

CHIETA's Credible Mechanism For Skills Planning,
Presentation To LMIP Roundtable, 5 August 2015
Acting CEO, Ayesha Itzkin,

**The catalyst for skills, economic
growth and employability**

WHY THE NEW ONLINE SKILLS PLANNING PLATFORM?

Challenges before electronic platform was developed:

- Company consultation on WSP very difficult to confirm – Unions and business sometimes not finding each other
- WSP information submitted by company to obtain mandatory grants could not be confirmed as accurate and often lacked credibility
- Through the electronic platform, many challenges of the manual system were obviated.
 - No longer heavily paper driven or labour intensive, also for SDF
 - Time consuming nature of preparation of WSPs, evaluation, MG pay-out, scarce and critical skills analysis for SSP and for DG funding
 - Difficulty of evaluation and credibility of data
 - Difficulty of evaluation and credibility of data
 - The usefulness and reliability of the information both to CHIETA and the company questionable
 - Lack of standard classification of existing competencies and gaps
 - Difficulties experienced at company level yielded far fewer WSPs as compared to now
 - CHIETA did not know if it was allocating funding to the right training and development areas
 - Compliance to various legislative requirements is now assured as rules are built in
 - Another level of monitoring of deliver now available
- Information about the member company's investment in training (both financial and developmental per employee) was not clear.

CONCEPTUALIZING AND DEVELOPING THE CREDIBLE MECHANISM FOR ONLINE SKILLS PLANNING & REPORTING

- 2010-CHIETA recognised the importance of doing something concrete to obtain good quality data for skills planning and addressing the needs of companies
- CHIETA recognised the criticality of obtaining credible **qualitative and quantitative** sector data for skills planning and ensuring optimal ROI on Skills development and considered allocation of training grants
- Started in 2011 with design of the electronic platform customised to CHIETA and company needs for collection, analyses and aggregation of detailed employee data from its source from employers administration systems for WSP-ATR purposes
- Concerted effort to ensure continuous improvement of data from 2011 and continuous improvement over the years, based on experience and incorporating new developments, regulations etc
- Compliance with a myriad of legislation required
- Central to achieving success is capacity building targeted at company level of practitioners and committees (SDC's) throughout the skills planning cycle for WSP, DG applications and for understanding the skills development language, how the Organisation Framework for Occupations (OFO) works, its value, etc
- OFO is central to this electronic process and is utilised at the 6 digit level)
- Companies understood that the OFO was a useful categorisation tool that ensured standardisation and common language for skills planning purposes in the sector, and they now work well with it, the guessing game is gone!

ONLINE SYSTEM SUPPORTS COMPLIANCE REQUIREMENTS

<p style="text-align: center;">PFMA</p> <p>Treasury summarises the key objectives of the Act as:</p> <ul style="list-style-type: none"> • Modernise the system of financial management in the public sector; • Enable public sector managers to manage, but at the same time be held more accountable; • Ensure the timely provision of quality information; and • Eliminate the waste and corruption in the use of public assets 	<p style="text-align: center;">AGSA</p> <p>AGSA looks to ensure that :</p> <ul style="list-style-type: none"> • Public funds are spent for the intended purpose. • Fair presentation and absence of significant misstatements in financial statement • Reliable and credible performance information for predetermined objectives • Compliance with all laws and regulations governing financial matters 	<p style="text-align: center;">GRANT REGS COMPLIANCE</p> <ul style="list-style-type: none"> • SETAs must be 95% committed at the end of each financial year • SETAs must commit 80% of discretionary grants on PIVOTAL Programmes
<p>Banking details are captured on the system by companies. Upon receipt of hard copy of proof of banking details, the finance specialist will approve the banking details on the system. Payments are made with banking file created from the system, hence payments are made only to approved, authorised accounts.</p>	<p>All requirements of AGSA are build into the system to ensure that the commitment schedules are accurate and updated monthly. Aligning payments to the system, ensures that financial records are accurate and can be cross checked and reconciled</p>	<p>System has rules built into it to comply with the new grants regulations.</p>
<p>Various levels of approvals for payments on they system, ensure that managers at all levels are held accountable.</p>	<p>Performance information is captured on the system per learner. Hard copies are filed</p>	<p>CHIETA achieved 97% commitment in the FY 2014-2015</p>
<p>Ensure accurate information at a click of a button</p>	<p>General compliance rules are built into the system</p>	<p>CHIETA allocated 95% of grants to PIVOTAL</p>
<p>Sophisticated system minimises risk of corruption</p>	<p>.</p>	

BUILDING A VALUE-CHAIN DRIVEN OFO CODING BASED CREDIBLE MECHANISM FOR SKILLS PLANNING

Purpose of developing the online system:

To obtain credible, valid and auditable information on all employees at member companies, their competencies, training needs, demographics, company training spend, and how to optimally allocate CHIETA funding, monitor progress, etc. Online system must be used to access CHIETA funding. Another solution available for small companies.

Therefore we needed to have available:

Source Data Collection **from the HR desks at companies to obtain:**

- Occupation Profiles
- Employee Job Profiles
- Business Unit Matrices
- Skills Audit information for future planning
- Career Guide
- Individual worker development and Organisation Development Plans for growth pathways

To get a full understanding of who is being trained for what, by who, where, when and what more is needed for the company and its employees to create a skilled and capable workforce for the South African economy.

HOW IS CHIETA CREATING THE CREDIBLE ONLINE SYSTEM FOR SKILLS PLANNING

- Skills planning process is informed by **detailed, reliable, accurate and auditable data**, and is open and transparent, allows understanding of the existing skills of each employee and interventions needed. **How? By obtaining actual source data per employee from each member company.**
- Clear understanding of the skill sets required by the organisation and by industry
- Training interventions are fit-for-purpose
- Training plans are systematic and targeted
- Career planning
- **Matching supply and demand**
- Improved ROI on training spend
- Member company's investment in training (both financial and developmental per employee) is now reflected clearly in the source data too
- 1st Trends Analysis Report published in 2014

Source Data
WSP/A
TR

Occupation Handbook /
Employee Job Profiles

Business Unit Matrix

Skills survey

Career Guide

Individual / Organisation Skills Profile

CHIETA Supply side database is coming...

BUILDING BLOCKS FOR A CREDIBLE MECHANISM FOR SKILLS PLANNING

- Source Data Collection from the HR desks at firms, followed by analysis and interpretation of accurate training and development data
- Occupation Profiles
- Employee Job Profiles
- Business Unit Matrix
- Skills Audit
- Career Guide
- Individual worker development and Organisation Development Plans available
- Trend analysis possible
- Impact can be measured

Source data - company verification-How?

KEY BENEFIT: TAKE THE SLOG OUT OF WSP/ATR/PIVOTAL PLANNING PROCESS AND SUBMISSION AT THE COMPANY AND PROVIDES VALUE ADDING INFORMATION FOR DECISION MAKING PURPOSES

- Previously, companies reluctant to supply data, now they provide it from the company's payroll and salary administration systems (e.g. SAP, VIP, etc)
- Now, much like the SARS e-filing system, a verification process is conducted on various levels in the company including, CEO, CFO, Senior Training Manager
- Problematic submissions automatically returned to company,
- Verifications include inter alia:
 - Check and confirm member company registration and SDL No
 - Check and confirm banking details signed of by highest level at the company
 - Confirm company approved SDF
 - Programmatic check against levy history and details
 - Verify previous delivery history
- **WSP/ATR/PP automatically generated after source data is loaded**
- System generated approvals and payment module for MG and DG
- Commitment schedules real time, online
- Able to send communication to all participating companies via the system at the press of a button
- Small companies also able to participate

HOW HAS CHIETA PROGRESSED?

- Source Data Collection ✓
 - Occupation Profiles ✓
 - Employee Job Profiles ✓
 - Business Unit Matrix ✓
 - Career Guide ✓ (Planned 2015),
 - **Occupational Handbook available**
 - Individual and Organisation Development Plans ✓
- Skills Audit still coming (Individual training needs analysis)

BUSINESS UNIT MATRIX – RELATES TO TYPICAL CHEMICAL SECTOR ORGANISATION VALUE CHAIN

- A value chain is a sequence of processes that an organisation needs to complete in order to perform its function
- Research conducted via the platform in 2014 has identified the following business unit clusters as being of relevance in the Chemical Sector:
 - Business Infrastructure
 - Human Resource Management
 - Technology Development
 - Logistics & Warehousing
 - Operations: Manufacturing & Production
 - Marketing, Distribution & Sales
- The OFO clusters jobs but it still does not tell us where in the value chain these occupations operate. E.G. Is a Manufacturing Manager functioning in the Technology Development or Operations space? Though qualifications could be the same the level of **specialised development for the specific focus of the value chain will differ**
- In the absence of a detailed Training Needs Analysis or Skills Audit, the Business Unit Matrix gives a good indication of the developmental areas per occupation
- The Business Unit Matrix helps to identify feeder occupations and progression paths per occupation

BUSINESS UNIT MATRIX-MAPPING OF OCCUPATIONS AGAINST BUSINESS AREA NEEDS

1	2	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	AK	AL	AM	AN	AO	AP	AQ	AR	AS	AT	AU	AV	
		1									2						Logistics & Warehousing					Operations: Manufacturing & Production							
		Focus 2013	Dictionary 2014		Mapping consideration	DFD Code	Base Chemicals	Explosives	Fast Moving Consumer Goods	Fertilisers	Glass	Petroleum	Pharmaceuticals	Specialty Chemicals	Surface Coating	CHIETA	Inventory & Stock	Receiving, Inbound	Dispatch, Outbound	Warehouse / Storage	Transportation & Shipping	Materials	Production Planning, Control & Quality	Operations	Packaging & Storing	Maintenance	Service & Recycling	Waste & Recycling	
		2		Occupation Title																									
		284		Film, Stage and Related Directors and Production Technicians		2654	2	0	2	1	0	6	1	6	7	25													
		285		Actors		2655	0	0	0	0	0	0	0	0	0	0													
		286		Announcers on Radio, Television and Other Media		2656	0	0	0	0	0	0	0	0	0	0													
		287		Creative and Performing Artists Not Elsewhere Classified		2659	0	0	0	0	0	0	0	0	0	0													
		288	X	X	Chemical and Physical Science Technicians	3111	446	113	260	95	51	1035	743	627	431	3801										X			
		289	X	X	Chemistry Technician	311101	378	112	193	79	22	1022	661	587	408	3462										X			
		290	X	X	Physical Science Technician	311102	59	1	64	16	29	13	82	39	23	326									X				
		291	X	X	Radiation Control Technician	311103	9	0	0	0	0	0	0	0	0	9									X			X	
		292	X	X	Fragrance Evaluator	311104	0	0	3	0	0	0	0	1	0	4									X	X			
		293			Civil Engineering Technicians	3112	8	1	36	0	0	35	6	14	2	102													
		294			Civil Engineering Technician	311201	8	1	36	0	0	34	6	14	2	101													
		295			Surveying or Cartographic Technician	311202	0	0	0	0	0	1	0	0	0	1													
		296	X	X	Electrical Engineering Technicians	3113	94	69	18	16	22	299	19	27	0	564												X	
		297	X	X	Electrical Engineering Technician	311301	81	69	18	16	22	299	19	27	0	551										X		X	
		298			Electric Substation Operations Manager	311302	13	0	0	0	0	0	0	0	0	13												X	
		299	X	X	Electronics Engineering Technicians [Including Comp	3114	24	0	4	0	36	75	19	2	8	168									X		X		

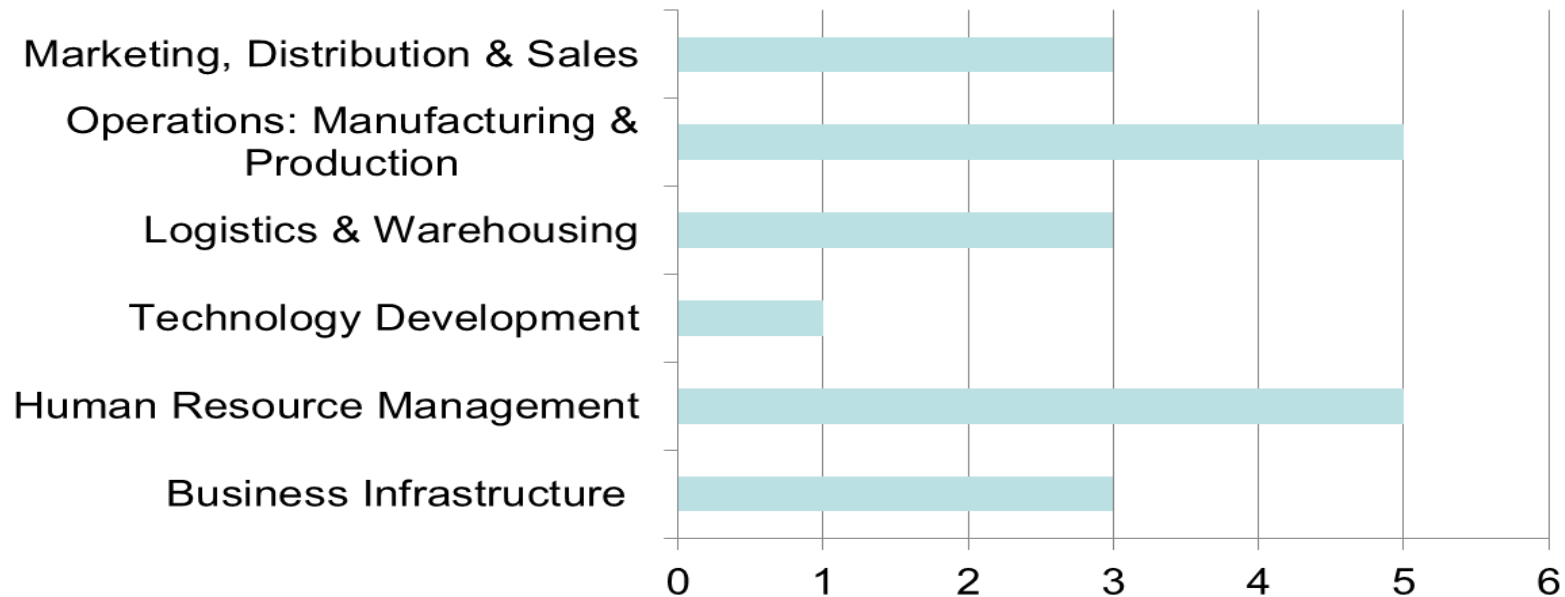
Human Resource Manager

CHIETA, The Catalyst for Enhanced Skills, Economic Growth and Employability

Business Unit Clusters	Business Unit
Business Infrastructure	General Management
	Accounting
	Finance
	Strategic Planning
	Governance
	Public Relation
	Administration
	Information and Communication Technology
	Policy
	Research and Development
Human Resource Management	Recruitment
	Administration
	Training & Development
	Labour
	Occupational Health and Safety
Technology Development	Research and Development (R&D)
	Improvement and Optimisation
	Intellectual Property
	Decision Support System (Data Warehouse and Business Analysis)
	Environmental Management
	Exploration and Mining
	Production
Logistics & Warehousing	Inventory and Stock
	Receiving / Inbound
	Dispatch / Outbound
	Warehouse / Stores
	Transportation and Shipping
Operations: Manufacturing & Production	Materials
	Production Planning and Control
	Quality
	Operations
	Packaging and Storing
	Service and Maintenance

How many of these people do you have, how old are they, where can you utilise them next, what exposure should they have had, what registrations do they have, which qualifications?

**BUSINESS UNIT LINKED TO OCCUPATIONS
TRAINING AND DEVELOPMENT BUDGET –
THIS INFO SHOWS WHERE THE ORGANISATIONS
TRAINING BUDGET IS BEING SPENT, (ALSO OBTAINED
FROM SOURCE DATA SUBMISSION BY THE COMPANY)**



AREAS COVERED BY SOURCE DATA SUBMISSION : PRE-SKILLS AUDIT PROJECT

- Prepares organisations to conduct their own detailed training needs analysis or skills audit
- Consolidates the following sources of information into a pre-skills audit report that can assist in skills planning process:
 - CHIETA's Occupation Handbook
 - WSP-ATR Mapping Review per Chamber
 - CHIETA's Occupation Scope Definition
 - CHIETA's Qualifications Matrix
 - CHIETA's Business Unit Matrix
 - Company's WSP / ATR Source Data
- Creates a Job Profile for each employee linked to the Occupation Handbook

PRE-SKILLS AUDIT PROJECT INPUTS

PURPOSE OF THE CHIETA OCCUPATIONS HANDBOOK

The CHIETA Occupations Handbook provides a standardised and detailed update of occupational profiles considered important within the chemical sector, located within the OFO. It is a working document for the sector that contains occupations and related output or competence indicators the chemical sector requires to perform its core functions, including key support occupations in the sector. The information defined in the profiles forms the baseline for skills development planning and reporting.

PRE-SKILLS AUDIT PROJECT INPUTS



**Towards the Establishment of a Credible Institutional Mechanism
for Skills Planning within CHIETA:**

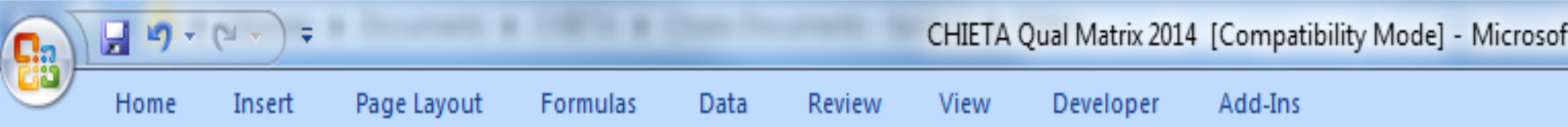
Defining the CHIETA's Scope in terms of Occupations.

PRE-SKILLS AUDIT PROJECT INPUTS



WSP/ATR Job Title-to-OFO Occupation Mapping Review

PRE-SKILLS AUDIT PROJECT INPUTS



	A	B	C	D	E	F	G	
1	OCCI	OCCUPATION	TRADE	FOCUS	REF	QUALIFICATIONS	QUAL/LEARN	ETC
2	121206	Health and Safety Manager		YES	Generic	Advanced or Postgraduate Diploma in Occupational Health		
3	121206	Health and Safety Manager		YES	Generic	Degree/Diploma in Environmental Health		
4	121206	Health and Safety Manager		YES	Generic	Degree/Diploma in Technology in Environmental Health		
5	121206	Health and Safety Manager		YES	Generic	Degree/Diploma in Technology in Environmental Science		
6	121206	Health and Safety Manager		YES	Generic	Degree/Diploma in Technology in Occupational Hygiene		
7	121206	Health and Safety Manager		YES	Generic	Master of Technology in Environmental Health		
8	121206	Health and Safety Manager		YES	19731	Advanced University Diploma: Occupational Health	REGISTERED QUAL	NO
9	121206	Health and Safety Manager		YES	16499	Advanced University Diploma: Occupational Health Care	REGISTERED QUAL	NO
10	121206	Health and Safety Manager		YES	65351	Bachelor of Technology: Environmental Health	REGISTERED QUAL	NO
11	121206	Health and Safety Manager		YES	72398	Bachelor of Technology: Environmental Health	REGISTERED QUAL	NO
12	121206	Health and Safety Manager		YES	87084	Bachelor of Technology: Environmental Health	REGISTERED QUAL	NO
13	121206	Health and Safety Manager		YES	72132	Bachelor of Technology: Environmental Health	REGISTERED QUAL	NO
14	121206	Health and Safety Manager		YES	78697	Bachelor of Technology: Environmental Health	REGISTERED QUAL	NO
15	121206	Health and Safety Manager		YES	73825	Bachelor of Technology: Environmental Health	REGISTERED QUAL	NO
16	121206	Health and Safety Manager		YES	60631	Bachelor of Technology: Environmental Management	REGISTERED QUAL	NO
17	121206	Health and Safety Manager		YES	72399	Bachelor of Technology: Environmental Management	REGISTERED QUAL	NO
18	121206	Health and Safety Manager		YES	73937	Further National Higher Diploma: Occupational Health Nursing S	REGISTERED QUAL	NO

PRE-SKILLS AUDIT PROJECT INPUTS

1	2	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	AK	AL	AM	AN	AO	AP	AQ	AR	AS	AT	AU	AV
	1	1									2						Logistics & Warehousing					Operations: Manufacturing & Production						
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	285			Actors		2655	0	0	0	0	0	0	0	0	0	0												
	286			Announcers on Radio, Television and Other Media		2656	0	0	0	0	0	0	0	0	0	0												
	287			Creative and Performing Artists Not Elsewhere Clas:		2659	0	0	0	0	0	0	0	0	0	0												
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	290	X	X	Physical Science Technician		311102	59	1	64	16	29	13	82	39	23	326							X					
	291	X	X	Radiation Control Technician		311103	9	0	0	0	0	0	0	0	0	9								X			X	
	292	X	X	Fragrance Evaluator		311104	0	0	3	0	0	0	0	1	0	4							X	X				
	293			Civil Engineering Technicians		3112	8	1	36	0	0	35	6	14	2	102												
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	297	X	X	Electrical Engineering Technician		311301	81	69	18	16	22	299	19	27	0	551								X		X		
	298			Electric Substation Operations Manager		311302	13	0	0	0	0	0	0	0	0	13											X	
	299	X	X	Electronics Engineering Technicians [Including Comp		3114	24	0	4	0	36	75	19	2	8	168								X		X		

PRE-SKILLS AUDIT PROJECT OUTPUTS

- **Pre-Skills Audit Report** consisting of:
 - Employees linked / not linked to Handbook
 - Race / Gender/ Age / Qualification / Employment Equity Profile per Occupation
 - Planned and Actual Training Beneficiaries per Occupation
 - Planned and Actual Training Cost per Occupation
 - Detailed occupation profile from handbook

PRE-SKILLS AUDIT PROJECT OUTPUTS

Sample of a pre-skills audit report

PRE-SKILLS AUDIT PROJECT OUTPUTS

- **Job Profile per Employee** consisting of:
 - **Purpose Statement** – Is this what you do?
 - **Tasks / Outputs** – Learning Requirements?
 - **Knowledge** – Learning Requirements?
 - **Professional Registration** – Continuous Development?
 - **Qualifications** – Suitability / Job Fit?
 - **Feeder & Progression Occupations** – Career planning?
 - **Value Chain Utilisation (Business Unit)** – Specialisation tailored for specific outputs?

OCCUPATION HANDBOOK MAPPING TOOL INTEGRATION-GAP ID

Please enter search criteria for occupation:
Please click on Occupation for more information:

Search	Select Occupation
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FO Major Group: 3 TECHNICIANS and ASSOCIATE PROFESSIONALS
Technicians and associate professionals perform mostly technical and related tasks connected with research and the application of scientific or technical concepts and operational methods, and government or business regulations.

FO Submajor Group: 33 Business and Administration Associate Professionals
Business and administration associate professionals perform mostly technical tasks connected with the practical application of knowledge relating to financial accounting and transaction matters, mathematical calculations, human resource development, selling and buying financial instruments, specialised secretarial tasks, and enforcing or applying relevant government rules. Also included are workers who provide business services such as customs clearance, etc.

FO Minor Group: 335 Regulatory Government Associate Professionals
Regulatory government associate professionals administer, enforce or apply relevant government rules and regulations relating to national border control, social benefits, and issue or examine applications for licences or authorizations in connection with travel, exports and imports of goods, establishments, businesses, erection of buildings and other activities subject to government regulations.

FO Unit Group: 3359 Government Regulatory Associate Professionals not Elsewhere Classified
This unit group covers government regulatory associate professionals not classified elsewhere in major group 3, technicians and associate professionals. For instance the group includes agricultural, fisheries, forestry, prices, wages and weights and measures inspectors. Mapping Consideration: Regulatory government associate professionals administer, enforce or apply relevant government rules and are normally employed in the public sector and not in Private Companies.

FO Occupation (T: Trade, G: Green Occupation, S: Green Skill Occupation): 335904 Pest Management Officer
Identifies pests and monitors and controls threats and infestations by pests in industrial, commercial and domestic sites according to environmental protection, public health and food safety regulations and protocols. Mapping Consideration: Regulatory government associate professionals administer, enforce or apply relevant government rules and are normally employed in the Public sector and not in Private Companies.

Occupation Tasks

- Unit Task: Examining places of business to ensure the use of correct weights and measures in trade
- Unit Task: Monitoring price regulations to assess appropriateness of costs for goods and services to protect consumer interests
- Unit Task: Monitoring wage regulations to ensure appropriate levels of pay for work performed and to assess compliance with employment standards legislation
- Unit Task: Performing related investigative and administrative tasks to record findings, document compliance problems or inappropriate business practices and Pest Management Officer-Carry out surveys, control and eradication treatments for a wide range of pests which include rats, mice, fleas, bugs, cockroaches, etc.
- Pest Management Officer-Under supervision to investigate complaints related to public health legislation; interview complainants and such other persons who report pest infestations.
- Pest Management Officer-In specified circumstances and in accordance with written instructions prepare basic statutory notices under the direction of the Service Manager.
- Pest Management Officer-To drive and be responsible for a council vehicle and be responsible for the equipment which includes a full range of rodenticides, insecticides, etc.
- Pest Management Officer-Keep up to date with current practice on pest control measures in order to give advice to members of the public and council staff
- Pest Management Officer-Keep the Service Manager informed of all relevant matters in connection with the duties of the post.
- Pest Management Officer-Comply with the requirements of the organisation's safety policy and the OSH Act, together with associated legislation.

CHIETA Handbook – Profile Indicator

Business Unit – Mapping Considerations

CHIETA Handbook – Tasks

CREDIBLE MECHANISM FOR SKILLS PLANNING

KEY SUCCESS INDICATOR

- Value-Driven versus Compliance-Driven Skills Planning
- Companies use the electronic platform and participation for mandatory grants has increased.
- Enables CHIETA to be the Authority on skills planning – credible, actual sector data available on an aggregated and disaggregated level
- A key test for a truly credible mechanism for skills planning, is that it will continue to exist, even in the absence of legislation.

Additional benefits of CHIETA 's electronic skills planning platform

- WSP is generated automatically from the source data when company submits source data
- WSP / ATR submission numbers – prior to electronic system implementation over 4 years: 510, 626, 715, 764
- Employer satisfaction survey – very positive feedback on satisfaction levels
- By creating the occupations handbook, we have assisted companies to ensure that establishment of benchmarked occupational profiles, tasks, competencies are available– designed to ensure skills gaps are better identified and return on investments for training interventions is maximized
- Online process in comparison to manual – cost saving, ease of analyses, rules and legislative requirements programmed into CHIETA's on line platforms realizing much greater efficiencies and cost minimization
- Set of rules built into the online CHIETA platform allows CHIETA to analyze seamlessly, in real time on submission, time saving and enables faster decision making and generation of contracts for grants.
- The system is recently aligned to the Quarterly Monitoring Reporting processes

ONLINE DISCRETIONARY GRANT APPLICATIONS AND MANAGEMENT

DG Applications

- DG Applications are completed online
- All applications are evaluated online at another 3 levels of evaluation

Approvals

- Final Board approvals are completed on the system.
- MOAs and letters of award are automated to be sent off the system, as per board approvals
- Stakeholders download MOAs directly from the system

MOA Mgnt

- MOAs are managed on the system
- Stakeholders can sign and upload MOA back onto the system, this triggers the contract to be populated and added to the **commitment schedule** which is also automated onto the system. Learners details with learner status is uploaded onto the system by the stakeholder. Learning agreements are automatically generated by the system, which can be downloaded by companies, with all learner details already populated on the Agreement. Details completed on the system comply with the DHET Guidelines as provided for the **SQMR**

Tranche disbursement

- Site visit is conducted and other evidence of implementation is collected
- Payment is made against the number of active learners on the system, as validated by site visit
- Regional Skills advisors also prepare their monitoring report on the system recording sweeps and recoveries too
- Commitment schedules are auto populated as grants are disbursed

QUESTIONS?