



Learning and Career Pathways in the Insurance Sector

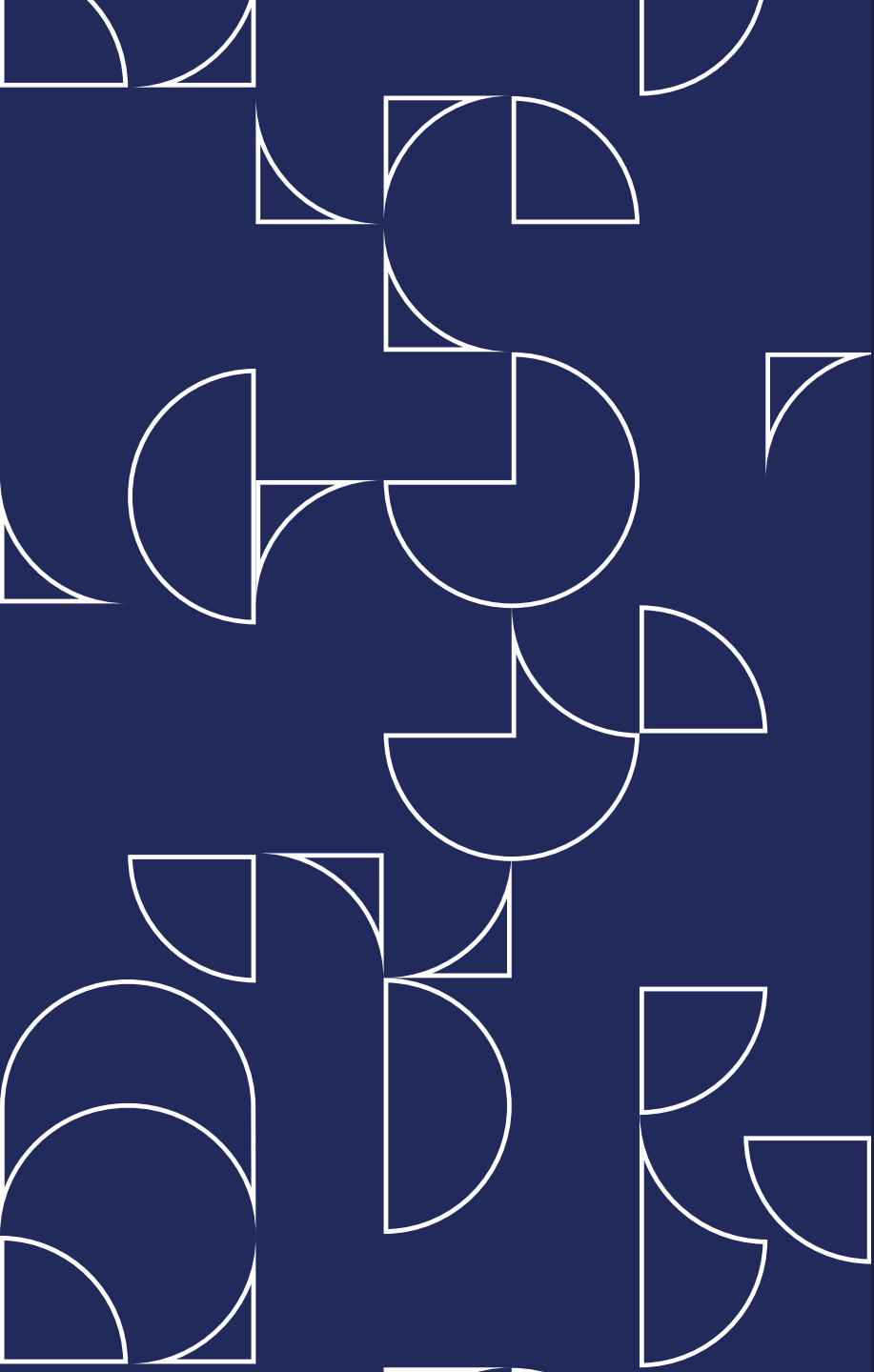
Finalising the Questionnaires

Development Policy Research Unit, University of Cape Town

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Outline

- Welcome and Introduction
- Background to the Research
- Overview of the Workshop
- Deep Dive into the Questionnaires
- The way Forward



Background to the Research

Background to the Research

- In order to function effectively and fulfil the demand for its services, the insurance sector requires appropriately skilled workers
- Skills shortages remain a critical challenge within the South African labour market
 - Neglect of education and training systems under apartheid manifests in persistent inequalities and bottlenecks in human capital accumulation
 - Capital- and skills-intensive structure of production inherited
 - Rapid technological change and skills-biased technical change

Background to the Research

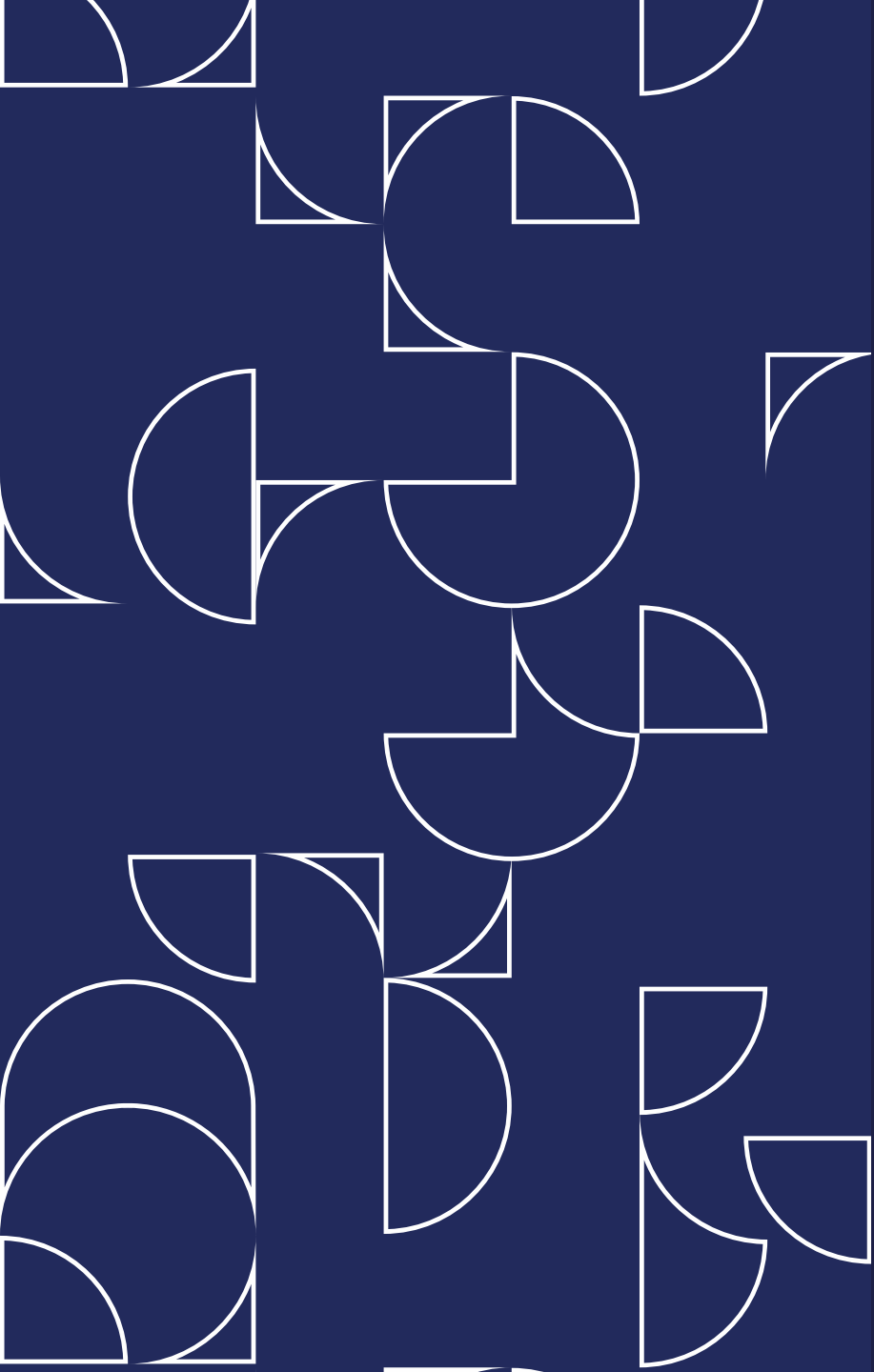
- At the same time, the sector grapples with ageing workforce
- In many contexts, insurance-specific knowledge accumulated over extended periods of time
- Combined with transformation imperatives, this contributes to challenges around skills transfer from older to younger cohorts ⇒ mentorship

	QLFS Data		WSP	Diff
	2019	2020	2020	
Total empl. ('000)	238	195	206	+11
Share (%)				
15-24 years	6.6	3.3
25-34 years	30.0	31.4
... 15-34 years	36.6	34.7	48.4	+13.7
35-44 years	34.4	36.4
45-54 years	20.3	23.2
... 35-54 years	54.7	59.6	44.5	-15.1
55-65 years	8.7	5.8	6.1	+0.3

Background to the Research

- Importance of succession planning increasingly recognised
- View these as interlinked issues that will receive attention over course of the research partnership
- As a first step, focus on learning and career pathways (this research)





The Proposed Research

The Proposed Research

- This research will focus on four occupations
- In essence, the research described below will be 'repeated' for each of the four occupations

INSETA's Top 10 Sectoral Priority Occupations

Insurance Agent ***

Actuary ***

Software Developer

Sales & Marketing Manager

Insurance Broker ***

Insurance Loss Adjuster

Financial Investment Advisor ***

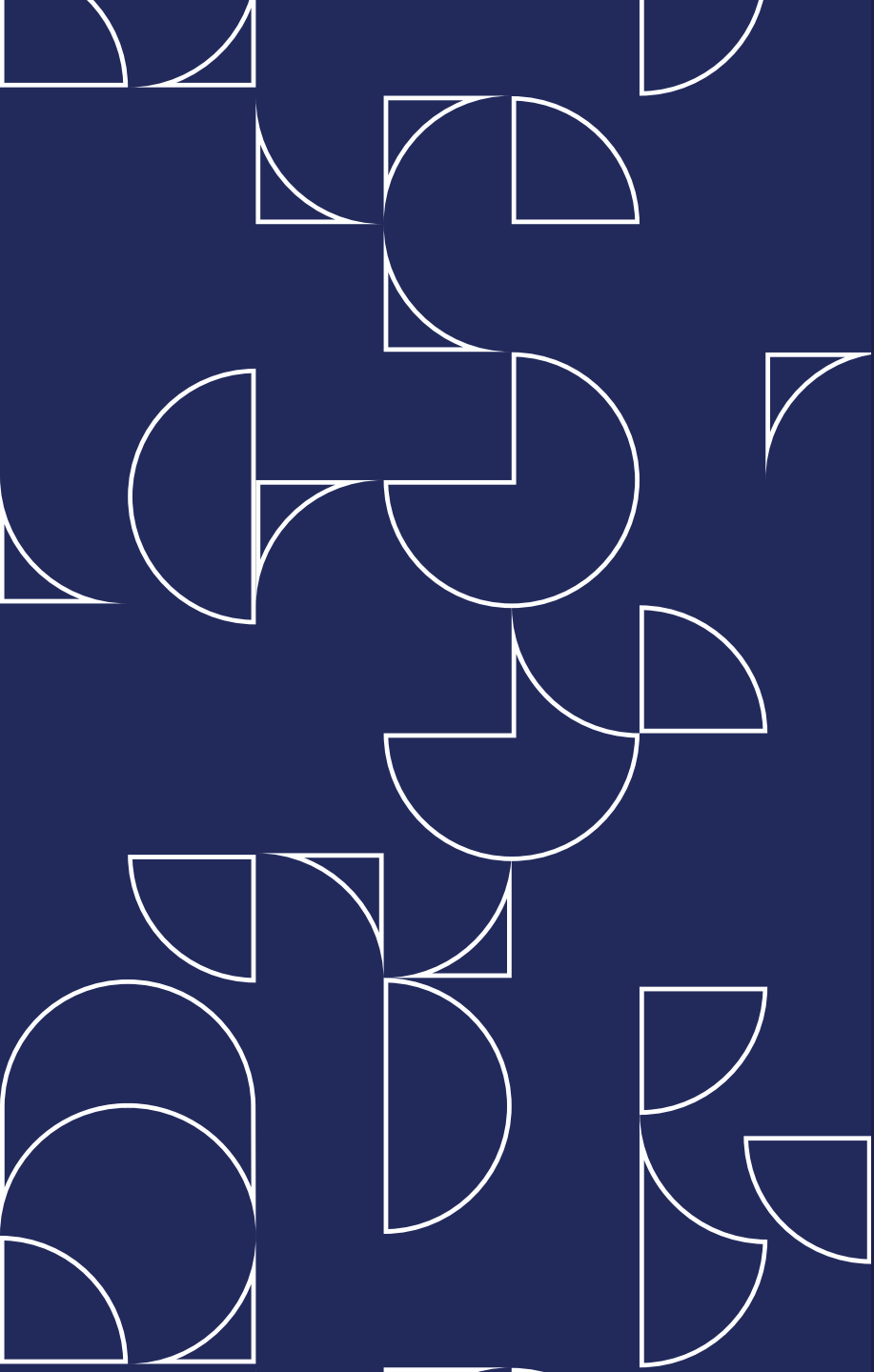
Compliance Officer ***

ICT Systems Analyst

Insurance Claims Administrator

Research Questions

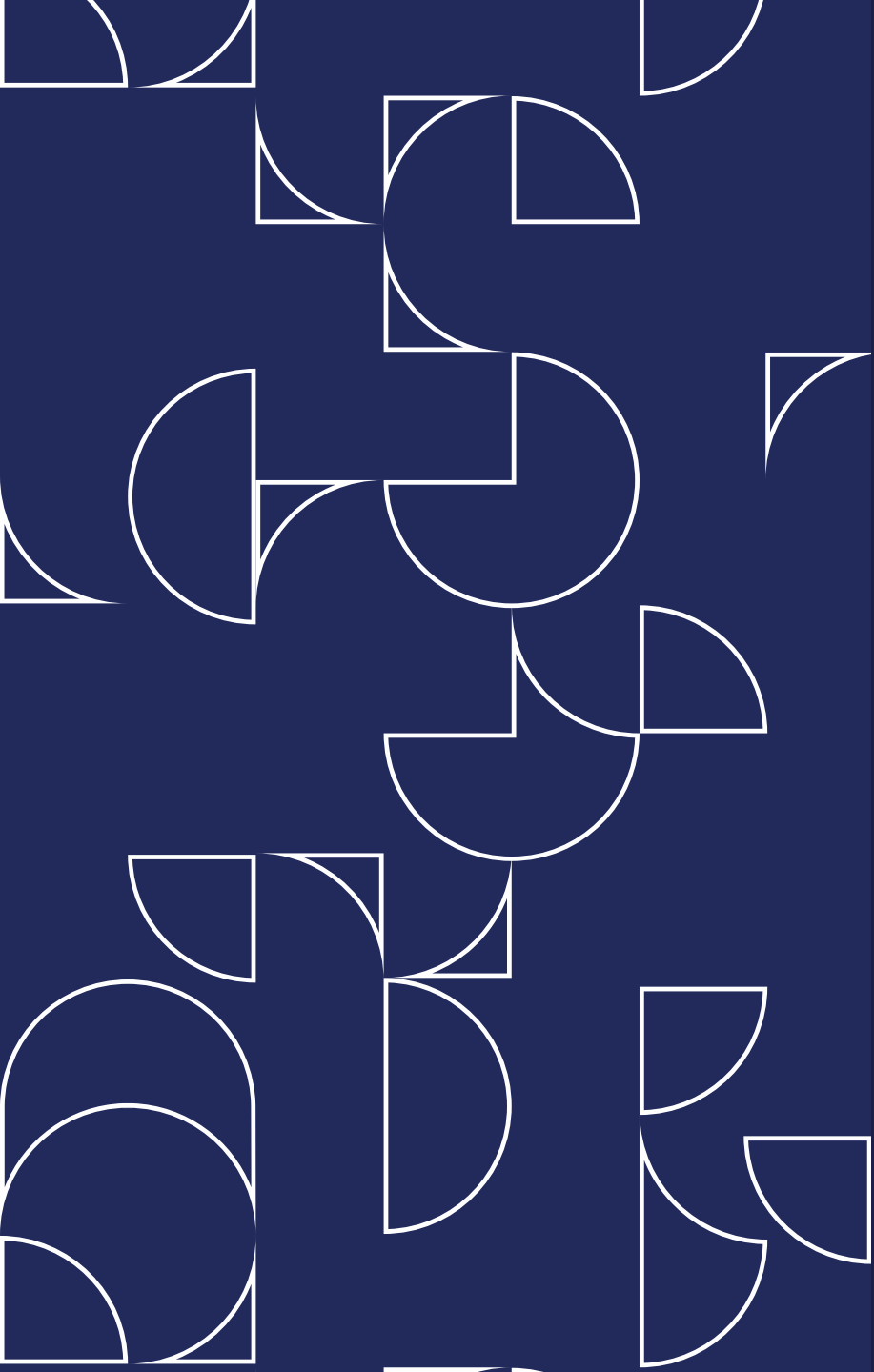
1. What are the key requirements, responsibilities, and necessary competences for each for the priority occupations? (“Occupational analysis”)
2. What are the available learning pathways that allow entry into each of these occupations, and which of these pathways are dominant? (“Learning pathways”)
3. What are the typical routes (career pathways/trajectories) followed into and out of each of these occupations? (“Career pathways”)
4. Given these learning and career pathways, what are the implications for meeting current and future demand for each of these occupations?



Overview of the Workshop

Workshop

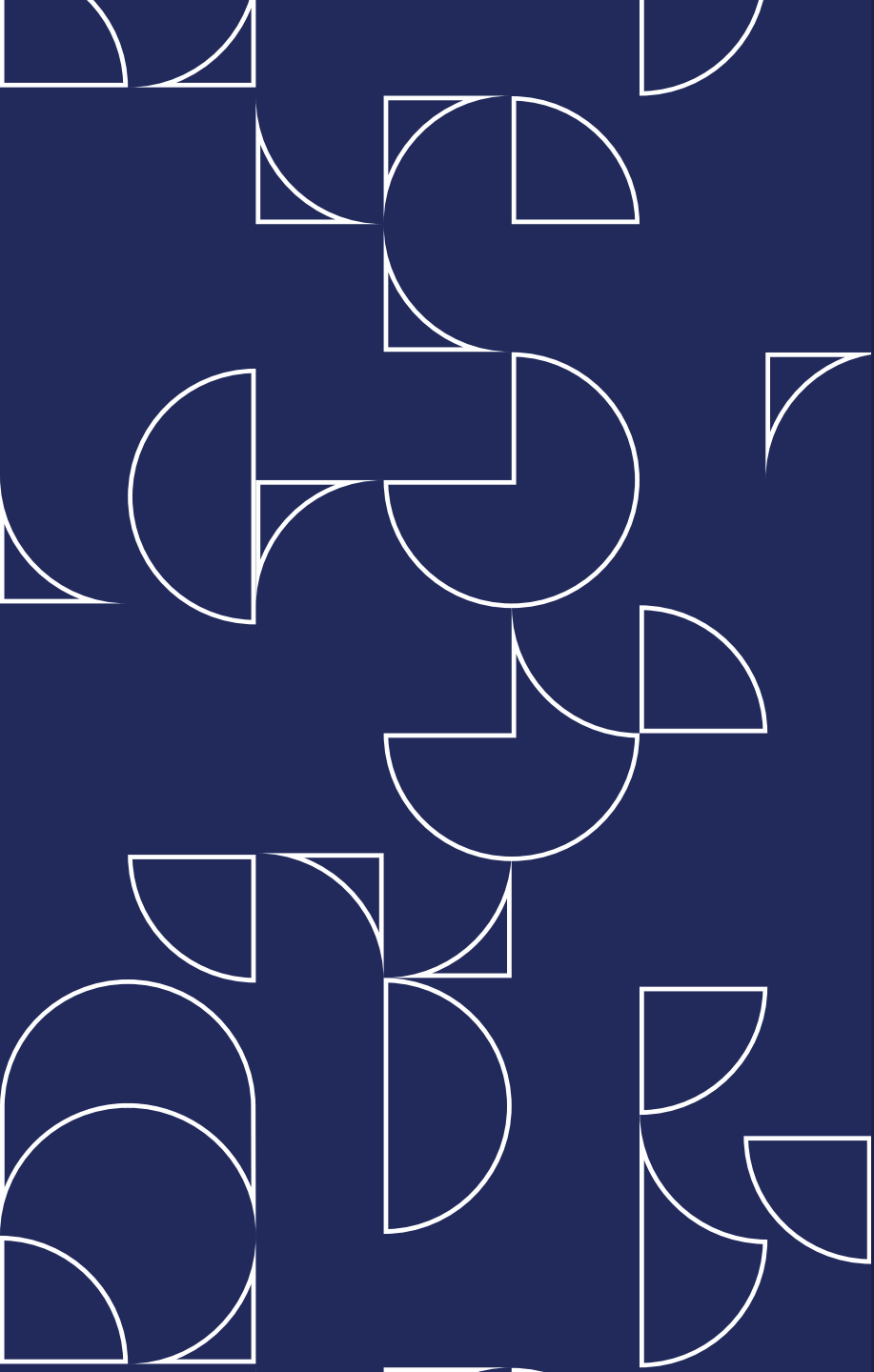
- The objective of this workshop is to discuss and fine-tune the questionnaires:
 1. The Employer Survey
 2. The Employee Survey
- The questionnaires were shared prior to this meeting
- We will use this opportunity to discuss the feedback



Deep Dive into the Questionnaire

The Survey Development

- Formulated questions in a way to obtain the relevant information
- Simplified the questionnaires to ensure that it is straightforward – multiple choice questions where possible (draft questionnaires)
- This will be an electronic survey
- Ethics clearance: mid August (questionnaire forms part of ethics)
- Pilot study: mid of August
- Data collection: end of August



Survey of Employers

1. Survey of Employers

- **Aim:** To collect relevant information with respect to the given occupation from employers in the insurance sector
- **Target:** Employers / business representatives / HR representatives
 - Use WSP data to only include in the sample employers who report employing at least one person in the given occupation
- The focus is on low-level positions as we are interested in determining the career and learning pathways
- There will be four versions of this survey – one for each occupation



1. Survey of Employers

- Electronic survey, collecting data on:
 - Employer details (link information to the WSP data)
 - Job and worker characteristics and requirements
 - Employment trends and expectations
- Examples will be included in the questionnaires to assist participants in answering the questions

Job and Worker Characteristics and Requirements:

Job titles

Career paths

Typical duties and responsibilities

Behavioural skills

Job specific technical knowledge

Vacancy fulfilment

Typical minimum requirements

Constraints in filling the vacancy

1. Survey of Employers

SURVEY OF EMPLOYERS

In this survey, we are interested in <<< *occupation* >>> (OFO code: 2019-xxxxxx). Unless specified otherwise, please note that the focus is on the lowest level position at which an employee can be considered to be a <<< *occupation* >>>.

A. EMPLOYER DETAILS

- | | | |
|----|--|-------------------------|
| A1 | <i>Legal name:</i> | [Legal Name] |
| A2 | <i>SDL Number:</i> | [SDL Number] |
| A3 | <i>Name of person completing the survey:</i> | [Contact Person Name] |
| A4 | <i>Email address:</i> | [Contact Email Address] |
-

1. Survey of Employers

B. JOB AND WORKER CHARACTERISTICS AND REQUIREMENTS

B1 *Within your organisation, what job titles and specialisations are associated with this occupation?*

Job title

Entry level

Specialisation

[Job title 1]

[Specialisation 1]

[Job title 2]

[Specialisation 2]

[Job title 3]

[Specialisation 3]

1. Survey of Employers

B. JOB AND WORKER CHARACTERISTICS AND REQUIREMENTS

B2 *Within your organisation, what career paths exist for an individual employed as <<< entry-level job title >>> that would not change their occupation from <<< occupation >>>.*

Example: From Junior Compliance Officer, to Compliance Officer, to Senior Compliance Officer.

From <<< entry-level job title >>>	to	[Job Title 1]
	to	[Job Title 2]
	to	[Job Title 3]

1. Survey of Employers

B. JOB AND WORKER CHARACTERISTICS AND REQUIREMENTS

B3 *What are the typical duties and responsibilities expected from someone in
<<< entry-level job title >>>?*

[Duty/Responsibility 1]

[Duty/Responsibility 2]

[Duty/Responsibility 3]

1. Survey of Employers

B. JOB AND WORKER CHARACTERISTICS AND REQUIREMENTS

B4 *What behavioural skills are necessary for someone to be successful as a <<< entry-level job title >>>?*

- Adaptability
- Cognitive thinking
- Collaborative approaches
- Communication
- Creativity
- Critical thinking
- Data analytics
- Decisiveness
- Design thinking
- Digital literacy
- Emotional intelligence
- Innovation
- Problem solving
- Systems thinking
- [Specified other]

1. Survey of Employers

B. JOB AND WORKER CHARACTERISTICS AND REQUIREMENTS

B5 *What job-specific technical knowledge do employees need to fulfill their responsibilities as a <<< entry-level job title >>>?*

[Technical Knowledge 1]

[Technical Knowledge 2]

[Technical Knowledge 3]

1. Survey of Employers

B. JOB AND WORKER CHARACTERISTICS AND REQUIREMENTS

B6

Over the past three years, when your organisation has recruited for this position, how long has it typically taken to fill the <<< entry-level job title >>>? (Please include all the time from when the recruitment process is deemed to have formally started, to the time when the successful applicant starts in the position).

[Time to Fill Vacancy]

1. Survey of Employers

B. JOB AND WORKER CHARACTERISTICS AND REQUIREMENTS

B7 *When your organisation recruits for <<< entry-level job title >>>, what are the typical minimum requirements in terms of:*

B7.1 *Years of relevant work experience?*

[Min. Years]

B7.2 *Qualifications?*

[Qualification 1]

[NQF Level 1]

[Qualification 2]

[NQF Level 2]

[Qualification 3]

[NQF Level 3]

B7.3 *Professional licence(s)?*

<<< Option >>>

<<< Option >>>

Other, please specify: [Specified other]

1. Survey of Employers

B. JOB AND WORKER CHARACTERISTICS AND REQUIREMENTS

B8 *When recruiting <<< entry-level job title >>>s over the past three years, what have been the top three constraints in terms of filling the position?*

- Applicants lack necessary educational qualifications for the position
- Applicants lack appropriate work experience for the position
- Applicants lack appropriate professional licence(s)
- Applicants lack appropriate job-specific technical knowledge
- Offers of employment are turned down because of the level of remuneration
- Offers of employment are turned down because of the location of the position
- Other, please specify: [Other 1]
- Other, please specify: [Other 2]

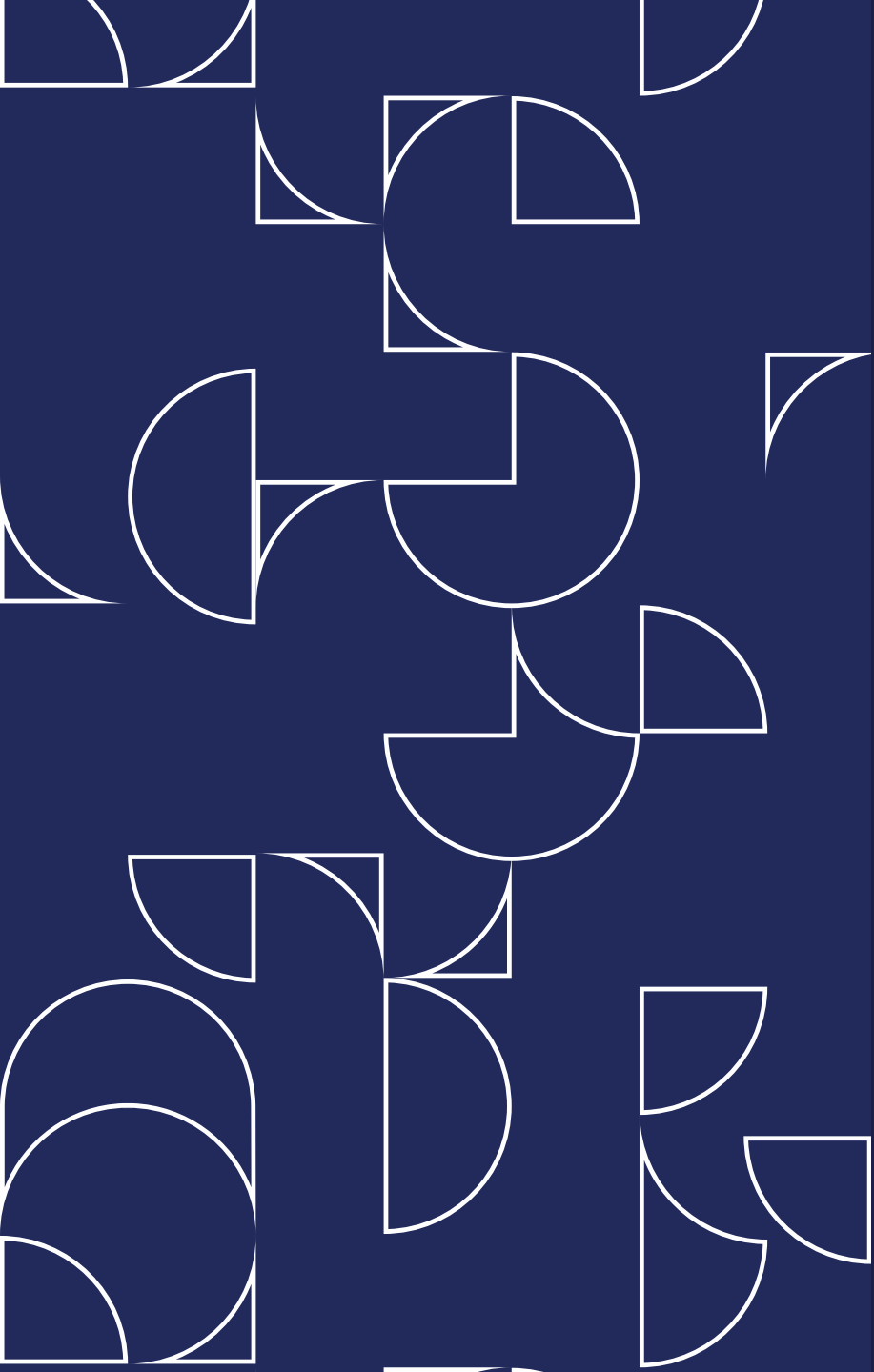
1. Survey of Employers

C. EMPLOYMENT TRENDS AND EXPECTATIONS

C1	<i>At the end of each calendar year:</i>	2018	2019	2020
C1.1	How many positions did your organisation have for <<< entry-level job title >>>?	[Positions_2018]	[Positions_2019]	[Positions_2020]
C1.2	How many individuals were employed as <<< entry-level job title >>>?	[Employed_2018]	[Employed_2019]	[Employed_2020]
		2021	2022	2023
C2	How many positions does your organisation anticipate having available for <<< entry-level job title >>> in the future?	[Positions_2021]	[Positions_2022]	[Positions_2023]

Considerations for the Employer Survey

- Strategies to get firms to respond to the questionnaire?
- Coverage by firm size, subsector, location? Other dimensions to ensure representation?
- Educational institutions commonly associated with the required qualifications?



Survey of Employees

2. Survey of Employees

- **Aim: To collect information on career histories from employees**
- Target: Employees in the focus occupations
 - Again, targeting workers through WSP data, where employers report employing at least one individual in the given occupation
- We are only interested in individuals who are currently employed and who are relatively recent entrants
- Collecting information that is in CVs
- Objective is to keep this survey as simple as possible

2. Survey of Employees

- Electronic survey, collecting data on:
 - Screening questions
 - Current employment
 - Qualifications and specialisations
 - Employment history
 - Demographic information
- Again, we will include examples to assist participants in answering



2. Survey of Employees

SURVEY OF <<< OCCUPATION >>>

In this survey, we are interested in understanding the <<< occupation >>> occupation and the educational and career paths that individuals follow as they become << occupation >>. Much of the information that is requested here would be information that would be listed on your CV.

SCREENING QUESTIONS

Are you currently employed as <<< occupation >>> within the insurance sector?

Yes

No

Did you first start working as a <<< occupation >>> prior to 2000, whether in the insurance sector or any other sector?

Yes, I started prior to 2000

No, I started in or after 2000

2. Survey of Employees

A. CURRENT EMPLOYMENT

- | | | |
|----|---|-------------|
| A1 | <i>What is your current job title?</i> | [Job Title] |
| A2 | <i>How many employees work for your employer?</i> | [Firm Size] |
| A3 | <i>In what sector does your employer operate?</i> | [Sector] |

2. Survey of Employees

B. QUALIFICATIONS

B1 *Please list the qualifications and specialisations that you have completed successfully.*

Qualification	Specialisation	NQF Level	Year Completed
[Qualification 1]	[Specialisation 1]	[NQF Level 1]	[Completion Year 1]
[Qualification 2]	[Specialisation 2]	[NQF Level 2]	[Completion Year 2]
[Qualification 3]	[Specialisation 3]	[NQF Level 3]	[Completion Year 3]

2. Survey of Employees

C. EMPLOYMENT HISTORIES

C1 *Please provide details of your employment history since you first started working.*

Start Year	End Year	Employment Status	Job Title	Employed as <<< occupation >>>	Where was your place of work?	In your view, relative to your previous job did this job represent:	Was this job at a different employer to your previous job?	Was your employer part of the insurance sector ?
[Start Year]	[End Year]	[Status]	[Job Title 1]	[Occupation]	[Place]	[Move]	[Changed Employer]	[Insurance Sector]
[Start Year]	[End Year]	[Status]	[Job Title 2]	[Occupation]	[Place]	[Move]	[Changed Employer]	[Insurance Sector]
[Start Year]	[End Year]	[Status]	[Job Title 3]	[Occupation]	[Place]	[Move]	[Changed Employer]	[Insurance Sector]

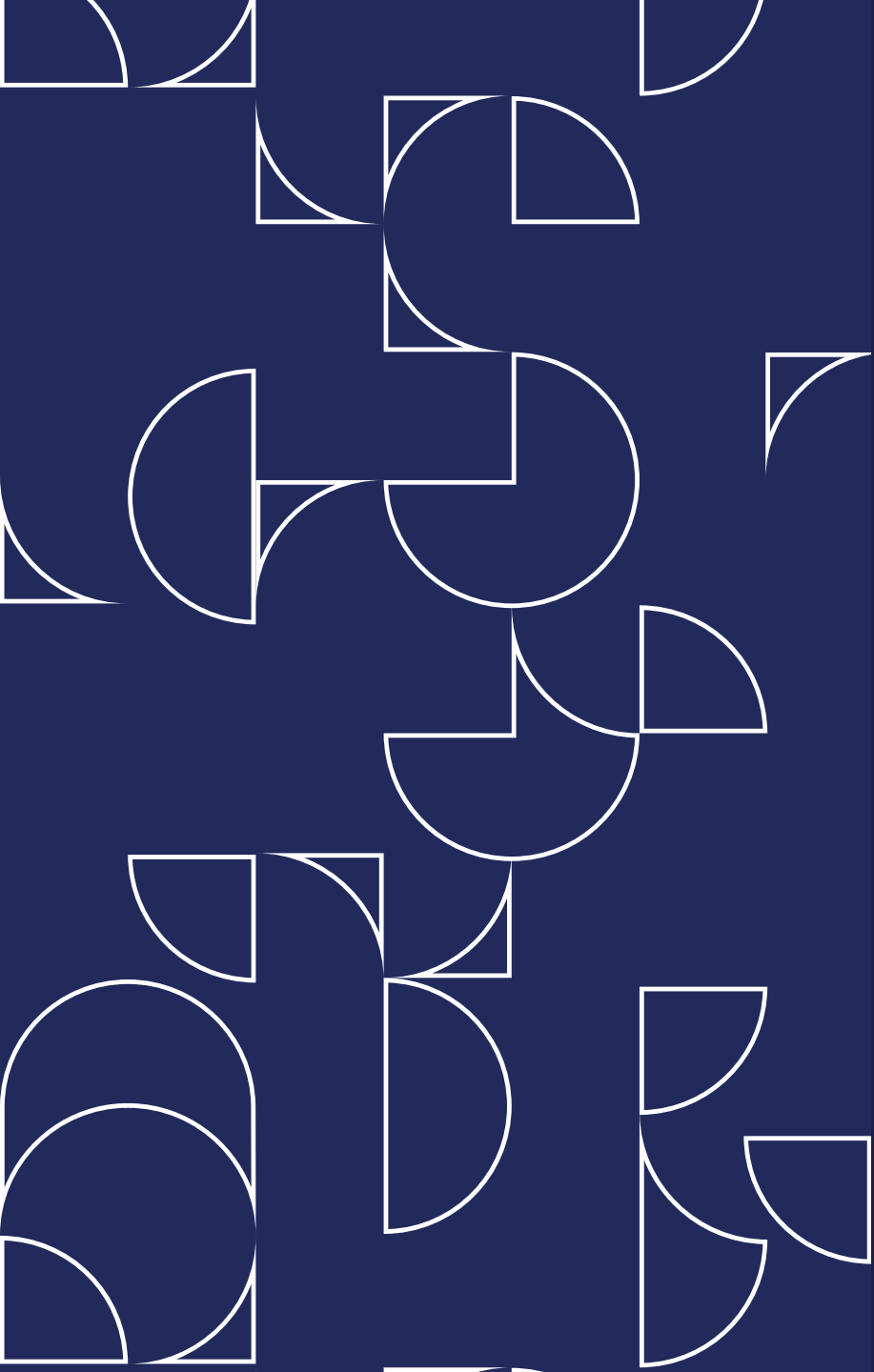
2. Survey of Employees

D. DEMOGRAPHIC INFORMATION

D1	<i>Gender</i>	[Gender]
D2	<i>Current Age</i>	[Current Age]
D3	<i>Race</i>	[Race]

Considerations for the Employee Survey

- Strategies to get employees to respond to the questionnaire? An incentive?



Way forward

Next Steps

- Finalise the questionnaires based on the feedback received today
- Submit feedback / queries to the team via email by the 14th of July
- Ethics clearance by mid August
- Identify employers/employees to approach for participation using WSP submissions from this year
- Pilot the questionnaires
- Data collection end of August

Thank you

