

# EXPRESSION OF INTEREST



**inseta**  
INSURANCE SECTOR EDUCATION  
AND TRAINING AUTHORITY

EMPOWERED TO **INFLUENCE** AND **INSPIRE!**



## APPOINTMENT OF PUBLIC HIGHER EDUCATION INSTITUTION (UNIVERSITY) TO IMPLEMENT A POST GRADUATE DIPLOMA IN FINANCIAL PLANNING WITHIN THE FINANCIAL YEAR OF 24/25

### 1. BACKGROUND



INSETA will be implementing an accelerated Female Graduate Development Programme for the period of 2 years. The Graduate Development Programme objective is to attract, retain and build female Financial Planners/advisors for the insurance sector. This programme will create a pipeline for future leaders in the field of Financial Planners in the insurance sector.

The programme is aimed at upskilling and reskilling the female graduates in the different streams with potential of being the certified financial planners. The programme will provide the graduate with the qualification as well the experiential training that is aligning with the current business practices that will enable the to be competitiveness in the sector.

### 2. PURPOSE

INSETA intends to appoint one (1) accredited Business School or a Higher Learning Institution (only Public) to deliver the Post-Graduate Diploma in Financial Planning. The programme is for a period of 12 months for the identified twenty (25) candidates who are residing in the Gauteng and the Western Cape Province.

The programme must not commence later than the **15th of July 2024**.

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### 3. OBJECTIVE OF THE PROGRAMME

The programme is aimed at upskilling and reskilling the graduates who have already acquired an NQF L7 qualification in the below mentioned streams and that are currently doing an internship programme with companies in the insurance sector.

The focus of this programme is on the graduates with the following qualifications and who will be trained to become the financial planners in the insurance sector:

- **Financial Management,**
- **Risk and Compliance**
- **Sales Marketing**

### 4. SCOPE OF WORK

The PHEI/ provider responsibilities shall be measured against the following:

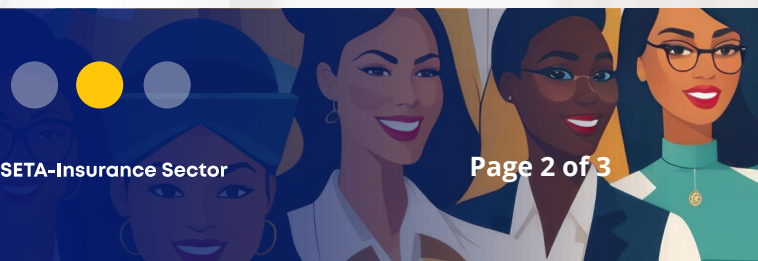
- 4.1 Facilitate and deliver the Post-Graduate Diploma in Financial Planning to 25 delegates within a period of 12 months.
- 4.2 To facilitate and co-ordinate all the training and administration activities for the Post-graduate Diploma in Financial Planning qualification.
- 4.3 To organise lectures, training and workshops needed according to the submitted timetable as agreed with INSETA.
- 4.4 Candidates must write the Final Board Exam on completion of the training component.
- 4.5 Must be able to conduct assessment/exams in the Western Cape and Gauteng
- 4.6 Ensuring partnerships and collaboration with the involved stakeholders to ensure success of the programme.

### 5. DELIVERABLES

**The scope of the project shall include the delivery of the programme, administration and certification within a period of 18 months.**

The expected deliverables are as follows:

- 5.1 Facilitation and coordinate all the activities in Gauteng and Western Cape for the training and delivery of Post-Graduate Diploma in Financial Planning
- 5.2 Participate in the induction with Candidates and Employers
- 5.3 Develop and implement the appropriate mode of delivery of the training. The mode must be in a flexible virtual model or the block sessions.
- 5.4 Compiling and Delivery of training/study material to the candidates
- 5.5 Provision of the candidate support as it pertains to the training.
- 5.6 Monitoring the candidate's performance, attendance and reporting on the same
- 5.7 All other administration requirements pertaining to the implementation of the training.
- 5.8 **The overall duration of the programme duration is 18 months** however the learning/training component must be completed in 12 months and the last 06 months is for certification including the graduation.
- 5.9 Facilitation of the learning programme which includes, but not limited to:
  - a) Delivery of training
  - b) Action learning and coaching
  - c) On- going assessments throughout the programme
  - d) Research



- e) Certification and
- f) Graduation ceremony
- 5.10 The provider must ensure that the candidate write the Professional Competency Examination (PCE)
- 5.11 On completion of the qualification, the provider must be able to assist the candidates with the registration with the professional body of the Financial Planners to become certified financial planners.

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## 5. REQUIREMENTS

Compulsory Requirements on response of this expression of interest:

- 6.1 The signed expression of interest application form
- 6.2 Proof of accreditation with the Council for Higher Education (CHE) as a Business School or a Higher Learning Institution (Public)
- 6.3 Proof of accreditation to implement/teach the Postgraduate Diploma in Financial Planning
- 6.4 Course information that includes the following:
  - 6.4.1 Course Overview
  - 6.4.2 Modules
  - 6.4.3 Duration
  - 6.4.4 Teaching Methods
- 6.5 A pricing schedule that is inclusive of the following:
  - 6.5.1 The deliverables as indicated in the scope of work and deliverables.

## 5. ENQUIRIES AND SUBMISSION

- a. Application enquires can be forwarded to **Ms Kgomotso Makgaleng** at [kgomotsoma@inseta.org.za](mailto:kgomotsoma@inseta.org.za) or [internships@inseta.org.za](mailto:internships@inseta.org.za) or **0113818900**.
- b. The signed EOI form including the supporting documents must be submitted to [internships@inseta.org.za](mailto:internships@inseta.org.za) by **not later than 24 May 2024**.

