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INSURANCE SECTOR EDUCATION
AND TRAINING AUTHORITY

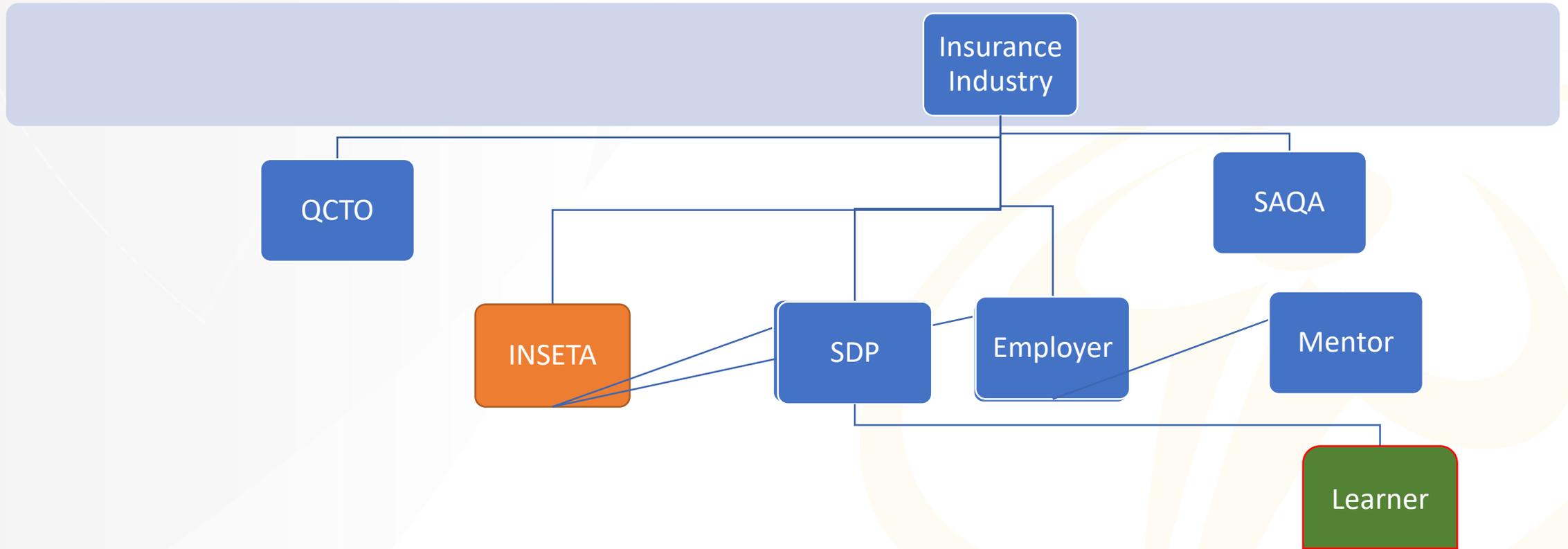
Learnerships and Logbooks

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Name of Presenter: ETQA Specialist

Division: ETQA

Role Players



Why a Learnership?

Learnership:

A Linkage between structured learning and work experience:

- ① theoretical knowledge and
- ② workplace experience/exposure leading to a qualification registered on the NQF.

Logbook: Used to -

- Provide some structure to the workplace experience component of the Learnership.
- Focus the workplace experience component linked to the ELOs of the Qualification.
- Record evidence/proof of natural occurring workplace experience under the 'eye' of a mentor/line manager/subject matter expert.

Selecting a Learner for a Learnership?

When Selecting People to join a Learnership, it is important to find the right person.

Employers can select Learners from currently employed personnel, as well as unemployed people and pre-employed learners.

Training Providers should participate in the recruitment and selection process as they have the ability to select appropriate candidates for the level

Selecting a Learner for a Learnership?

Some criteria to consider when selecting learners:

Entry level skills and qualifications should meet the demands of the learnership.

Suitability for the occupation they will be learning towards.

A learner's reasons for participating in the learnership.

- Dedication
 - Motivation
 - Passion to improve their lives
 - Etc.
-
- Conduct a Learnership Interview with potential learners will assist you to identify the reasons.
 - They will be joining your Organisation and just like any other position, the Employer needs to interview the potential Learners.

Learnership Interview

Some Questions the Employer and SDP may consider during the interview to make sure you have the right candidate to enrol:

Tell us why we should consider you for this Learnership?

Why do you want to enter this learnership programme?

What skills do you have that makes you a good candidate for this learnership?

What are your strengths and weaknesses?

What are your Long-term Career Goals?

What kind of Work Environment do you strive in?

How do you manage your time effectively?

How do you handle Constructive Feedback and Criticism?

ETC..

Five Things To Note About Learnerships BEFORE You Get Started

- A Learnership is more than (just) a Qualification plus a Logbook
- Learners have achieved a Learnership only if they have the ‘Theory **AND** Logbook’
- When INSETA or another SETA funds Learnerships, the throughput rate is measured as No. of Learners Enrolled/No. of Learners Achieving the Learnership (not just the Qualification).
- The Employer may have accessed funding through another SETA to offer a INSETA Qualification. This learnership will be verified by the INSETA however the funding will come from the SETA where the Employer is registered. E.g. BankSETA
- Not all workplaces (for the workplace experience component of a Learnership) have the same environment. Simulations and Workshops by a SME can be considered to enable learners to have exposure to other relevant Insurance Fields to meet the Qualification Exit Level Outcomes.

Important lessons from SDPs with an excellent Learnership track record.

- Work as a skills development *partner* with the employer/s.
Partnerships between SDPs and Employers are very important. Not just for Learnerships but also for Occupational Qualifications registered by QCTO.
- Start with the end (Verification → Certification) in mind. Remembering that the Learnership Certificate also indicates that a Learner has experience and not just the knowledge component.
- Take initiative with the workplace experience component of the Learnership, including the Logbook.

SDP Project Representative should schedule Monthly / Bi-Monthly Meetings with the Workplace Mentors to follow up, monitor the progress and provide guidance.

Important lessons from SDPs with an excellent Learnership track record.

- Know your learners; act as soon as you become aware of a problem; plan how to get back on track if the Learnership goes off the roll-out plan.

Your Facilitators and Workplace Mentors are in the best position to identify any Special Needs, Learning Difficulties, Personal Issues and need to alert you of these so early action can be taken to assist, guide, coach the Learners to ensure a better success rate and Learning Experience.

- SDP to record the LGA Number / Funding Number from the Learnership Agreement for Record Keeping and Reporting.

Learnership Workplace Experience Logbook (Logbook for short)

- Identifies Functions, tasks, activities, practices etc. relevant to the exit level outcomes (ELOs) of the qualification to be done in a workplace/s.
- Assessors and Human Resources need to meet and discuss these and record possible Functions the learners will perform against a Job Description and the evidence that will be naturally created in each function.
- Provides:
 - A record of workplace experience/exposure.
 - Evidence of tasks performed.
 - A reference guide for future use.

Benefits / Consequences

Learners

- ✓ On the Job Training (Practical Learning)
- ✓ Learn while you earn (Theoretical Learning)
- ✓ Improve existing skills and develop additional ones
- ✓ Get Experience whilst earning a Qualification
- ✓ Build Connections
- ✓ Achieve a Nationally Recognized Qualificaton

- No Qualification can affect employment Opportunities
- No Experience can affect employment opportunities

Employers

- ✓ Access to a wider pool of appropriately skilled and qualified employees
- ✓ Increased return of investment
- ✓ Tax Rebates from Sars
- ✓ Increased of productive workforce at minimal / no cost to the employer for a salary
- ✓ Productivity could increase because of higher skilled workers
- ✓ Satisfied and Motivated Workforce due to investment in their development

- If not completed, employer has to refund Seta.
- Future Funding may be affected if not committed
- Low Morale Rate is workforce feels unappreciated

Benefits / Consequences

The industry	SDP
<ul style="list-style-type: none">✓ Employees obtain a qualification and meets this DOFA requirement on being employed✓ Qualified and Experienced employees○ Needs to appoint a learners and start afresh with up skilling the learner to be able to perform the work○ Supervision Periods may be longer	<ul style="list-style-type: none">✓ Higher Throughput Rate = Better Industry Footprint✓ Marketable○ Low Throughput Rate may make employers hesitate to appoint the SDP for Training Component or to Consider appointing Learners from that SDP

The Logbook and the SDP

Employer is **Responsible** But SDP is **Accountable**

- Be an effective Skills Development Partner – train or induct mentors; suggest workplace activities; advise on a workplace rotation plan (and/or mentor rotation);
 - Use the Latest Version of the Logbook Template (comes with Instructions)
- Note that Learnership Verification includes Logbooks – quality matters, all around.
- **SDPs must report any challenges / reasons in the event that Logbooks cannot be presented at verifications and a plan to overcome these.**
- These needs to be reflected in the Assessor Report for every Learners that does not have a Logbook.

Mentors

- Mentors are a vital resource to ensure the success of the Learnership and Logbook component.
- A mentor in the workplace is someone who is capable of providing guidance to a less-experienced employee, the mentee.
- Mentorship role should be added to a Mentors KPA to enable buy-in and responsibility.
- INSETA Learnership Guidelines for Workers indicates that “Employers must adhere to a ratio of 1 mentor to every 3 learners however, for small employers, this does not guarantee that a minimum of 3 learners will be allocated.” as part of the approval principles.

Mentors Role

- Ensure Learners understand the process and what is required of them
- Ensure that Learners have access to the necessary resources
- Be available to assist Learners with their assignments and Logbooks
- Provide feedback and agree on an action plan if Learners have not met the criteria during a workplace assessment
- Provide Learners with the necessary coaching to help them meet the criteria
- Help Learners solve any difficulties that may arise during the learning process

Last but not least, excellent SDPs . . .

- Develop a Workplace Experience/Exposure policy and procedure (including induction, guidance and support of Mentors)
- Mentors Induction Guideline to be supplied and Induction Session to be conducted. Schedule within the Roll Out Plan.
- Reinforce quality assurance of workplace experience/exposure/simulations to promote learner employability after the Learnership.
- Encourage continuous Employer/Mentor discussions and monitoring of learner progress.
- Submit Logbook in Quarters to ensure Learners is on track.
- Focus on whatever they can do to increase learner retention on the Learnership (*low throughput rates become fruitless and wasteful expenditure*)

Throughput Rate

- Calculating a Learnership Throughput Rate:

Total Number of Learners who are Fully Competent with a Acceptable Logbook
Divided by the Total Number of Learners Registered on the Learnership

Eg: Total Number of Registered Learners on LGA = 10
Total Number of Learners competent (with Logbook) = 3
Total Number of Learners competent (without Logbook) = 7
Throughput = 30%

It is in the SDPs best interest to have a high Throughput Rate.
Low Throughput rate are a Red Flag for a SETA and QCTO.

Rotation / Simulations

- Rotation plan to be discuss and implemented where the learners has exposure to other departments in order to meet the Qualification ELO.
- Simulations can be arranged with a SME to do a presentation on a specific field to enable learner to obtain exposure to a field that is not part of their environment.
Evidence: Attendance Register, Presentation, Workbook, etc.
- All Exit Level Outcomes (ELO) of the Qualification needs to be proven in the Logbook.
- Minimum 6 months natural occurring evidence required to be accepted.

Logbook Template

•General Information

Employer/Company Name	
Skills Development Provider (SDP) Name	
SDP Contact Number	
Learner First Name and Surname	
Learner Contact Number	
Learner Email Address	
Learner ID Number	
Qualification Title	
Qualification ID Number	
Learnership LGA Number	
Mentor First Name and Surname	
Mentor Job Title	
Mentor Contact Number	
Mentor Email Address	

Logbook Template

•Overview/Summary of the Workplace Experience Per Exit Level Outcome

Qualification's Exit Level Outcomes	Brief description/summary of the evidence submitted	The Mentor signs-off when learner's evidence is of a satisfactory standard.	
Exit Level Outcome 1:			
Topics/Tasks		Mentor Signature	Date
1.			
1.			
1.			
1.			
1.			
1.			
1.			

Logbook Evidence (Example)

Exit Level Outcomes of the Qualification (eg SAQA ID 49929):

- 1. Carrying out basic research tasks and applying literacy and numeracy skills to analyse, interpret and evaluate information from a range of sources related to Short Term Insurance or reInsurance.
 - Call Centre Script
 - Emails to Clients (Cross out Client Information)
 - Quotations
 - Proposals
- 2. Managing personal finances.
 - Personal Budget
 - Tax Consultant Presentation

Logbook Evidence

Exit Level Outcomes of the Qualification (eg SAQA ID 49929):

3. Apply knowledge of legislation, ethics, compliance and organisational protocols in the Short Term Insurance environment.

- Employer Code of Conduct
- Employer Product Training

4. Manage own work situation and interpersonal interaction

- Call tracking / Log sheet
- Performance Management Conducted
- Meetings attended

Logbook evidence is not a extra It is evidence that is generated naturally whilst working. We would love to hear your inputs on how to make the Logbook Fun.....

Logbook Evidence (Example)

Exit Level Outcomes of the Qualification (eg SAQA ID 57608):

- 1. Gathering, analysing, synthesising and evaluating information, manipulating and interpreting data and identifying trends, communicating information coherently in writing and verbally, and showing insight into current affairs in the Financial Services sector.
 - Proposals
 - Emails
 - Statistics and other relevant information gathered
 - Quotations
 - Policy Wording

Logbook Evidence (Example)

Exit Level Outcomes of the Qualification (eg SAQA ID 57608):

2. Apply knowledge of economics, investment practices, tax and other financial information to match the needs of clients to financial products.

- Needs Analysis
- Tax Benefits linked to the Product

3. Applying knowledge of legislation, ethics, and compliance in the context of the financial services sector in South Africa.

- Employer Code of Conduct
- Employer Product Training

These are only examples but not a full list of evidence that may be considered as Natural Occurring Evidence.

**Your Understanding and
Feedback is important to us**





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I THANK YOU