further study.

Fundamentally, the research study assists in further developing a sustainable skills development strategy for the Insurance SETA. **The study reveals** information for the following concerns:

- Whether the implemented WBL programmes improved the skills and knowledge for employed beneficiaries;
- Whether the WBL programmes facilitated access to and entry into careers within the Insurance sector for those who were unemployed; and
- Whether the WBL programmes facilitated access to and entry into self-employment.

The current report provides the complete findings for the Learnership Programme. The report is the first of three stand-alone reports and is provided for each of the learning programmes. The results of the Bursaries and Internship Programmes have been compiled into separate reports.

1.2 INSETA Workplace-based Learning Programmes

Workplace-based learning programmes in South Africa comprise internships, learnerships, and apprenticeships. In line with the NSDS III, these programmes form part of a skills development system that aims to address skills development challenges and improve workplace training in the country.

The Department of Higher Education and Training (DHET) places importance on occupational qualifications obtained through skills development arrangements incorporating workplace-based learning practices in education institutions and at workplaces. The purpose of workplace-based learning, according to DHET, is for individuals to obtain trade-based occupational qualifications as illustrated in the diagram below.

Diagram 1 DHET's Purpose of WBL



Source: DHET, 2015

In line with the purpose of WBL, INSETA has formulated learning programmes that fill the needs of skills development requirements in the country and in the Insurance sector specifically. The learnership programme is described by INSETA as structured work-based learning which includes both theoretical learning and practical experience in the workplace. The theoretical component of the learnership programme, given through an accredited training provider, together with the practical experience obtained through an employer, leads to a registered qualification.



Through its mandate to promote skills development in the Insurance and related services sector, INSETA funds three learning programmes for the sector, including learnerships (employed and unemployed), internships and bursaries for workers. The programmes and their key criteria are briefly described as follows:

 <p>Learnerships</p>	 <p>Internships</p>	 <p>Bursaries for workers</p>
<p>Learnerships promote access to education and training and work experience in one intervention. Employers are expected to provide space and equipment to enable learners to apply their theoretical knowledge in the workplace.</p> <p>EMPLOYED LEARNERSHIPS CRITERIA:</p> <ul style="list-style-type: none"> Learners must be employed by a levy-paying or non-levy paying employer in the Insurance or related services sector The programme is open to persons permanently employed and permanent SA citizens Learners are permitted to one INSETA funded programme within a 12-month period Employed learners are not privy to a stipend, but tuition is covered at R20 000 <p>UNEMPLOYED LEARNERSHIPS CRITERIA:</p> <ul style="list-style-type: none"> Learners must be unemployed and SA citizens Learners must be between 18-35 years of age Learners must only be on one INSETA funded programme within a 12-month period Stipends are allocated up to R4 000 and tuition R20 000 	<p>Internships are offered by employers to students and graduates for prerequisite time to expose them to the working environment in a specific industry with work related to their field of study. The time period for an internship can range from three or six or 12 months.</p> <p>INTERNSHIPS CRITERIA:</p> <ul style="list-style-type: none"> Learners must be SA citizens The programme is open to unemployed persons between 18-35 years of age Learners are permitted to one INSETA funded programme within a 12-month period Learners are subject to terms and conditions of the contract entered into with an employer Learners are subject to the performance requirements of the internship Learners with a matric or higher qualification are privy to a stipend of R4 5000; persons with a degree receive a stipend of R6 500 	<p>A bursary is a monetary award granted to eligible individuals on the basis of priority skills. Bursaries are allocated to learners who applied to Public Higher Education Institutions (universities and TVET colleges) only. Although INSETA funds bursaries for the employed, funding covers tuition costs only. Bursary funding is open to both unemployed and employed youth.</p> <p>BURSARIES FOR WORKERS CRITERIA:</p> <ul style="list-style-type: none"> The programme is open to persons permanently employed by an INSETA registered employer and permanent SA citizens Learners must be between 18-35 years of age Funding is applicable for one year only, students must re-apply for every year of study Qualifications must be related to Insurance sector as per INSETA Bursary Funding advertisements Learners are permitted to one INSETA funded programme within a 12-month period Bursary funding is capped at R30 000 for degrees; R10 000 for diplomas; and R6 000 for TVET College Certificate courses

Source: INSETA, 2018.

This report presents the survey and research findings of the Learnerships WBL programme for the 2016/17 period.

2. Methodology

The methodology used to conduct the survey follows the scope of the assignment as described in the Inception report. This section briefly details the surveying and data analysis activities undertaken for purposes of the INSETA-funded learnership programme for the 2016/17 intervention period.

The methodology followed allows for the successful tracking of beneficiaries from the three WBL learning programmes between 2014 and 2017/18. The beneficiaries tracked were surveyed to determine their destinations following participation in any of the learning programmes. As determined, the surveying process took between three to four months to complete. The responses from the survey were collected, interrogated and analysed for compilation into an **integrated impacted assessment** report. **Three stand-alone reports are compiled for each of the learning programmes. The learnership findings report is the first of three.**

2.1 Target population and sampling approach

Overall, the sampling frame for the project employed the **probability sampling method**, which allows for some degree of confidence to make inferences of the larger population. The total number of all potential participants, or **population size, was approximately 10 000**. A total **sample size of approximately 1 297 participants** across all programmes was drawn from the population size using a 95% confidence interval with a 5% margin of error.



The sample for each of the learning programmes was derived from the target population by random selection. In probability sampling, this method ensures that the characteristics of the sample size or smaller group will reflect that of the larger population. The diagram below details the sampling statistics for the learnerships WBL programme as undertaken in the research project.



The analysed data:

- Inform the research questions, including the destination of students who completed WBL programmes;
- Identify the factors that influence employment and unemployment among WBL graduates;
- Evaluate how well skills training programmes are matched with the occupations of employed learners; and
- Give insight into graduate perceptions of the WBL programme they attended. This information is used to make assumptions on the collected data, and it helps to explain the findings apparent from the organised information.

2.4 Interpretation of results

As a precursor to reading the results and findings of this report, an observation around terminology and interpretation must be made.

The report mostly presents **objective data** and information. However, the survey questionnaire consisted of about 25 open-ended questions, which made inquiries into respondents' perceptions of the programme, the programme's impact on their careers and financial situations, as well as their overall experience and assessments. These responses are used throughout the report to relay the **subjective experience** of the respondents and enriches the information presented in the learnership findings report.

Considering this, it must be noted that the subjective information (particularly, Section 3.4.4 and 3.4.5) may appear in contest to the more objective findings presented in Section 3.3, 3.4.1, 3.4.2 and 3.4.3, but only because the former records what the respondents perceive and the latter captured more direct and impartial responses. This is clearly seen where the respondents indicate less financial happiness (as seen in Section 3.4.4) compared to the monthly income ranges indicated in Section 3.4.2, where it shows that the respondents are earning salaries which puts them among the top 10% of earners in the country. However, given the socio-economic backgrounds of South African youth, earning a salary upward of R7 000 when they are obliged to family responsibility and possible tuition debt does not put them in a position of financial fulfilment. In fact, some of the respondents indicated that their responsibilities increased as their monthly incomes increased, which resulted in them experiencing only 'somewhat' of a change in their financial situations after the programme or upon employment.

Another distinction must be made concerning the split data between employed learnerships (EL) and unemployed learnerships (UL) in some sections. The data speaks to the same findings but is split to be representative of the two learnership programme types, for better clarity and accuracy of interpretation.

3. INSETA Learnership Programme

This section of the report provides an overview of the learnership programmes offered by INSETA and details a summarised description of the programme as funded by INSETA and the expectations it holds for all parties involved. The section then presents the results from the learnership survey conducted in the month of July 2019.

3.1 INSETA Supported Learnership Programmes

According to records supplied by INSETA, the following learnership programmes were offered during 2016/17 including the number of learners enrolled for each programme.

Table 3-1 INSETA supported learnership programmes 2016/17

Learnership Title	Enrolled
Certificate: Accounting	10
Certificate: Accounting Technician	29
Certificate: Financial Planning NQF L5	13
Contact Centre Operations	58
Contact Centre Support	6
Early Childhood Development	8
FETC Generic Management: Occupation Office Manager	25
FETC Marketing	48
FETC: Accounting Technician	9
FETC: Business Administration Services NQF Level 3	82
FETC: Generic Management: Occupation Office Manager NQF Level 4	29
FETC: Generic Management: Occupational Business Manager Level 4	48
FETC: Information Technology	4
FETC: Information Technology: Technical Support	10
FETC: Long Term Insurance NQF Level 4	602
FETC: Long Term Underwriter Level 4	1
FETC: Medical Claims Assessing NQF Level 4	61
FETC: Retail Insurance NQF Level 4	103
FETC: Short Term Insurance NQF L4	1536
FETC: Wealth Management NQF L4	488
Further Education and Training Certificate (FETC): Management and Administration	6
Human Resources Management and Practices Support	2
Information Technology: Technical Support	11
National Certificate in Contact Centre Operations	51
National Certificate in Financial Markets and Instruments	3
National Certificate: Automotive body repair	17
National Certificate: Banking	44
National Certificate: Contact Center and Business Process Outsourcing Support NQF 3	161
National Certificate: Financial Planning NQF Level 6	50

National Certificate: Generic Management	30
National Certificate: Generic Management: General Management Level 5	92
National Certificate: Information Technology (System Development)	45
National Certificate: Information Technology: End User Computing	175
National Certificate: Management	52
National Certificate: Spray Painting	6
National Certificate: Wealth Management NQF Level 5	867
National Certificate: Wholesale and Retail Operations	11
NC: Contact Centre and Business Process Outsourcing Support	54
NC: Financial Services Administrator NQF Level 3	73
NC: Financial Services NQF Level 2	43
Pharmacist Assistant	15
Project Management	18
Secretarial Administration	21
Short Term Insurance: Commercial/Industrial Underwriter NQF Level 4	2
Grand Total	5019

Source: INSETA, 2018.

Table 3-1 provides an overview of the learnership programmes offered by INSETA during the WBL intervention period of 2016/17. Over 5 000 learners participated across the 44 programmes that were offered during the period.

According to INSETA (2018), the most popular and widely applied for qualifications are Long-term Insurance NQF Level 4, Short-term Insurance NQF Level 4 & 5 and Wealth Management NQF Level 4 & 5, and this is supported by the data in the table. These categories were the most enrolled for learnership qualifications in 2016/17, with Short-term Insurance NQF Level 4 having the highest number of enrolments with 30% (1536 learners) of the total share of enrolments, followed by the Wealth Management NQF Level 5 national certificate at 17% or 867 learners. The Further Education and Training Certificate qualifications, Long Term Insurance NQF Level 4, and Wealth Management NQF Level 4 had a share of 12% and 10% of enrolments, respectively.

The survey data corresponds with the data presented here, as shown in Table 3-2 under Section 3.4.1.

3.2 Programme description

The key definition and criteria for the learnership learning programme are outlined in Section 1.2. The programme is described in the diagram in terms of what is expected from the workplace hosting beneficiaries, the learner as beneficiary, the training provider, and INSETA as the funding SETA.

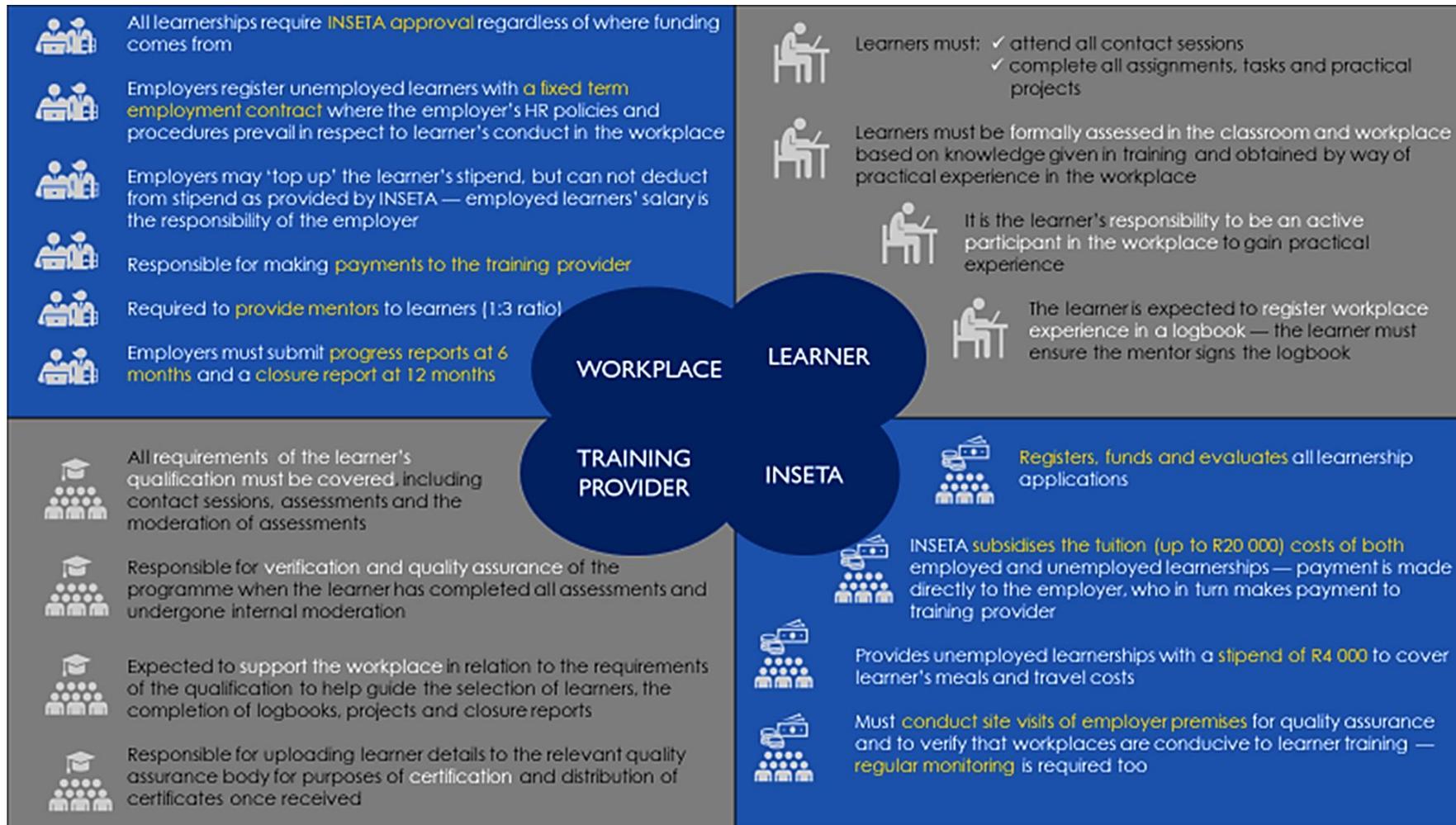


Diagram 3 Programme expectations of all role-players

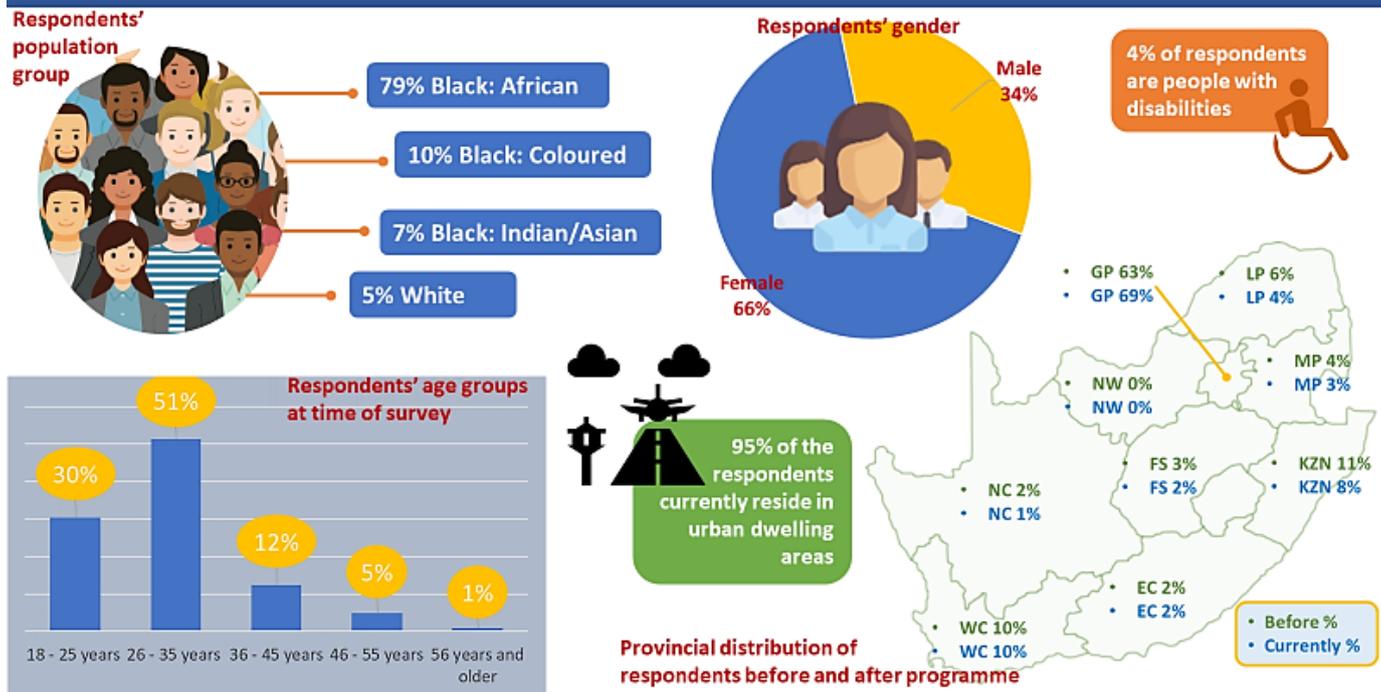
Source: via INSETA, 2018 by Urban-Econ

3.3 Profile of learnership beneficiaries



This section of the report gives a statistical overview of the sampled beneficiaries who participated in the learnership programme survey. The profile of the learnership beneficiaries is demonstrated in the fact sheet diagram. The section follows with deeper insight into the levels of education obtained by the participants and their current socio-economic outlook or living standards, which is supported by the type of area and dwelling the learners reside in.

Profile of all the Learnership respondents



The fact sheet on the profile of the learnership beneficiaries gives a snapshot of the demographics of the respondents. What follows is more insightful analysis into the description of the beneficiaries who participated in the survey.

In general, having matric is the minimum requirement for doing a learnership (INSETA, 2018). However, there are differences between the quality or type of matric that beneficiaries have obtained, and this is dependent on the type of school learners attended. Most respondents indicate that they mostly attended public school and/or low-cost schools, which speaks to the average income of the learners' households, areas of dwelling, and the level of their education.

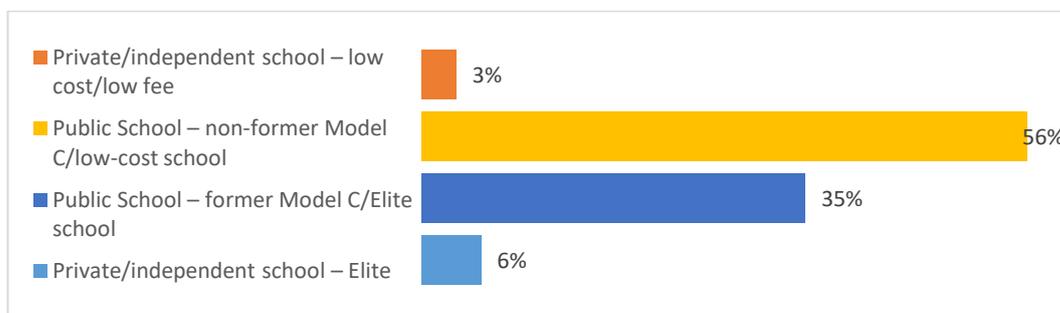
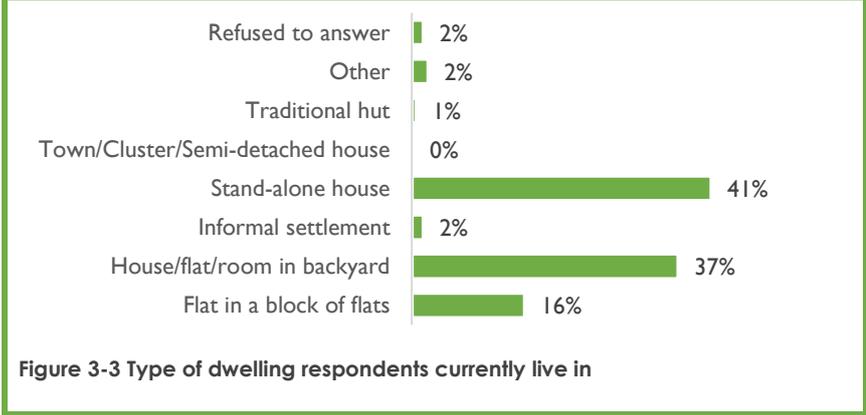
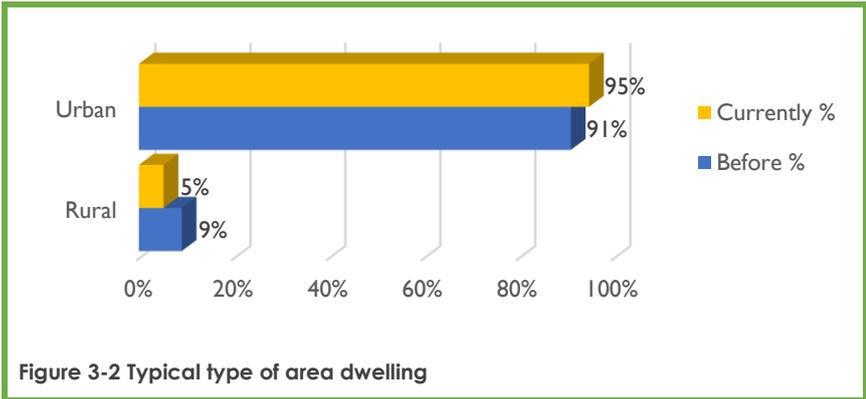


Figure 3-1 Type of school beneficiaries mostly attended



Figures 3-2 and 3-3 illustrate the type of living conditions of the respondents. The data shows a change in the type of dwelling of respondents before and after their participation in the learnership programme. There is a 4% difference in both rural and urban areas of dwelling among the respondents before their participation in the learnership programme of 2016/17.

A significant proportion of beneficiaries currently live in stand-alone houses or flats or rooms in backyards. This indicates that the respondents are either still living at home with family or are living in a backroom on family or friend's property. In the case that the respondent is renting out a room in a backyard, it is most likely a cheaper township rental where the tenant is not expected to pay for electricity and water, and no formal lease agreement is in place.

The assumption can be made that the respondent is simply living in a backyard room for free, which also implies that their economic standing is meagre. Only 16% of respondents indicated that they live in a flat in a block of flats. It can be assumed that this group consists of those who have reached financial independence and can afford to live on their own.

Figure 3-4 shows the provincial distribution of respondents before and after the learnership. The provinces considered to be more rural show a decrease, whereas more urban locations such as Gauteng show an increase of 6%, which means that learners relocated for better job opportunities or because they could afford to do so. Provinces considered less metropolitan, such as Mpumalanga and Limpopo show a decline in current residency. It can be assumed the respondents migrated from these areas to provinces considered more favourable for professional growth.

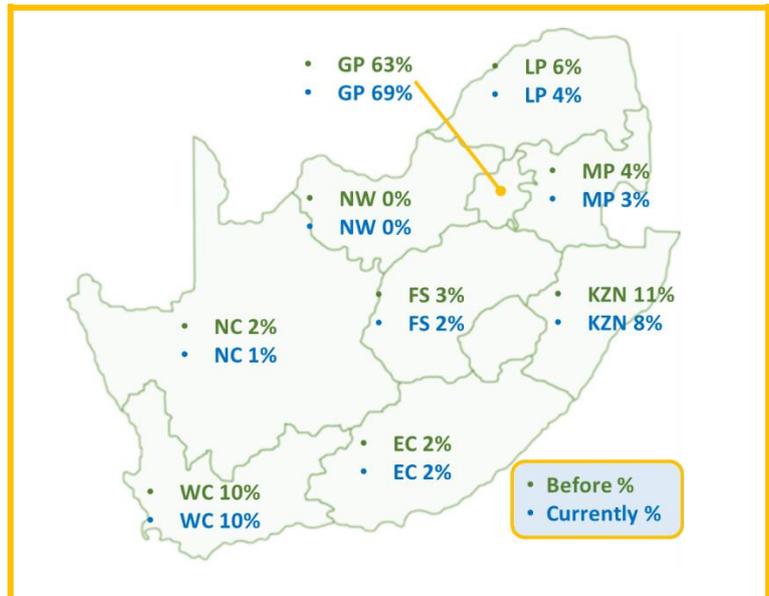
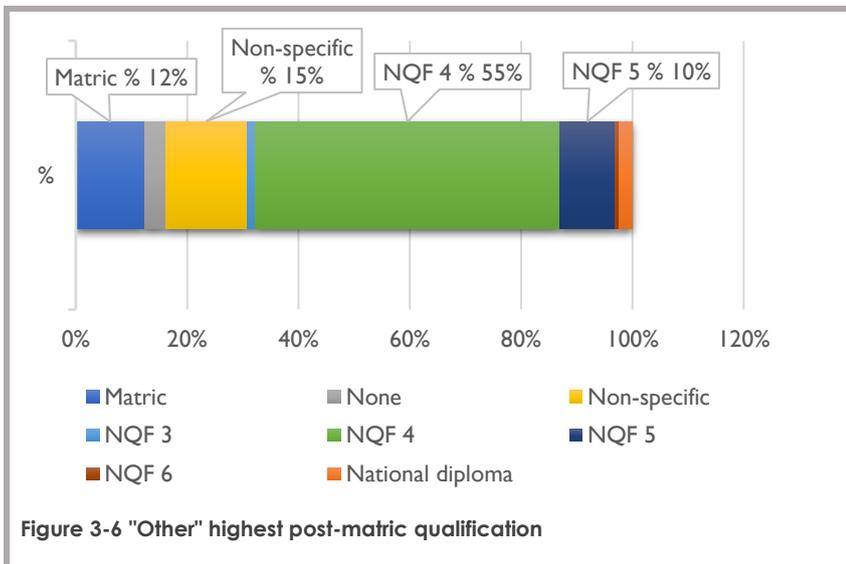
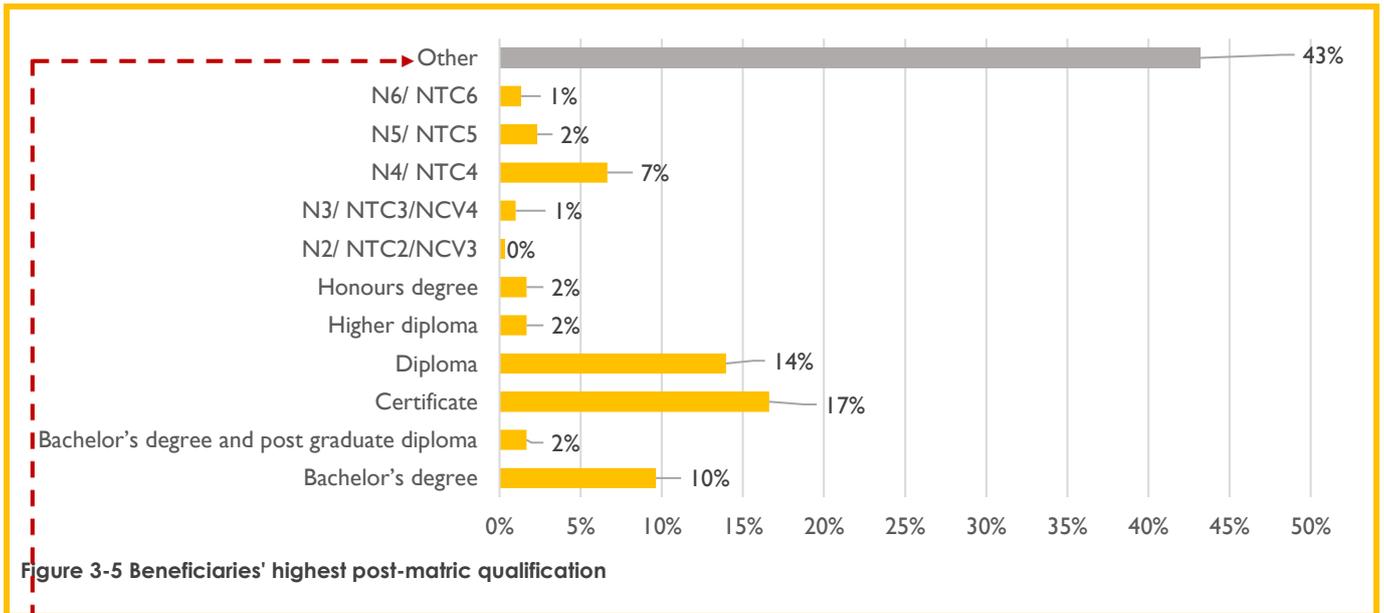


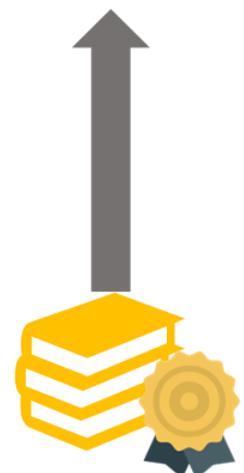
Figure 3-4 Current provincial distribution of respondents



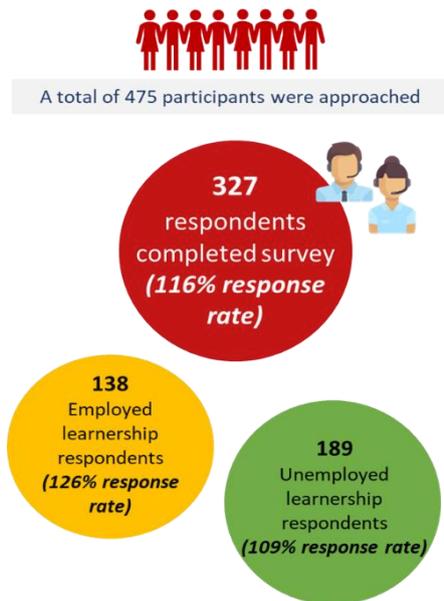
Most of the respondents have at least a post-matric certificate or diploma. Many of the beneficiaries have Level 4 or NQF 4 national qualifications. Only 10% of the respondents indicated that they have a bachelor's degree and about 4% have post-graduate degrees or diplomas. The beneficiaries are mostly trained and qualified in the Insurance and related services sector. Over 132 (or 41%) of the beneficiaries are qualified in Short Term Insurance Further Education and Training Certificates (FETC) at the NQF 4 level. The Wealth Management National Certificate (NC) is the next most popular qualification type with 85 respondents (26%), followed by the FETC qualification in Long Term Insurance at NQF 4 with 61 respondents (19%).

Table 3-1 Beneficiaries' qualifications

Learnership Title	Number of learners	%
FETC: Long Term Insurance NQF Level 4	61	19%
FETC: Medical Claims Assessing NQF Level 4	2	1%
FETC: Retail Insurance NQF Level 4	6	2%
FETC: Short Term Insurance NQF Level 4	132	41%
FETC: Wealth Management NQF Level 4	27	8%
NC: Wealth Management NQF Level 5	85	26%
NC: Financial Services Administrator NQF Level 3	10	3%
Grand Total	323	100%



3.4 Learnership beneficiary responses



Section 3.3 of the report describes the responses collected from the beneficiaries who were surveyed for the learnerships learning programme for the 2016/17 intervention period. As indicated previously, from the overall population size, a total of 2 428 were extracted for employed (1 090) and unemployed (1 338) learnerships. From the respective groups, 109 were sampled for employed learnerships, while 173 were sampled for unemployed learnerships.

Despite the derived sample size for each category of learnerships, 475 respondents were contacted in an effort to achieve a 95% confidence level. Out of the 475, 69% or 327 participants were achieved. **The information and analysis that follows in the sub-categories hereunder are based on the group of actual participants — the 327 learnership beneficiaries from 2016/17 intervention period.**

3.4.1 Learnership information

This section gives an overview of the respondents and the learnership-related information pertaining their time during and after the learning programme. An overview of the beneficiaries' learnership programme is given along with their reasons for partaking in the learnership. In this section, we also learn about where learners are currently employed, their key sources of information about the learnership, and who their training providers and employers are.

Learnership information of all the respondents



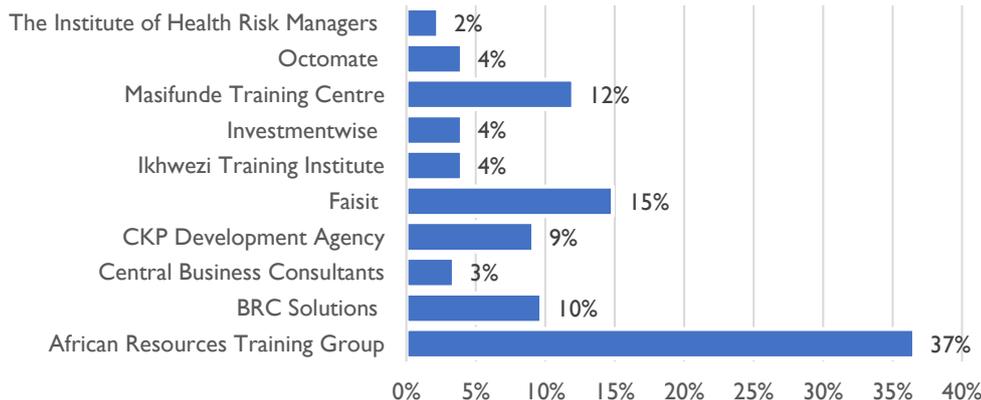


Figure 3-7 Main training providers for unemployed learnerships (UL)

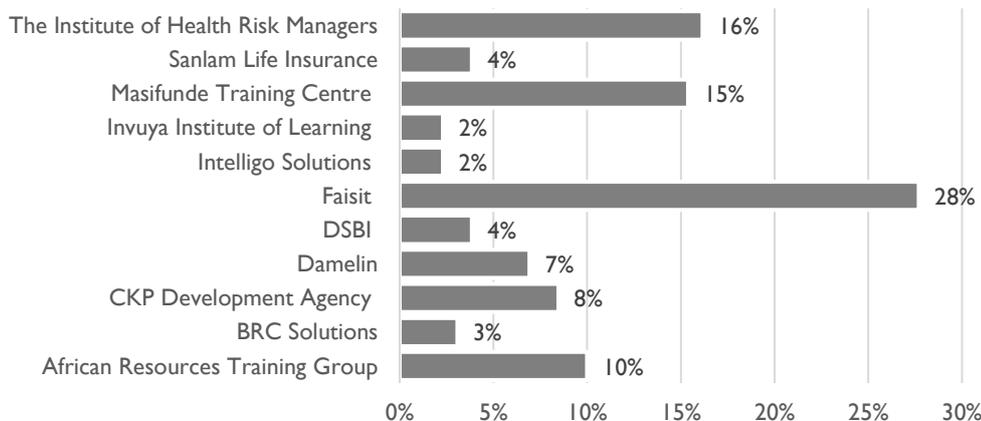


Figure 3-8 Main training providers for employed learnerships (EL)

Figure 3-11 to 3-14 reveal which training providers and employers mostly hosted both unemployed learnerships as well as employed learnerships during the 2016/17 intervention period of the programme. The African Resources Training Group hosted the largest share of unemployed learnership beneficiaries (37%), while Faisit hosted the largest share of employed learnership beneficiaries (28%). The training providers provide specialist qualifications in the financial services industry and the insurance-related sector respectively.

Masifunde Training Centre and CKP Development Agency hold an almost equal percentage share of hosted beneficiaries for both unemployed and employed learnerships, at above 10% for the former and around 8% for the latter in each group. While the Institute of Health Risk Managers hosted a smaller percentage of unemployed learnerships, it trained over 15% of employed learnerships.

In Figure 3-13 and 3-14 we can identify which employers mostly hosted unemployed and employed learnership beneficiaries in 2016/17. Santam Insurance, at 23%, hosted the largest share of unemployed learnerships, while Avbob Mutual Assurance Group, at 20%, hosted the largest share of employed learnerships. Mutual and Federal Development Trust and Liberty hold the next largest share of unemployed learnerships hosted as employers, at 16 and 15 percent, respectively.

For employed learnerships, Sanlam Life Insurance and Government Employees Medical Scheme (GEMS) are the employers with the next largest share as hosts of employed learnerships, at 13 and 12 percent, respectively. Notably, Sanlam Life Insurance hosted more than half more employed learnerships than the unemployed group. Alexander Forbes Group & Technology Services holds the most consistent percentage share for both groups at around 9% on average.

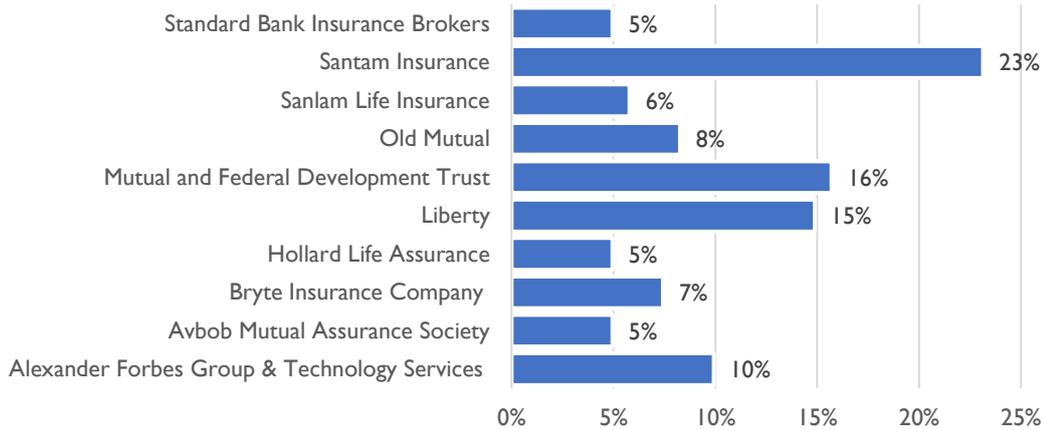


Figure 3-9 Main employers for unemployed learnerships (UL)

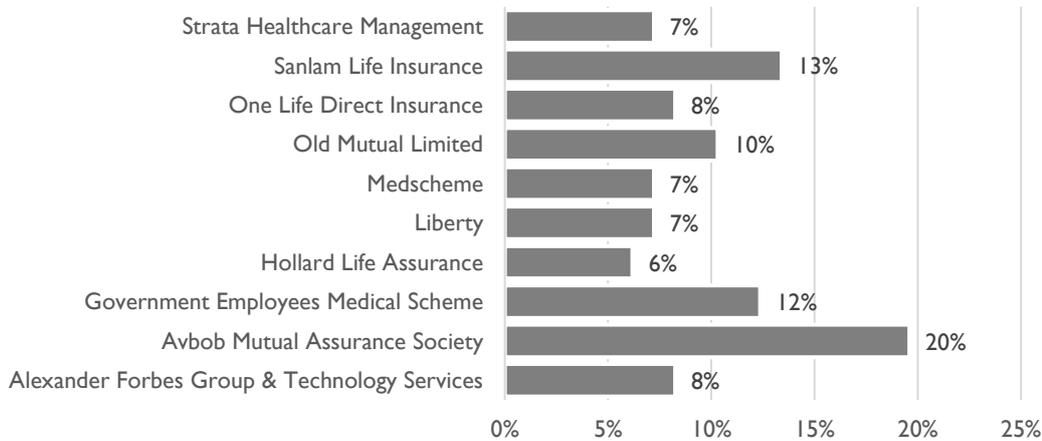


Figure 3-10 Main employers for employed learnerships (EL)

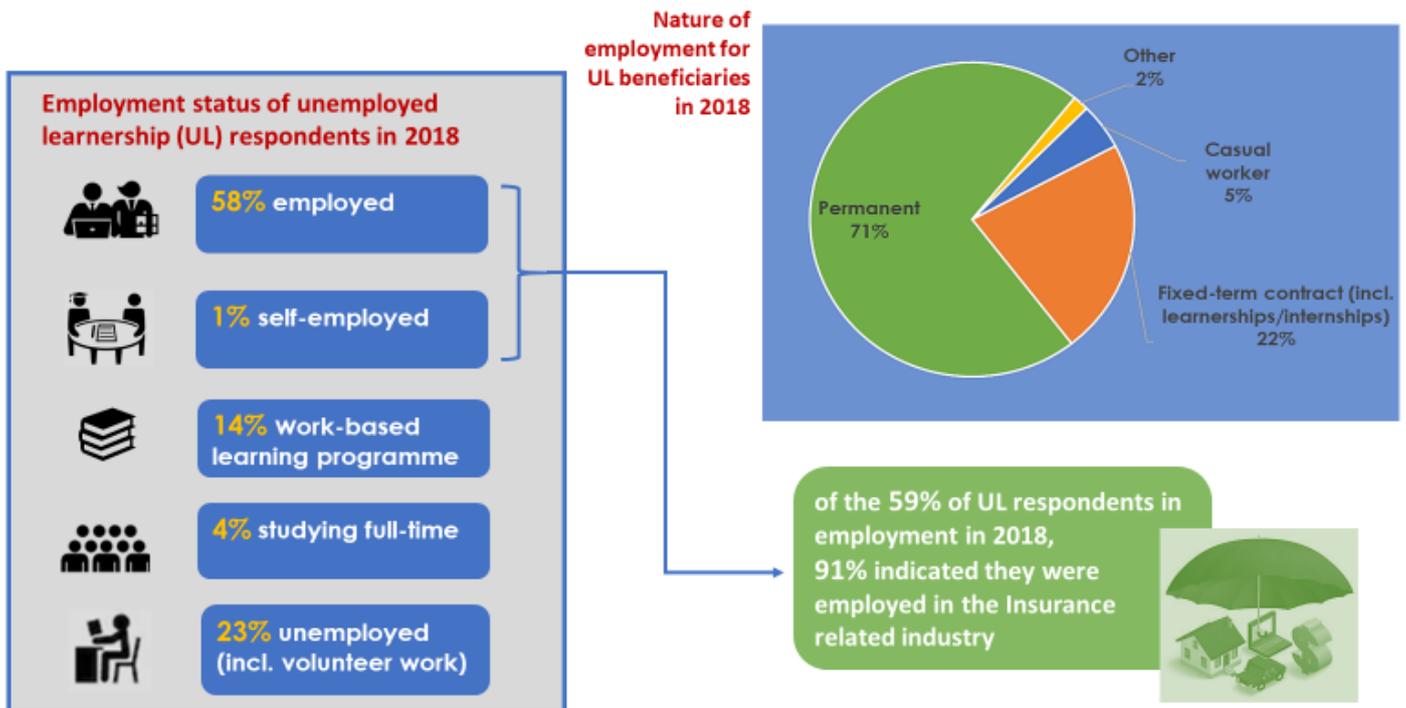
3.4.2 Employment outcomes of the learnership respondents

The employment outcomes of the learnership beneficiaries reveal information about the learners' current employment status, the nature of their employment and the type of employer the employed group mostly work for. The section presents the findings split for both the unemployed learnerships (UL) group and the employed learnerships (EL) group. Parallels are drawn between the two learnership groups and the status of their employment outcomes prior to (2015) the learnership, and after (2018) the learnership programme.

The section further reveals the impact the workplace-based learning (WBL) experience has had on the two sets of learnership beneficiaries since graduating from the programme — this information is supported by changes in the respondents' monthly income, whether learners had any career advancement and to what extent, and other related matters.

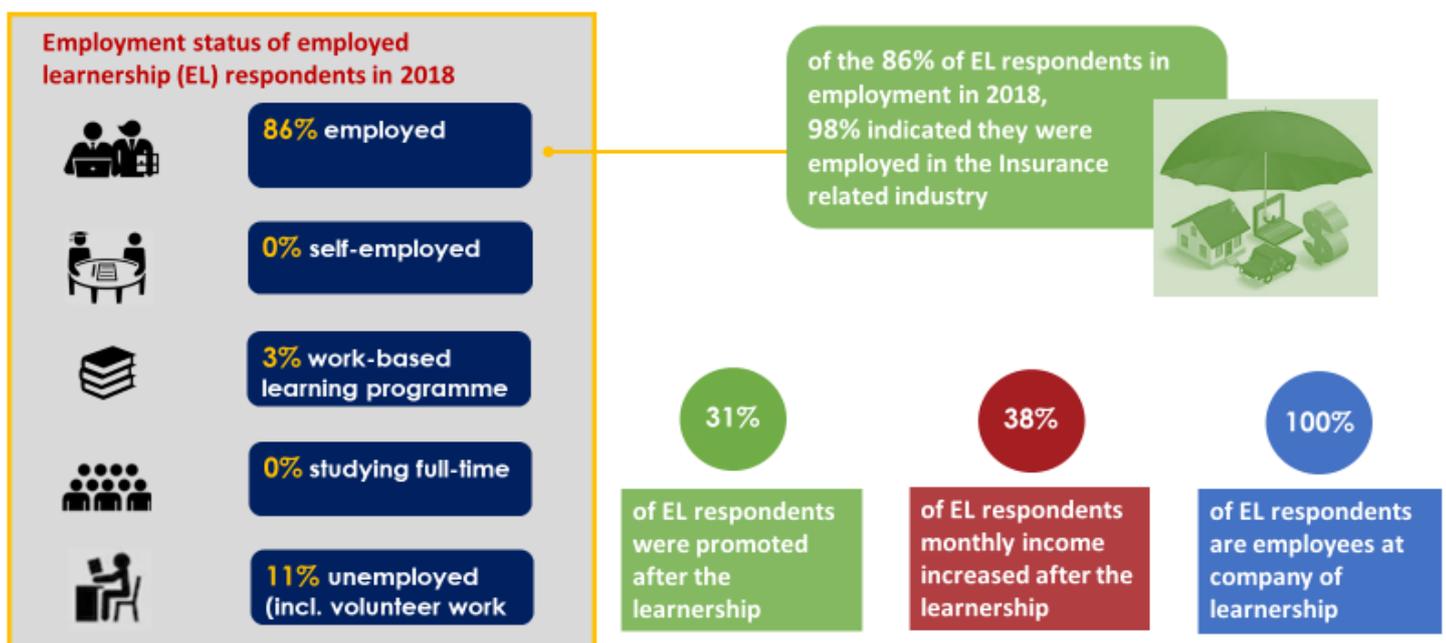


Employment breakdown of UL (unemployed) beneficiaries



The diagrams above and below are snapshots of information extracted from the overall findings from the learnership survey for unemployed graduates and employed graduates who participated in the programme. The information presented describes the sum of responses collected from the survey for both groups of learnerships, unemployed (UL) and employed (EL). The facts illustrated in the diagrams are elaborated upon throughout the section.

Employment outcomes of EL (employed) beneficiaries



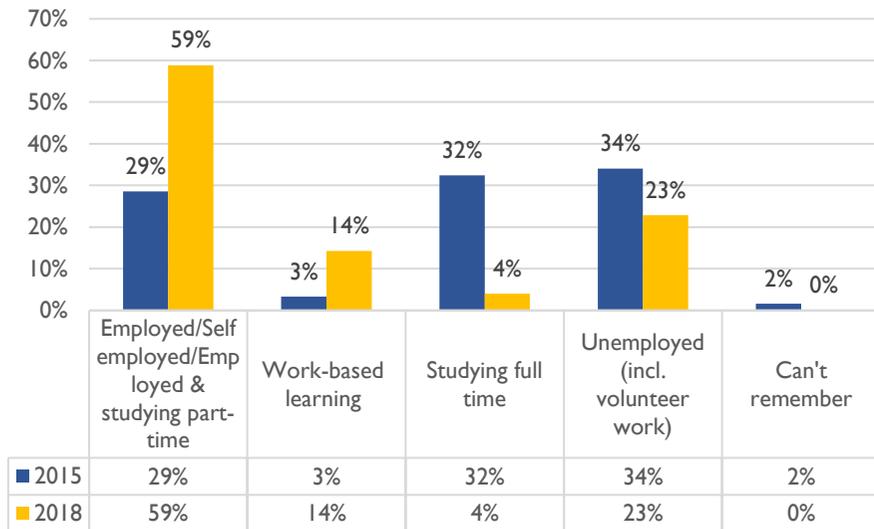


Figure 3-71 UL employment status before (2015) and after (2018) the learnership programme

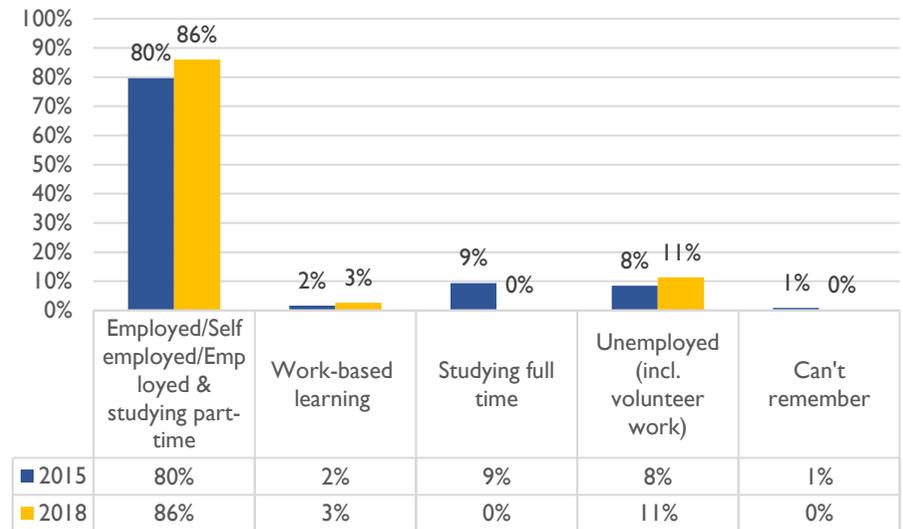


Figure 3-12 EL employment status before (2015) and after (2018) the learnership programme

The two graphs above give an overview of the employment activities of unemployed learnerships (UL) and employed learnerships (EL) prior to participating in the WBL programme (2015) and their employment activities after partaking in the programme in 2018. Figure 3-11 shows that in 2015 a significant proportion of UL respondents were either in full-time studies or unemployed/volunteering. In comparison, only 29% of UL respondents were in some form of employment up until 2015, which could mean that respondents either lost or quit their jobs in the 2015/16 period and pursued the unemployed learnership as a result.

Only 3% were participating in a learning programme at the time, compared to 14% of respondents who indicated they are in a WBL programme in 2018. Of the 14% in a work-based learning programme in 2018, 88% were doing a learnership and 12% an internship.

The proportion of respondents in employment, including full-time employment, self-employment, or employed and studying part-time, grew by 30% to 59% in 2018. This is a positive reflection on the number of students who graduated since their full-time studies in 2015, where 32% indicated they were full-time students to only 4% in 2018. This means that the respondents graduated from their tertiary studies into a workplace learning programme during the period 2015-2018 and that resulted in a significant proportion of the respondents finding employment after the learnership intervention period of 2016/17.

The statistics for employed learnerships (EL) are slightly different. While most of the respondents were already in employment in 2015, the share of employed respondents grew to 86% in 2018 from 80% in 2015. However, the percentage share of unemployed respondents for EL grew to 11% in 2018 from 8% in 2015. This implies that a few respondents either lost or quit their jobs after the learnership.

Ultimately, the employment status findings of UL and EL beneficiaries show positive employment growth in the Insurance and related services industry for those who participated in the learnership programme of 2016/17.

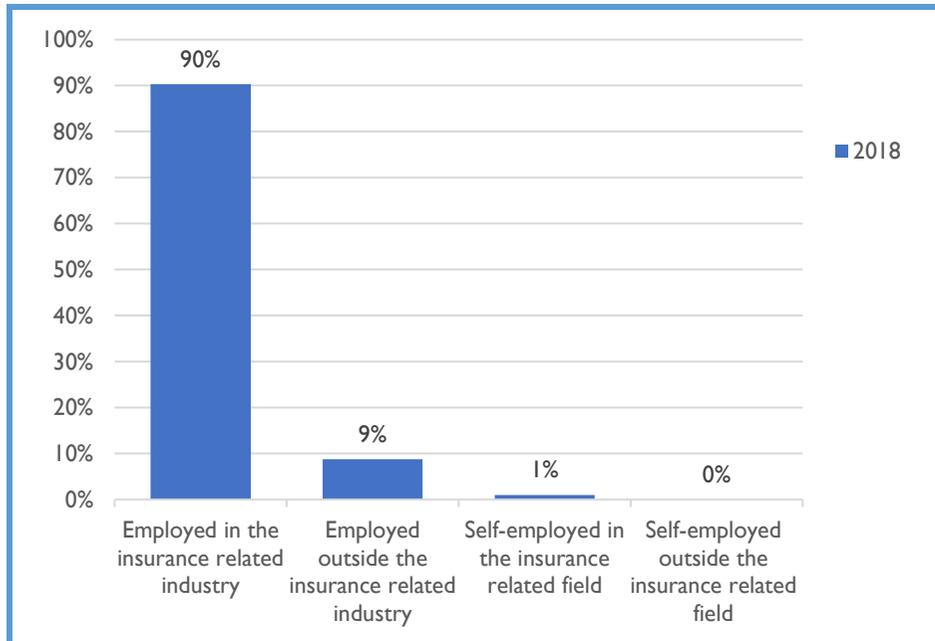


Figure 3-13 UL employed/self-employed in the industry in 2018

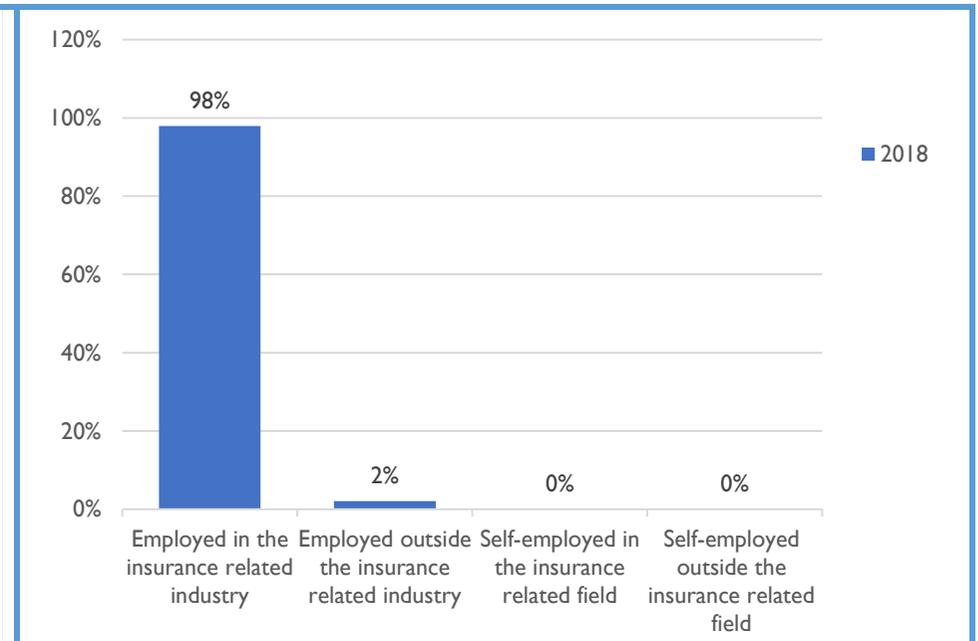


Figure 3-14 EL employed/self-employed in the industry in 2018

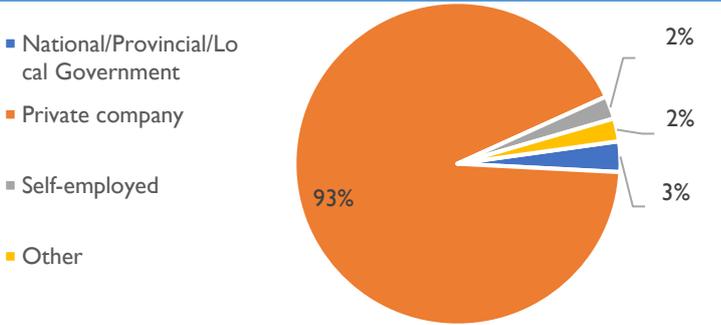
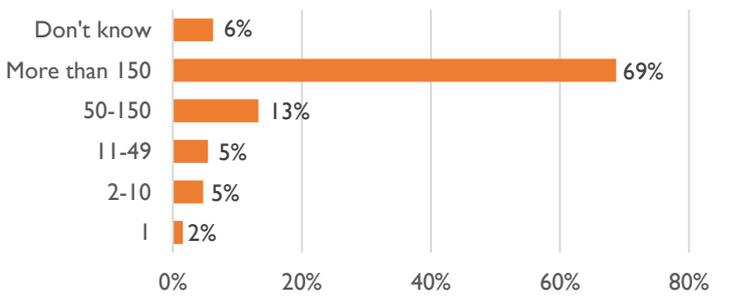
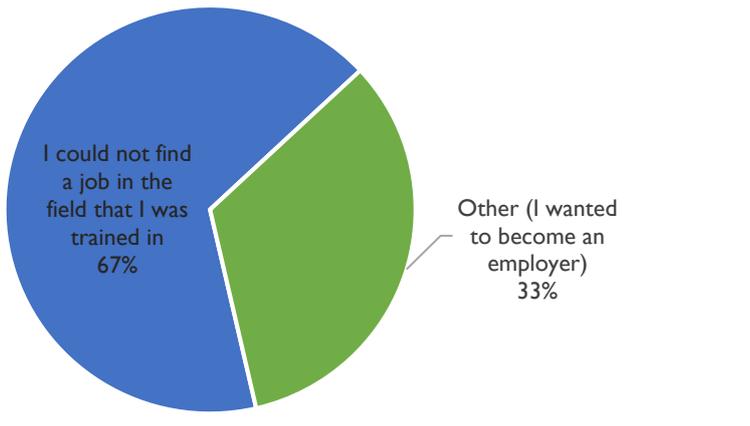
Regarding those who were employed, self-employed, employed and studying part-time before the learnership programme (2015) and after (2018), the two graphs show more detailed trends of the learnership beneficiaries' destinations in the industry for each split.

For the UL respondents (Figure 3-13), of the 59% in employment in 2018, 91% were employed in the Insurance and related industry in 2018. This is a positive reflection on the impact of the INSETA learnership programme as it shows that the experience the learners gained in 2016/17 resulted in their finding employment in the industry.

Of the 86% of EL respondents in employment in 2018, the majority (98%) were employed in the Insurance and related services industry after the learnership programme, as shown in Figure 3-14. Only two percent were employed outside the industry. This means that the programme effectively increases the employment opportunities for beneficiaries in the Insurance industry.

The above information will now be complemented with more detailed findings for each of the learnership groups. The data below address the reasons the respondents are in their current employment status, and where applicable, describe the circumstances under which they are either employed, self-employed or even studying. For the unemployed learnerships (UL), we specifically examine how long they were unemployed prior to the learnership, how soon after completion they found employment, and the length of their current employment. Information is also presented on the professional and income growth (or lack thereof) the unemployed and employed learnership respondents have achieved since partaking in the workplace-based learning programme of the 2016/17 intervention period.

FURTHER INSIGHT INTO EMPLOYMENT OUTCOMES FOR UNEMPLOYED LEARNERSHIPS (UL)

 <p>■ National/Provincial/Local Government ■ Private company ■ Self-employed ■ Other</p>	<p>Of the unemployed learnerships (UL) who were employed in 2018, a large majority (93%) work for private companies, while the remaining proportion of beneficiaries found employment in governmental sectors, whether national, provincial or local. Two percent of UL respondents indicated that they are self-employed as the type of employer.</p>
	<p>The majority of unemployed learnership respondents work for large-size companies, or companies with over 150 employees. Just over 10% of UL respondents work for micro to small-sized employers, while nearly 15% indicated they work for companies who employ between 50-150 people, or medium-sized companies. The responses recorded here are in alignment with those in Figure 3-15 and 3-16, which shows that the respondents are employed at large, well-known organisations in the Insurance and related services sector.</p>
	<p>Although a small number of the UL respondents stated that they were self-employed, 67% cited that they could not find employment in their field of training, while 33% had entrepreneurial interests. In comparison to those individuals who are actual employees, the proportion of self-employed is relatively small – this speaks positively of the employment opportunities in the Insurance and related services sector.</p> <p>As outlined earlier, out of the group of UL respondents who indicated they were unemployed/volunteering in 2018, a very small share indicated volunteering, majority responded they were unemployed. Out of the</p>

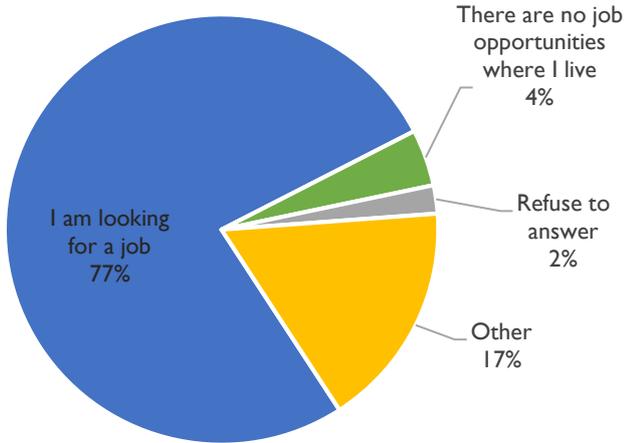


Figure 3-88 Reasons why the UL beneficiary is unemployed or volunteering

group of unemployed individuals, 77% said they were actively looking for a job; the other respondents indicated that there are no job opportunities in the Insurance sector where they are geographically situated. Those who responded 'Other' mostly stated personal reasons for their unemployment, such as maternity responsibilities. A few of the respondents seem to not have the financial resources to be active job-hunters, while others wish to further their skills and education.

Although a significant majority of the unemployed learnerships respondents who are currently employed are working in the Insurance and related sector, 10% indicated that they are not, despite doing a learning programme in the sector. Figure 3-19 demonstrates the main reasons why UL respondents are employed outside the Insurance industry. Nearly 65% say it is because they could not find a job in the industry. A total of 18% indicated lack of job security and that they got better salary offers elsewhere. A fair amount suggest that they had career interests outside the industry or found more appealing job offers in other industries.

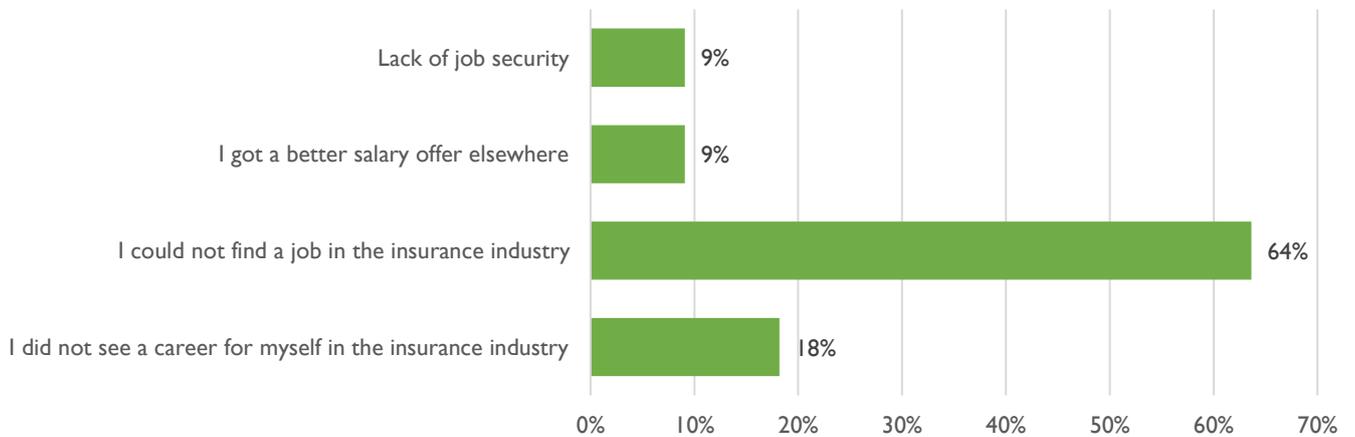


Figure 3-19 Reasons why UL beneficiary is not employed in the Insurance-related industry

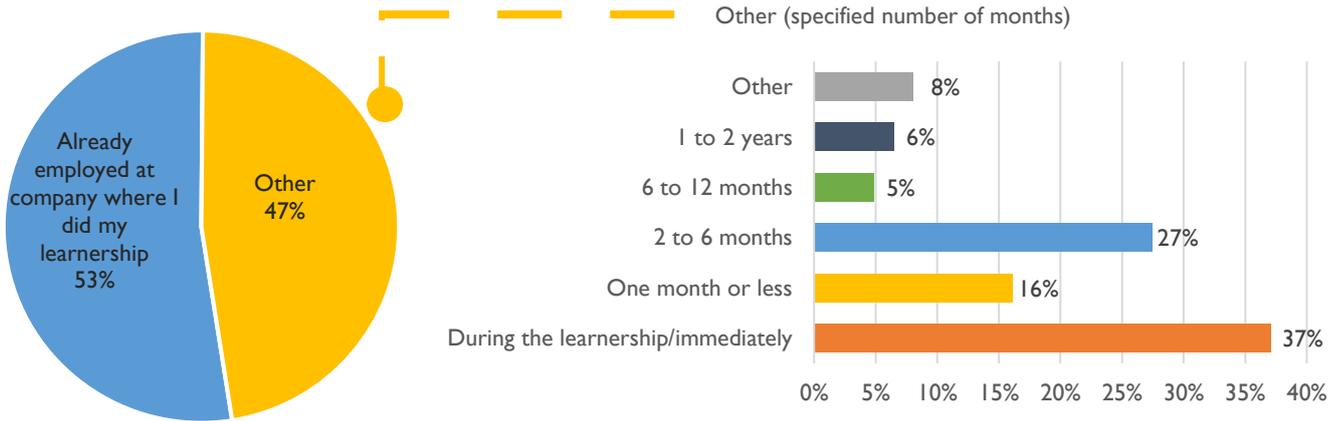


Figure 3-20 How soon after the UL did the beneficiary find employment

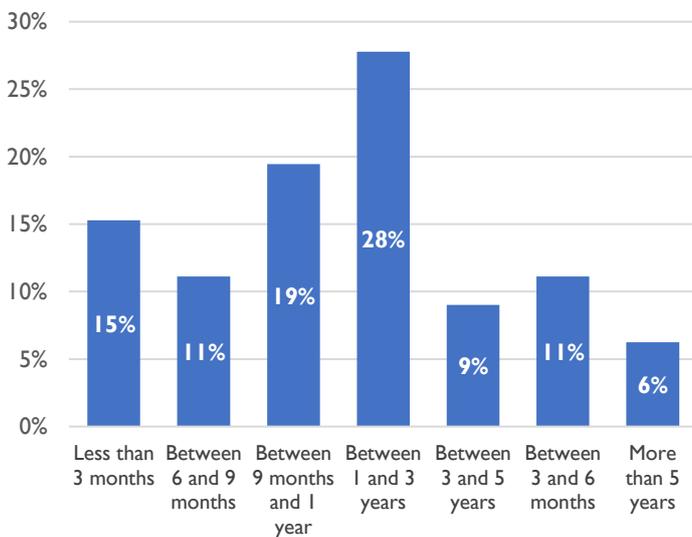


Figure 3-21 Length of unemployment before the learnership

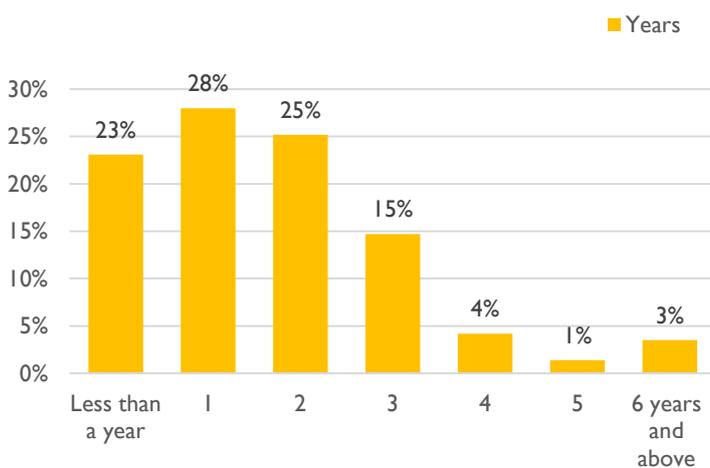


Figure 3-22 Length of current employment

Figure 3-20 shows that about 53% of UL respondents were employed at the company where their learnership took place in 2016/17. For those who indicated 'Other', a proportion of 37% of respondents were employed during the time of the learnership. Just under 30% found employment in less than six months, while 16% indicated that they found employment within one month after completing the learnership programme. It took up to a year for 5% of the respondents to find employment, and up to two years for 6% of the respondents. These findings mean that fewer beneficiaries were unemployed for an extended amount of time than those who almost immediately found employment in the sector.

Furthermore, the employment outcomes for the UL respondents after the learnership are remarkably better than before the programme. Figure 3-21 indicates that most respondents were unemployed for longer periods of time before participating in the programme, with 28% being unemployed for up to three years, and 6% of those asked indicated they were unemployed for more than five years. The positive turnover of employment for the participants of the programme speaks to the level of success workplace-based learning (WBL) programmes can have on unemployed persons and those in need of skills development.

Over 50% of the UL respondents have been in employment between one to two years. A proportion of 23% of respondents have been in employment for under a year or between 1-12 months. Together, those who have been employed for up to two years or less make up a share of 76% compared to a total share of about 24% for those employed for over three years. From this total, 5% have been employed for over five years. Again, this speaks to the relative stability of employment in the Insurance and related services sector.

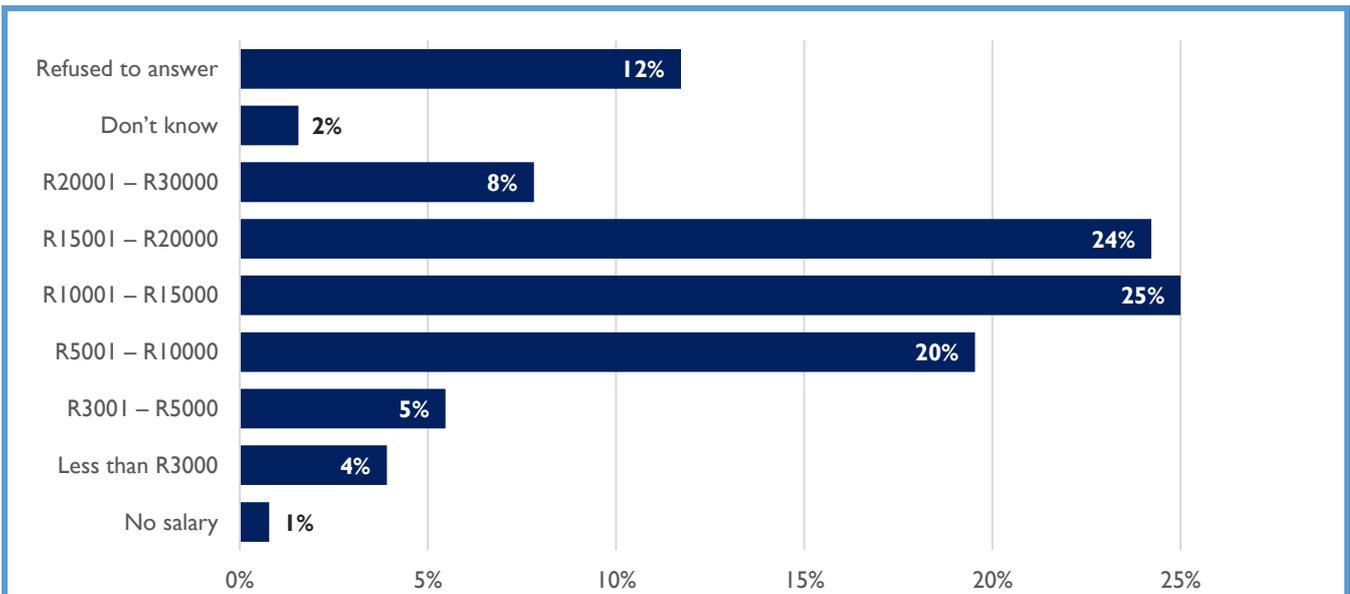


Figure 3-23 Average gross monthly income of UL beneficiaries

Based on the criteria for the INSETA-funded learnership, unemployed learners receive a stipend of R4 000, while employed learnerships receive no stipend. Figure 3-23 shows that most of the respondents are receiving a gross monthly income upward of R5 000.

A total share of nearly 70% of the UL respondents are earning a gross monthly income of between R5 000 and R20 000, only 9% are earning R5 000 or less, and 8% are earning upward of R20 000. This means that for a large proportion of the learnership beneficiaries who were previously unemployed, the learnership positively impacted their financial status.

The UL respondents evidently experience career advancement following participation in the learnership programme. Most were placed in permanent employment and experienced an increase in their monthly income.

The general outcomes for participants of the learning programme have been positive and the impact on their livelihoods and career prospects have been vastly beneficial; this is demonstrated in Section 3.4.4.

FURTHER INSIGHT INTO EMPLOYMENT OUTCOMES FOR EMPLOYED LEARNERSHIPS (EL)

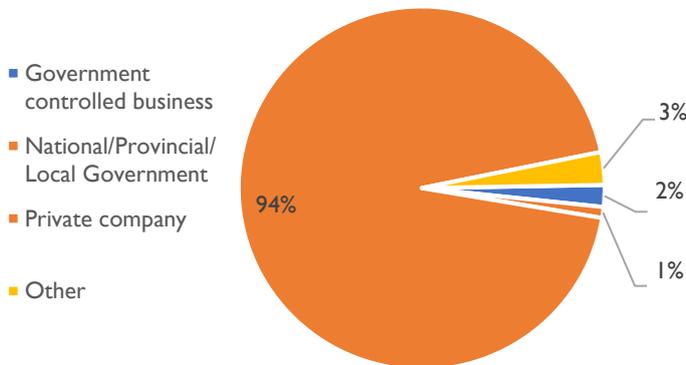


Figure 3-24 Type of employer EL beneficiaries work for in 2018

A large majority (94%) of employed learnerships (EL) worked for private companies in 2018. The remaining proportion work for government-controlled business and governmental sectors, including national, provincial and local government. Three percent of EL respondents indicated they work for 'other', non-specific, types of employers,

Similar to the unemployed learnership respondents, most of the EL respondents indicate that they are employed under large-size companies, or companies with more than 150 employees. Two percent work for micro-sized employers who employ between 2-10 persons, 5% work for small-sized companies, 11-49 employees, and just over 10% indicated they work for medium-sized companies employing between 50-150 persons.

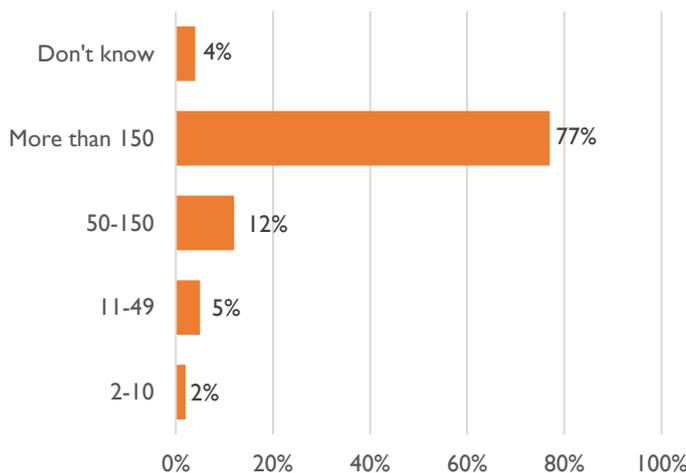


Figure 3-25 Number of employees at EL beneficiary place of employment

These findings correspond with the data recorded in Figures 3-9 and 3-10, which shows that the learnership beneficiary respondents from either group are mostly employed at large organisations in the Insurance and related services sector.

As opposed to the unemployed learnership (UL) respondents where a small percentage indicated they were self-employed, none of the employed learnership (EL) respondents indicated self-employment in or outside the industry. This could infer that there are ample employment opportunities in the sector and that the graduates are satisfied with their careers in the industry.

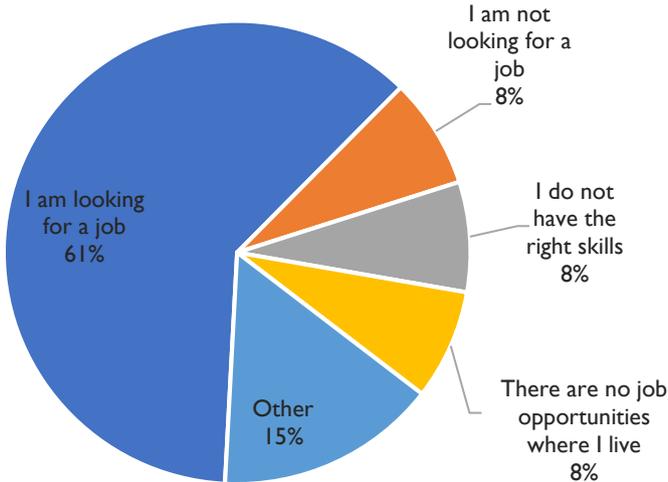


Figure 3-26 Reasons why EL beneficiary is unemployed or volunteering

Again, in contrast to the UL respondents where 10% indicated that they are not employed in the Insurance and related services industry, only one EL respondent indicated the same. The EL respondent states that they did not see a career for themselves in the industry as the reason why they are employed outside the industry in 2018.

As outlined earlier, none of the EL respondents indicated doing volunteer work in 2018, thus Figure 3-26 responds to the proportion of respondents who indicated they were unemployed in 2018. A share of 61% of unemployed EL respondents said they were actively looking for a job; a fair share indicated they were not looking for a job, did not have the right skills or that there were no job opportunities available in the Insurance industry where they are geographically situated. Those who responded 'Other' mostly stated personal reasons for their unemployment.

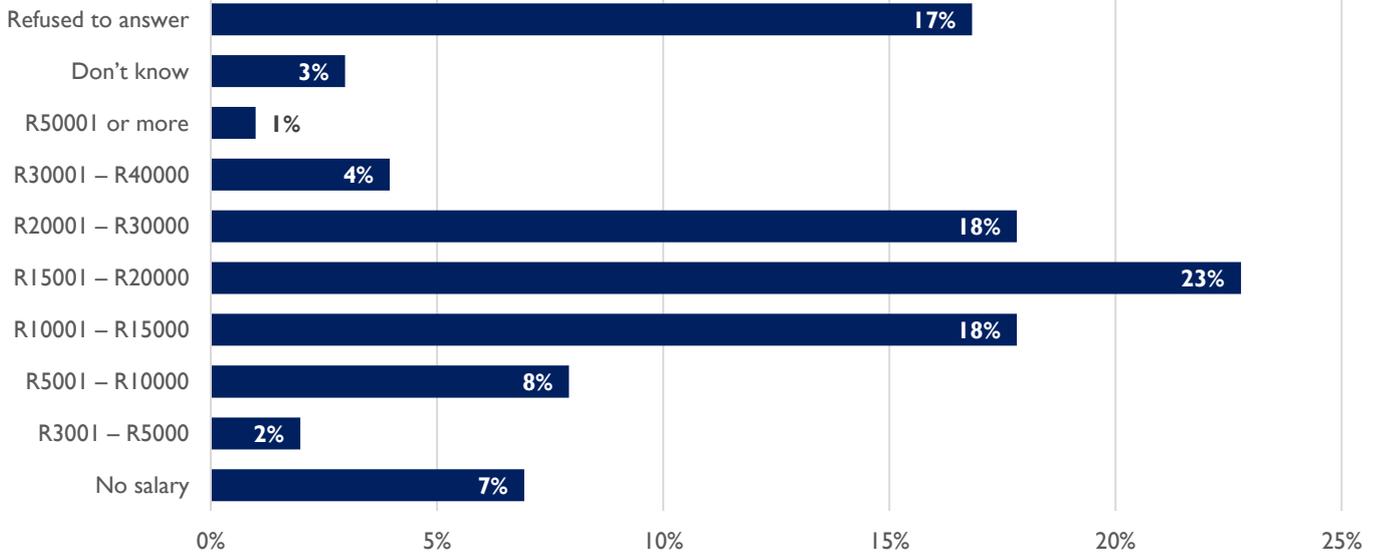


Figure 3-279 Average gross monthly income of EL beneficiaries

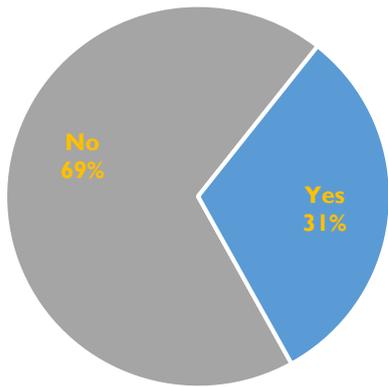


Figure 3-28 Was the EL beneficiary promoted after the learnership?

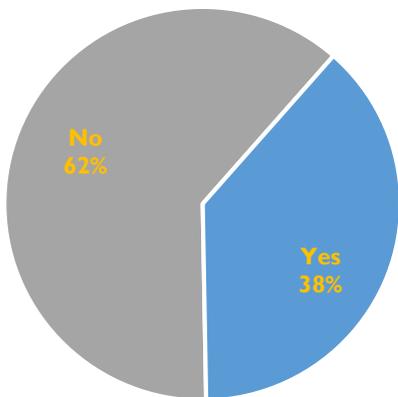


Figure 3-29 Did the EL beneficiary's monthly income increase after the learnership?

Only 38% of employed learnership (EL) respondents indicated they achieve an increase in their monthly income following the learnership. The majority (62%) of EL respondents did not receive a salary increase.

Based on the criteria for the INSETA-funded learnership programme, employed learnerships are not privy to a stipend – only their intuition is covered. Despite this, the gross monthly income ranges for EL respondents are greater than those recorded for UL respondents, with a majority earning salaries upward of R10 000 and between R10 000 and R30 000.

Only 8% of EL respondents are earning a salary between R5 000 and R10 000 compared to 20% of UL respondents. Moreover, while the UL respondents' salary range capped at R30 000, at least 5% of EL respondents recorded receiving salaries above R30 000.

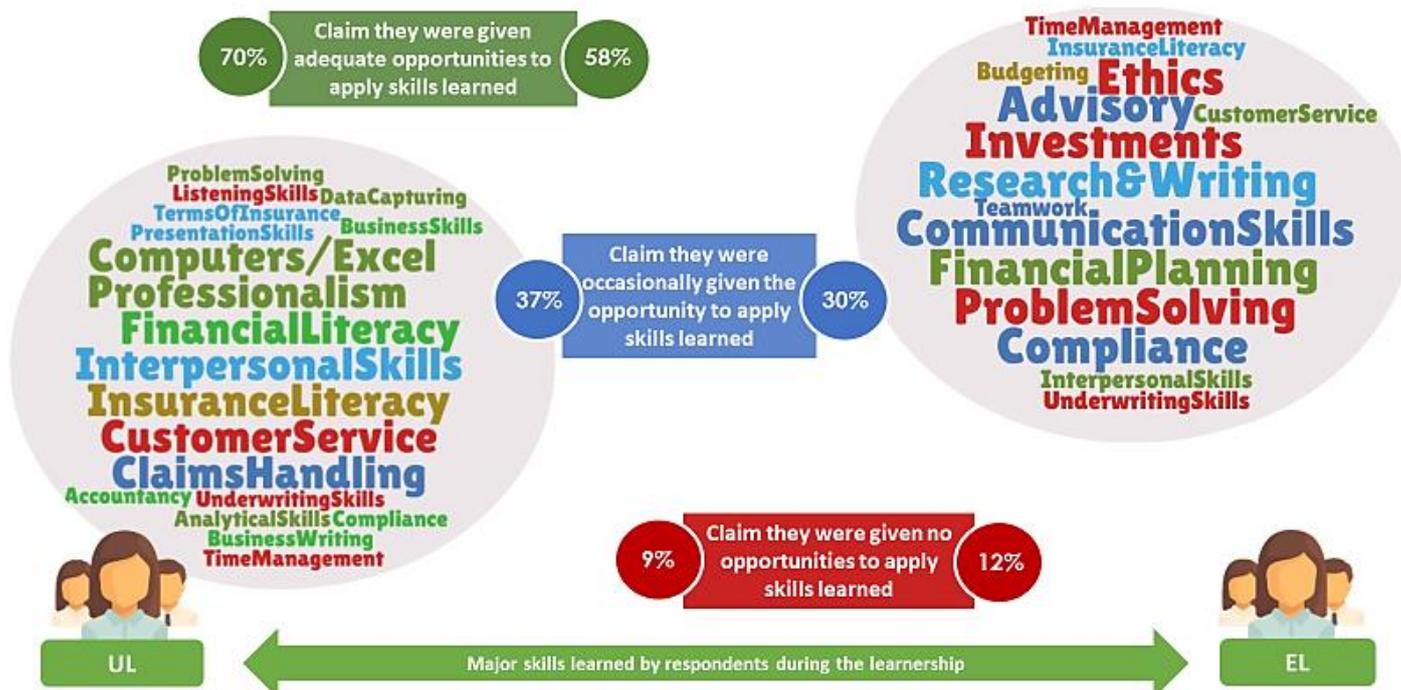
The difference in the monthly income ranges for unemployed and employed learnerships possibly speaks to the value of work experience in the Insurance and related services sector. The UL group are assumed to have less work experience than the EL group since they are new graduates. Overall, employment in the Insurance industry appears to have positively impacted the financial situation of the learners.

Notably, 31% of EL respondents indicated that they achieved promotion after participating in the learnership programme. This is a significant proportion of individuals whose careers advanced due to acquiring more knowledge and skills through the programme. This speaks positively to the impact the learnership has on the career and professional advancement possible for participants of the programme. The impact on the livelihoods and career prospects of the INSETA-funded learnership beneficiaries is described further in Section 3.4.4.

3.4.3 Knowledge and skills gained during the learnership

This section demonstrates what the beneficiaries of the learnership learned during the programme in 2016/17, as well as how the skills acquired transferred into the professional and career life, and whether they were applicable at the places of their employment during the workplace-based training. This section reveals extent to which the beneficiaries found the programme crucial to their overall development and their experiences as a beneficiary of the programme in the Insurance and related services sector.

Knowledge and skills gained during the Learnership



The fact sheet above illustrates the skills the learnership beneficiaries mostly gained during the programme for either group. The UL group learned an equal share of soft skills and technical skills, which is at a more introductory level to work and industry-related work experience. This makes sense since this group of learners were mostly unemployed and full-time students before participating in the programme. The learnership exposed to them to key industry concepts and the world of work.

The EL respondents, on the other hand, cite more technical, analytical skills and business principles gained during the programme. This group of learners were previously exposed to work and the industry. The learnership programme only further enhanced their capabilities and strengthened their insight, industry skills and competencies as professionals.

While 70% of UL respondents indicated that they were adequately provided with opportunities to apply the skills during the learnership, only 58% of EL respondents feel the same. A fair amount in each group indicated they were occasionally given the chance to apply skills, and a notable percentage (9% UL and 12%) said they were not provided any opportunities to practice the skills they learned.

Section 3.4.5 explores the respondents' remarks about the programme as a whole and what they feel could be improved — more relevant work experience and exposure is a key issue for them.

Knowledge and skills gained during the Learnership

% of respondents in "strong" agreement with statements around skills development during the learnership



As shown in the previous diagram, the respondents generally indicated that the programme had a positive impact on their soft skills and level of professionalism, where they learned or enhanced their interpersonal conduct and professional interaction with others and clients in a business setting. Both groups of respondents also showed a high regard for the insurance and finance knowledge they obtained during their learnerships, where some reflected on how it has impacted decisions in their personal life too.



Above this, the learners were asked less subjective and more specific questions pertaining their skills and knowledge development from the learnership. The respondents mostly showed a positive response.



Both UL and EL groups indicated that they learned significantly more about the Insurance and related services industry. Both groups of respondents also strongly agreed that the learnership enhanced their professional skills, as well as providing them with new skills; however, this is truer for the UL respondents than the EL group. Although the respondents showed agreement, both groups of respondents felt less positive about the impact the learnership had in its ability to develop their skills to the point of finding or securing employment.

3.4.4 Perceived impact of the programme on beneficiaries

This section gives insight into the impact the learnership had on beneficiaries, based on their perceptions. The findings presented are split for unemployed learnerships (UL) and employed learnerships (EL). The employability and career pathways of the respondents are outlined, as well as the professional and financial changes they have experienced since the learnership. The section also explores beneficiaries' perceptions of job satisfaction and advancement achieved because of the learning programme.

Perceived impact of the programme on UL respondents

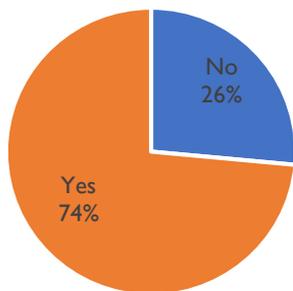
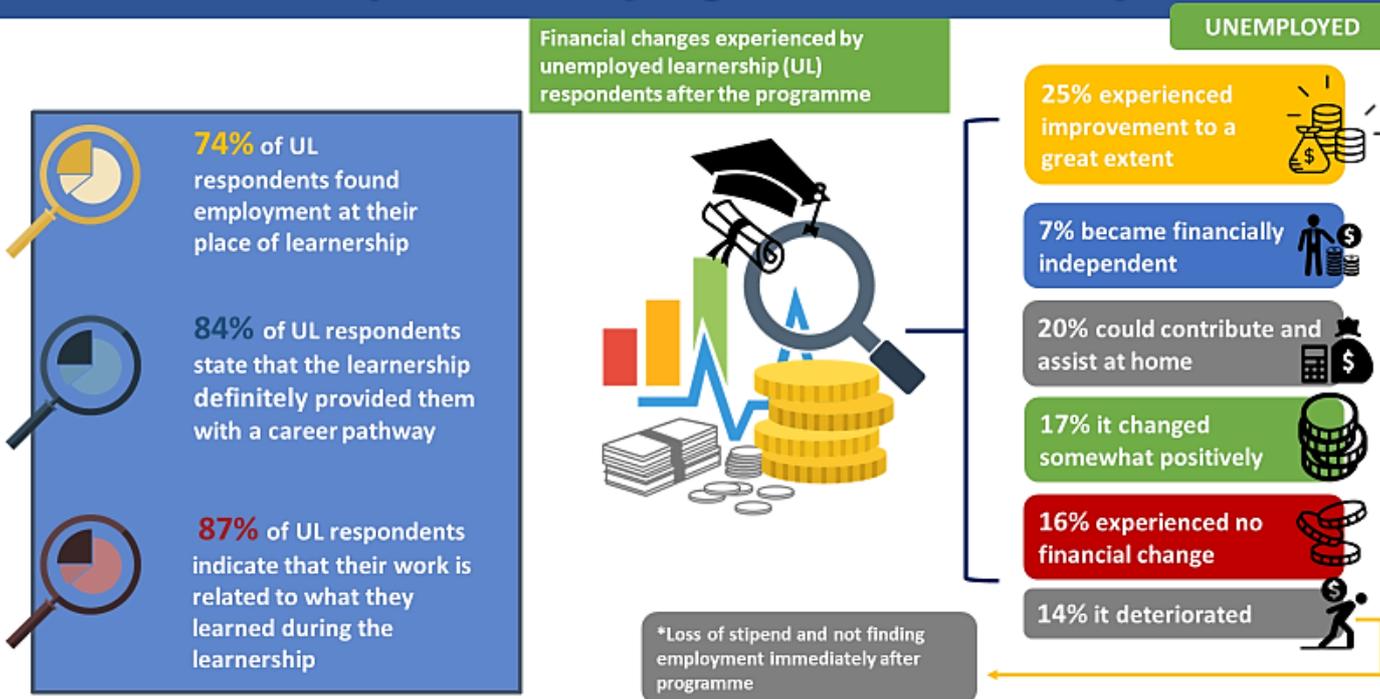


Figure 3-30 Did UL beneficiary find employment at place of learnership?

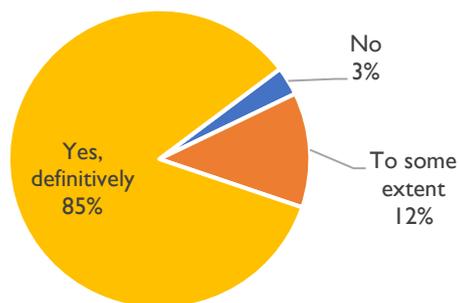


Figure 3-31 Did learnership provide UL beneficiary with a career pathway?

Among the unemployed learnership beneficiaries who participated in the 2016/17 learnership programme, 74% indicated that they found employment at their place of learnership. Old Mutual, Avbob Mutual Assurance Society, Hollard Life Assurance Society, Santam Insurance, MMI Holdings, and Discovery, amongst others, are some of the employers who hosted the unemployed learnership beneficiaries.

At least 85% of unemployed learnerships respondents positively indicated that the learnership provided them with a career pathway; 12% indicated that they were able to develop some extent of a career pathway, while 3% claimed that the learnership did not provide them with any career pathway.

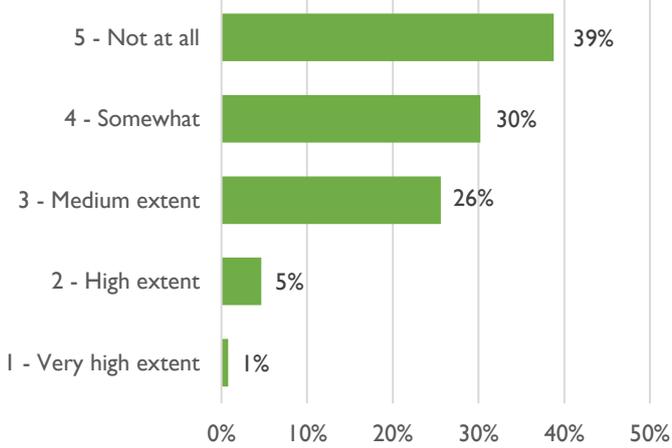


Figure 3-32 Career expectations realised at time of unemployed learnership (UL) completion

When asked to rate their workplace experiences in terms of the programme's impact, the responses were unsatisfactory among the group of unemployed learnership (UL) respondents. Most of the beneficiaries (39%) indicated that their career expectations were not realised at all at the time of completing the learnership programme, 30% were somewhat satisfied with the outcome of their career expectations at the end of the programme, and 26% were ambivalent. In comparison to those who were not entirely satisfied with the outcomes of their career expectations at the end of the learnership, a small minority of 6% indicated a high level of satisfaction.

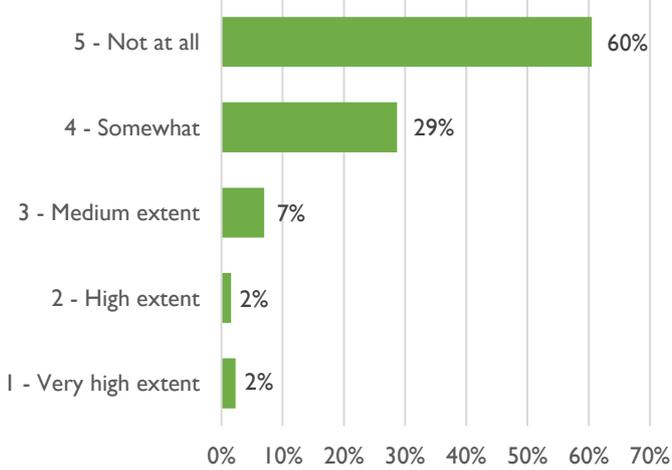


Figure 3-33 Current work tasks using knowledge and skills acquired through unemployed learnership (UL)

Although the respondents found that their work is related to the training they received, which makes sense since they are mostly employed in the Insurance industry, 60% of the UL respondents indicated that their current work tasks do not use the knowledge and skills acquired through the programme. Only a small minority of 4% indicated that the programme had a high level of impact on their current work tasks.

Perceived impact of the programme on EL respondents

EMPLOYED

Financial changes experienced by employed learnership (EL) respondents after the programme



9% experienced improvement to a great extent



12% greater financial independence/ quality of life



4% could contribute and assist at home



8% it changed somewhat positively



59% experienced no financial change



4% it deteriorated



- All the EL respondents indicated the learnership took place at their place of employment
- 79% of EL respondents state that the learnership definitely provided them with a career pathway
- 90% of EL respondents indicate that their work is related to what they learned during the learnership

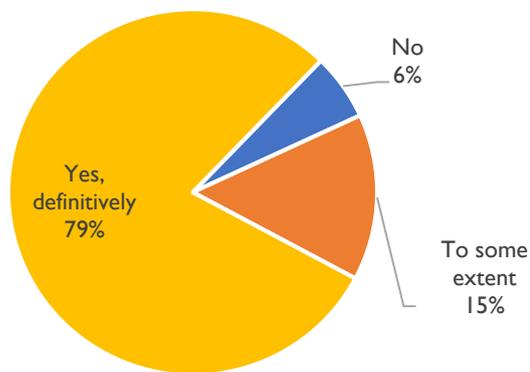


Figure 3-34 Did the learnership provide EL beneficiary with a career pathway?

For the employed learnerships beneficiaries, 100% of the 117 who responded indicated that they are employed where their learnership training took place. Some of the main employers for this group of respondents are Avbob Mutual Assurance Society, GEMS, Old Mutual, Sanlam Life Insurance, and Alexander Forbes.

At least 79% of employed learnerships respondents indicated that the learnership programme provided them with a career pathway; 15% indicated they were able to develop some extent of a career, while 6% of employed learnerships claimed that the programme did not provide them with a career pathway. This corresponds with the employment outcomes of beneficiaries who indicated that they did not achieve promotion or a salary increase upon completion of the programme in Section 3.4.2.

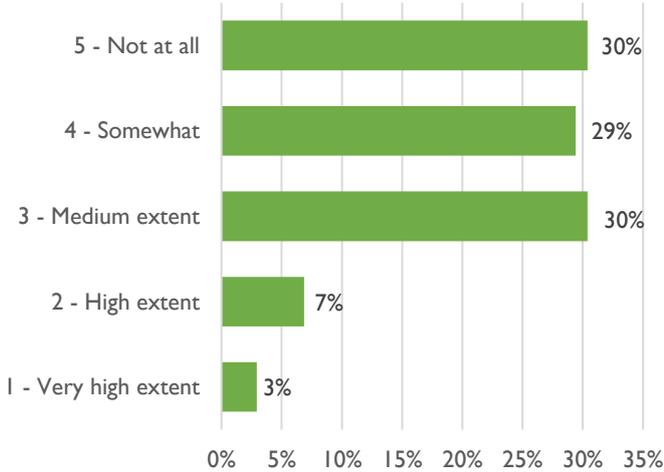


Figure 3-35 Career expectations realised at time of employed learnership (EL) completion

When asked to rate their workplace-based experiences in terms of the programme's impact, most of the employed learnership (EL) respondents indicated that their career expectations were not entirely realised at the time of completing the programme; 30% claimed that no impact was made, 29% were ambivalent, and 30% were somewhat satisfied with the outcome of their career expectations at the end of the programme. In comparison to the lower levels of satisfaction, a minority of a total of 10% indicated a high level of satisfaction.

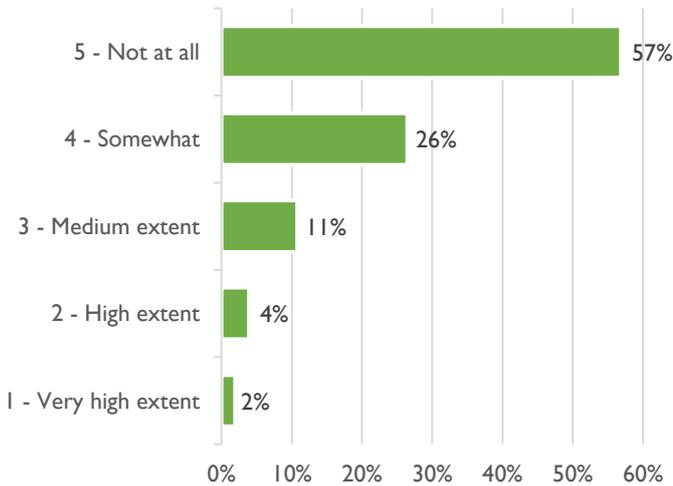
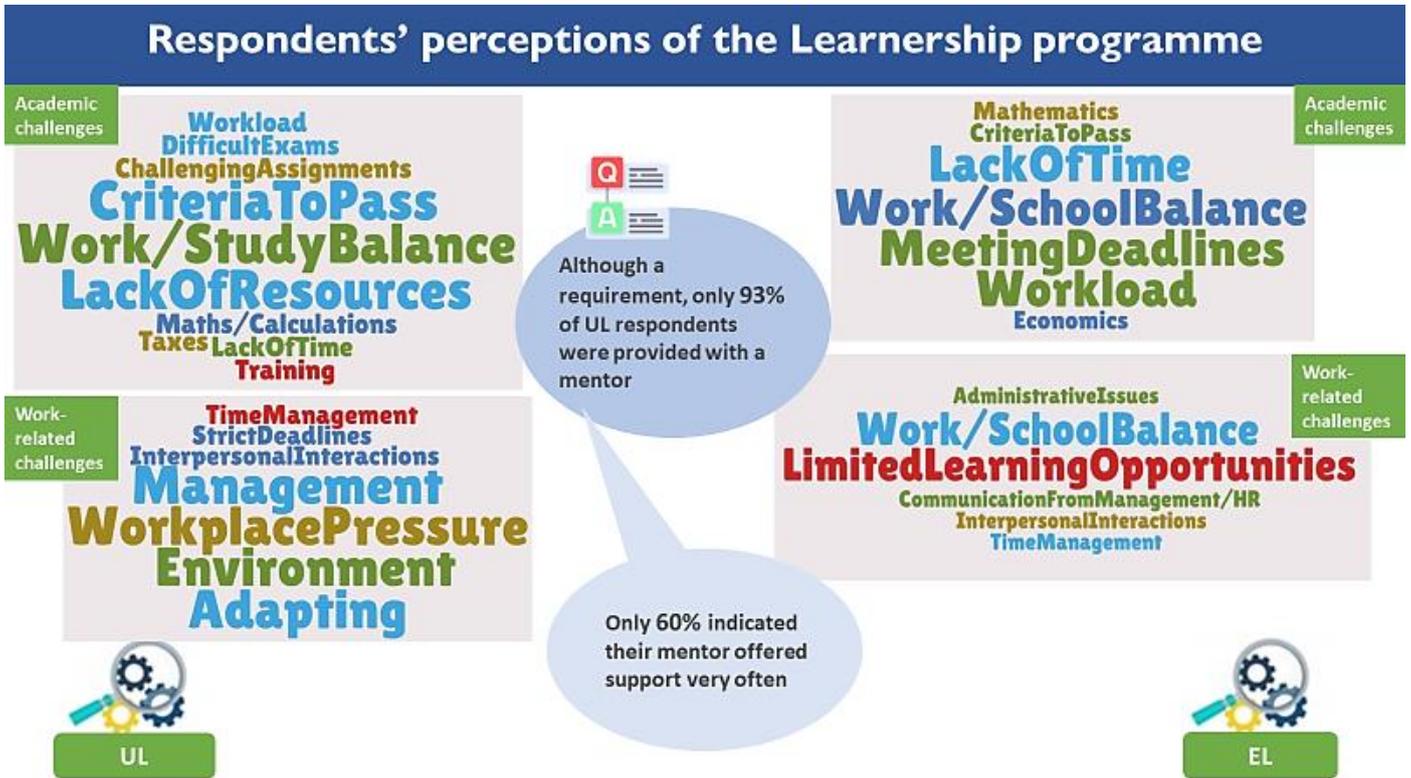


Figure 3-36 Current work tasks using knowledge and skills acquired through employed learnership (EL)

Similarly, nearly 60% of the EL respondents indicated that their current work tasks do not use the knowledge and skills acquired through the learnership programme. About 37% of the respondents indicated that there is somewhat of a relationship between what they are currently doing and what they learned through the programme. Again, a small minority of 6% indicated that the programme had a high extent of impact on their current work tasks.

3.4.5 Respondents’ perceptions of the learnership

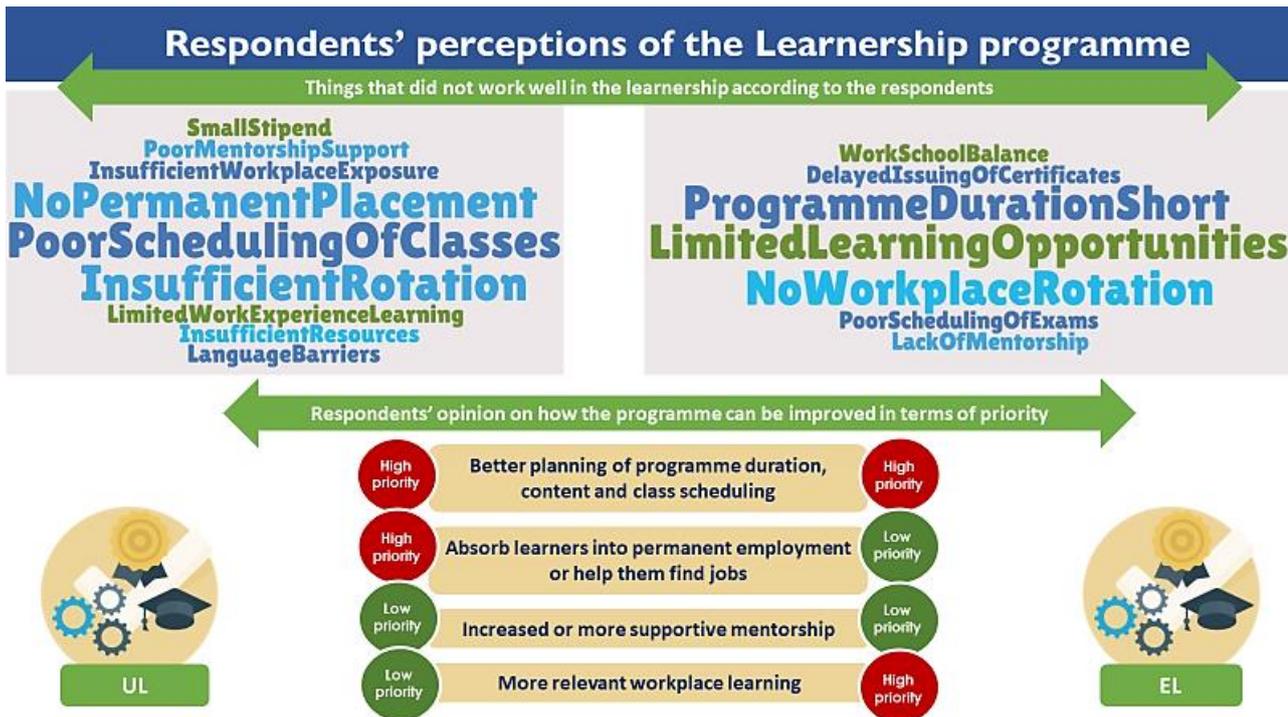
In this section, the respondents’ overall experiences under the learnership programme of the 2016/17 intervention period are outlined. Here we consider why the learners found the programme beneficial and why not; the section also looks at the mentoring and evaluation of learners’ performance throughout the programme, as well as the challenges they experienced. The respondents offered suggestions on how the learnership programme can be improved upon and insight is given into this area, too.



The diagram above depicts the challenges the respondents experienced during the learnership. Both groups experienced academic challenges related mostly to time management and balancing school and workplace training workloads. The UL group, however, cited issues with resources, the quality of training they received, and the duration in which they were expected to complete tasks.

In terms of work-related challenges, the UL group appear to have faced issues with the workplace environments they were in, as well as management-related challenges. Moreover, only 93% of UL respondents indicated they were provided with a mentor even though this is a requirement for this group of the programme. Only 60% indicated they had a mentor who offered consistent support. It can be inferred that lack of mentorship support impacted the UL respondents’ experiences during the workplace training as many of their issues here could have been alleviated with the support of a mentor.

The EL group, on the other hand, cited work/school balance and limited learning opportunities as their main work-related challenges. The latter could be because this group of learners were previously exposed to workplace experience and had higher expectations of the programme’s impact on their development in this area.



In addition to the challenges the learners experienced, they were asked about their general perceptions of the programme, what did not work well and what they suggested could be improved.

As illustrated in the diagram, both groups appear to have experienced a lack of relevant workplace learning. They observed that the opportunities to learn new skills were limited and they did not get a good amount of workplace exposure/rotation to other departments or work functions.

The respondents also found that the classes and exams were too closely scheduled, giving them little time to effectively prepare and take exams. The EL group particularly found the learning content lacking and not challenging enough. Moreover, both groups suggested that the duration of the programme can be extended so they can get more value out of it and feel less under pressure.

In terms of what the respondents feel could be improved about the programme, both groups placed priority on more accommodative programme planning and class schedules, as well as improved learning content. While the UL group prioritised being placed in employment, the EL group desired more opportunities at permanent employment opportunities.

4. Findings and recommendations

Based on the findings gained from the Learnerships learning programme survey results for the intervention period 2016/17, this section puts forward the key findings and recommendations for developing a sustainable skills development strategy for the Insurance SETA.

4.1 Key research findings

Based on the results of the tracer study conducted among learnership beneficiaries, the following key findings were identified:

Programme impact on beneficiaries



- The programme **effectively facilitates entry into employment** for UL beneficiaries.
- The programme **increases** chances of accessing employment and career advancement **opportunities for both** unemployed and employed learnerships.

- **Better employment outcomes are realised after the programme** — most respondents found employment within six months of completion, while they were unemployed for up to three years before the learnership.
- **Employment in the sector is relatively stable** — on average, 48% of UL respondents have been employed in the industry for at least two years.
- **The programme positively impacts financial situation of beneficiaries** — most UL respondents (69%) earn gross monthly incomes between R5 000 and R20 000; most EL respondents (59%) earn between R10 000 and R30 000.
- Overall, the programme appears to have improved the skills and knowledge of beneficiaries in the sector, with 84% of the respondents indicating that they learned more about the industry through the learnership. In some instances, the respondents stated that they found personal value and development through the programme, too.

4.2 Recommendations

The following recommendations are based on the preceding key findings and are applicable to all three learning programmes that were a part of the INSETA Tracer Study project.

1

On-going monitoring and evaluation



- Undertake rigorous **capturing and recordkeeping of beneficiary details** to support future studies:
 - At different points throughout the programme
 - Including additional/ alternative contact details (e.g. next of kin, e-mail addresses, etc.)
- Follow-up with beneficiaries at least once **during the funding cycle** to ensure their concerns are identified and addressed
- Conduct **annual impact studies or tracers** to assess the success rate of learning programmes on an ongoing basis
- Conduct **longitudinal tracing of beneficiaries** — tracing the same people over a longer period of time to assess long-term impact and sustainability of the programme
- Introduce an **alumni programme** where beneficiaries are provided with aftercare services:
 - To serve as **networking platform for beneficiaries**
 - To serve as **a hub of information** about beneficiaries' whereabouts

2

INSETA oversight and support



- Host **employer/ mentor orientation sessions** to guide mentors on:
 - Outcomes and objectives of the programme
 - Roles and expectations from mentors
- Utilise key findings from tracer studies to **review and assess** INSETA processes and programme coordination efforts, and **identify areas of improvement** with regard to:
 - Workplace readiness assessments (*where applicable*)
 - Record-keeping and reporting by employers
 - Mentor guidance
 - Training provider verification and quality assurance (*where applicable*)

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