

No. 1079

17 September 2004

SOUTH AFRICAN QUALIFICATIONS AUTHORITY (SAQA)

In order to proceed with the recognition of Standards Generating Bodies in terms of Government Regulations 19(1)(c) and 22(2) of 28 March 1998, National Standards Body 03, **Business Commerce and Management Studies**, invites public comment with respect to *the acceptability of the nominees and the representativeness of the key education and training stakeholder interest groups* listed as SGB applicants below.

In addition, the NSB invite submissions from interested parties wishing to serve on such an SGB. Interested parties should take note of the section on SGB Information below.

All nominations/ applications should be accompanied by curricula vitae.

More information regarding this application may be obtained on the SAQA website or from the SAQA offices, Hatfield Forum West, 1067 Arcadia Street, Hatfield, Pretoria.

Comment should reach the NSB at the address below **by not later than 15 October 2004**. All correspondence should be marked **SGB for Insurance and Investment** and be addressed to:

The Director: Standards Setting and
Development
SAQA

Attention: Mr. D Mphuthing
Postnet Suite 248
Private Bag X06
Waterkloof
0145

or faxed to 012 – 431 5144
mmphuthing@sqa.co.za

SGB INFORMATION

As a necessary step in the development and implementation of the National Qualifications Framework, The National Standards Bodies are briefed [regulation 19(1)(c) of 28 March 1998] to recognise or establish Standards Generating Bodies (SGBs).

SGBs shall:

- a. generate standards and qualifications in accordance with the Authority requirements in identified sub-fields and levels;
- b. update and review standards;
- c. recommend standards and qualifications to National Standards Bodies;
- d. recommend criteria for the registration of assessors and moderators or moderating bodies; and
- e. perform such other functions as may from time-to-time be delegated by their National Standards Body.

Any bodies wishing to nominate representatives, make application to serve on, or make any other submission with regard to the above SGB should note the following information.

SGBs should be composed of organisations, which shall be key education and training stakeholder interest groups and experts in the sub-field. The NSB, when making its final decisions will have due regard for, among other things, *'the need for representativeness and equity, redress and relevant expertise in terms of the work of the SGBs.'*

Organisations proposing to nominate persons to SGBs should be sensitive to the need for **equity** and **redress**, and shall nominate persons who-

- (a) will be able to consider issues of productivity, fairness, public interest and international comparability as related to education and training in the sub-field;
 - (b) enjoy credibility in the sub-field in question, who enjoy respect; have the necessary expertise and experience in the sub-field and have the support or backing of the nominating body;
 - (c) are able to advocate and mediate the needs and interests of all levels within the sub-field covered by the Standards Generating Body;
 - (d) are able to exercise critical judgement at a high level; and
 - (e) are committed to a communication process between the Standards Generating Body, the National Standards Body and the Constituency.
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**PUBLIC NOTICE BY NSB 03, BUSINESS, COMMERCE AND MANAGEMENT
STUDIES OF THE INTENTION TO ESTABLISH AND REGISTER A STANDARDS
GENERATING BODY (SGB) FOR INSURANCE AND INVESTMENT FOLLOWING
THE EXPIRY OF THE FINANCIAL SERVICES SGB**

PROPOSED BRIEF OF THE SGB

The National Standards Body (NSB) 03, intends to establish and register an SGB for Insurance and Investment from NQF Level 2-6 in order to:

1. Identify, transformation, development, access and equity issues relevant to the sub-field Financial Services and develop mechanisms to include these issues within the standards and qualifications as envisaged below [Regulation 24(1)(a)].
2. Generate appropriate Unit Standards and combine them into the following qualifications in accordance with Authority requirements:
 - National Certificate: Insurance of goods bought on instalments: NQF Level 4
 - National Certificate: Financial Services Long Term Insurance: Risk Assessment: NQF Level 5
 - National Certificate: Risk Finance/Enterprise Wide Risk Management: NQF Level 5
 - National Diploma: Financial Services: Long Term Risk Assessment: NQF Level 5
 - National Diploma: Healthcare Benefits Administration: Product Management: NQF Level 5
 - National Diploma: Risk Finance / Enterprise Wide Risk Management: NQF Level 5
 - Bachelor of Commerce: Financial Planning and Investment: NQF Level 6
3. Review and revise registered Qualifications and Unit Standards that reach end of registration period:
 - National Certificate: Insurance: NQF Level 3
 - National Certificate: Healthcare Benefits Administration Claims Assessing: NQF Level 4
 - National Certificate: Collective Investments: NQF Level 4
 - National Certificate: Long Term Insurance: NQF Level 4
 - National Certificate: Short Term Insurance: NQF Level 4
 - National Certificate: Risk Management: NQF Level 4
 - National Certificate: Wealth Management: NQF Level 5
 - National Certificate: Wealth Management: NQF Level 4
 - National Certificate: Financial Services Management: NQF Level 3
 - National Certificate: Financial Services Management: NQF Level 4
 - Unit Standards: Trustees of Pension Funds
 - Unit Standards: Specialised Insurance

4. Work with Higher Education institutions on Unit Standards for a Learning Programme leading to a Unit Standard based B.Com: Financial Planning and other Insurance and Investment related qualifications.
5. Develop learning pathways for Qualifications and Unit Standards for Insurance and Investments in the sub-field Financial Services in the National Qualifications Framework organizing field NSB 03, Business, Commerce and Management Studies from NQF Levels 2-6 [Regulation 24 (1)(e)].
6. Recommend the Unit Standards and Qualifications generated in 2 above to National Standards Body 03 [Regulation 24 (1)(c)].
7. Recommend criteria for the registration of assessors and moderators or moderating bodies.
8. Accept and perform other related functions as requested by NSB 03 [regulation 24 (1)(e)].

PROPOSED COMPOSITION OF THE SGB

Name of Nominee	Workplace	Nominating Body	Qualifications/Experience
Bonnie Mincher	Association of Collective Investments	Association of Collective Investments	<p>Holds:</p> <ul style="list-style-type: none"> • Bachelor of Arts • Competency Based Trainer's Certificate • International Teaching and Training Diploma • Post Graduate Diploma in Tertiary Education (Hons.) <p>Has been involved in the development of Unit Standards and Qualifications for the Unit Trust Industry and serves as a representative of the Unit Trust Industry on the Financial Services Consumer Education Committee</p>
Brian Pearce	Damelin School of Training	Damelin School of Training	<p>Holds:</p> <ul style="list-style-type: none"> • B. Econ Degree • CAIB • B. Econ Honours Degree • CIS-Institute of Chartered Secretaries. <p>Has been in the Banking Industry since 1975 and is currently a Director of the Damelin School of Banking.</p>

Janette Clark	Glenrand MIB Health Risk Management Consultants	Glenrand MIB & Financial Planners Institute	<p>Holds:</p> <ul style="list-style-type: none"> • Business Management Diploma <p>Registered and accredited consultant with the Council of Medical Schemes Member of the FPI Standing Committee on Health Benefits. Provides general management of operations and consulting services to corporate companies and medical schemes. Implemented the Wellcare Programme and Health Risk Management Model and is also currently a member of the FPI Standing Committee Health Benefits</p>
Louwrens Stefanus Daniel Coetzer	Western FET College	National Professional Teachers' Organisation	<p>Holds:</p> <ul style="list-style-type: none"> • Trade Certificate: Mechanician Weapons • National Technical Diploma (Weapons) • National N. Diploma (Electrical) • National N. Diploma (Engineering Management) • National Certificate: Drawing Office Practice • Higher Education Diploma: Technical • Certificate in Business Management • Bachelor of Education <p>Is a member of SACE and National Secretary for SAUVSE, as well as Vice Chairperson for the Chamber of Commerce in Mpumalanga.</p>
Judy Ryan	Momentum Collective Benefits	Momentum Collective Benefits	<p>Holds:</p> <ul style="list-style-type: none"> • B.Sc. Occupational Therapy (OT) <p>Has been with Momentum since 1997 and is currently Claims Manager-Technical Training.</p>

Amelia Venter	Medi-Help Medical Scheme	Healthcare Benefits Administrator (HBA) Medi-Help	<p>Holds:</p> <ul style="list-style-type: none"> • Bachelor of Arts • Higher Education Diploma • Human Resources Development (Hons.) • M. Phil. – Personal & Professional Leadership (Cum Laude) <p>Experience in the writing of Qualifications and Unit Standards for the Health Care Administration sub-sector</p> <p>Served on:</p> <ul style="list-style-type: none"> • the INSETA's ETQA/Learnership Exco • Representative of the Health Care Benefits Administration sub-sector • Served on the INSETA's SDF Committee for Gauteng
Michael Salant	Marsh SA	Short Term Intermediary: Technical and Claims Specialist	<p>Holds:</p> <ul style="list-style-type: none"> • B.A. • LLB • Associate of the Chartered Insurance Institute - Conversion and acceptance <p>Chairman of the Technical Forum and the Claims Forum at Marsh SA.</p>
Stephan van Huyssteen	Swiss Re Africa Limited	Swiss Re Africa Limited (Life and Health) Long Term Insurer	<p>Holds:</p> <ul style="list-style-type: none"> • Masters Degree (Industrial and Personnel Psychology) <p>Served as:</p> <ul style="list-style-type: none"> • AECI Human Resources Manager • NATREF Human Resources Officer • Foreign Affairs Administration Officer <p>Is registered as a Psychologist with the HPCSA</p>
Lesley Beckbessinger	Mutual and Federal Insurance Group	Mutual and Federal Insurance Group	Associate of the Chartered Insurance Institute Fellow of the Chartered Insurance Institute

			Experienced Manager Programme
Sovashni Hefele	SANLAM	Life Officers Association- LOA	<p>Served as:</p> <ul style="list-style-type: none"> • Human Resources Development Manager – Koeberg Nucleur Power Station • Manager for Further Studies, Generic non-technical and Leadership Programmes, as well as the Employment Equity Project for Koeberg. • HRD Manager at BoE Asset Management. Has experience in organizational restructuring and Industrial Relations. • Is currently with Sanlam.
Charles Patrick Wells	Society of Banking Officials (SASBO)	Society of Banking Officials (SASBO)	<p>Holds:</p> <ul style="list-style-type: none"> • Institute of Bankers in South Africa (Associate Diploma) • MDP – Human Resource Management • DPLR- Development Program in Labour Relations • Licetiate Diploma in Banking – LIBSA <p>Is a Board Member of SASBO Pension Fund, Bankmed and Chairman's Remunerations Committee and was an active member of the Financial Services SGB</p>
Daryl Morris	Glenrand MIB Benefit Services	Long Term Intermediary / Legal / Compliance	<p>Holds:</p> <ul style="list-style-type: none"> • B. Proc • H. Dip. Tax <p>Member of the Pension Lawyers Association Admitted Attorney Has experience in Pensions, Life, Healthcare, Tax and Life Insurance as well as Investments</p>

Karen Levy Strauss	Alexander Forbes	Alexander Forbes Long Term and Short Term Intermediaries Skills facilitator	<p>Holds:</p> <ul style="list-style-type: none"> • Dip. Education Training and Development Practitioner • Diploma in PC Support Microsoft Certified Professional – Word and Excel <p>Is a qualified Assessor-NQF 5, 6 Qualified Skills Development Facilitator Is a Member of:</p> <ul style="list-style-type: none"> • INSETA Skills Development Committee • INSETA Financial Advisors Intermediary Services Act Industry Advisory Workgroup • SA Chapter of the American Society for Training and Development • ELDP/LAP Committee for the Development of Skills Development Strategies to meet both the FAIS and Financial Services Charter requirements.
Peter Latham	Glenrand MIB	Enterprise Wide Risk Management	Associate of the Chartered Insurance Institute Chartered Insurance Practitioner. Has been in the Insurance Industry since 1966.
Tatiana Sosznianin	Consultant	INSETA	<p>Holds:</p> <ul style="list-style-type: none"> • BA: (English and Psychology) <p>ABET Trainer: Corporate College's English Programmes Practical Management Trainer Is a Consultant for the INSETA.</p>
Prof. Tom Cronje	University of South Africa	University of South Africa	<p>Holds:</p> <ul style="list-style-type: none"> • B. Commerce • B. Commerce (Hons.) • Masters Degree in

			<p>Commerce</p> <ul style="list-style-type: none"> • Diploma in Tertiary Education • Doctor of Commerce. <p>Serves on the Institute of Bankers in South Africa.</p>
Prof. Ebo van Oost	University of Pretoria	University of Pretoria	<p>Holds:</p> <ul style="list-style-type: none"> • Doctorate in Investment Management <p>Head of Department of Financial Management University OF Pretoria Chairperson of the School of Financial Services University of Pretoria Held a senior position at the SA Reserve Bank as head of the capital market section in the Department of Economics responsible for Capital Market activities in the quarterly Bulletin.</p>
Prof. R. Vivian	University of the Witwatersrand Chair Insurance Studies	University of the Witwatersrand	<p>Holds:</p> <ul style="list-style-type: none"> • Bcom • BCom (Hons) (Investment Management) • MCom (Economics), Chartered Financial Analyst (CFA) <p>Is a member of:</p> <ul style="list-style-type: none"> • SAIMS • IASSA • CFAI <p>Has twelve years tertiary level teaching experience in the subject areas of Investment Management, Financial Management Economics, Managerial Economics and Personal Financial Planning.</p>
Prof. Henco van Schalkwyk	Rand Afrikaans University	Rand Afrikaans University	<p>Holds:</p> <ul style="list-style-type: none"> • BCom • BCom (Hons.) Investment Management • MCom (Economics) • Chartered Financial Analyst <p>Is an Associate Professor in</p>

			<p>Investment Management and has twelve years teaching experience at Tertiary level</p> <p>Is a member of:</p> <ul style="list-style-type: none"> • the SA Institute of Management Scientists • Investment Analysts Society of SA • CFA Institute
Noelene Harding	Council for Medical Schemes	Council for Medical Schemes	<p>Holds:</p> <ul style="list-style-type: none"> • BA Law • LLB Degree <p>Senior analyst for registration and accreditation at the Council for Medical Schemes.</p>
Haydn Marchant	Insurance Industry Employers Association	Insurance Industry Employers Association	<p>Chief Executive Officer of the Insurance Industry Employers Association. Served as Strategic Risk Management Unit Manager: Mercantile & General Reinsurance, Direct Marketing Manager: Mercantile and General Reinsurance. Past President of the Insurance Institute of Gauteng. Past Chairperson of the Association of Direct Marketing Underwriters</p>
Robin Atkinson	The Institute of Risk Management SA - IRMSA	Risk Management Industry Professional Body	<p>Has worked in the Insurance Industry, in the United Kingdom as well as in South Africa since 1963, in the positions of Regional Director, Chief manager, Assistant General Manager and Executive Director. Is currently a Consultant who advises Corporate companies on implications of skills legislation and assists in grant recoveries. Is currently contracted as Gauteng Regional Adviser to the INSETA and to institute of Risk Management in terms of administration and the development of skills programmes.</p>

Linda du Plessis	SA Insurance Association	SA Insurance Association	<p>Holds:</p> <ul style="list-style-type: none"> • Nat. Dip in Public Relations <p>Is currently responsible for Marine Insurance, Aviation Insurance, Property Insurance, Personal Lines Insurance, Engineering Insurance and other technical issues in the South African Insurance Association, as Committee Secretary. Also Acting manager for the Intermediaries Guarantee Facility and represents the SAIA on the Veld and Forest Fire Working Group of the Department of Forestry and is Administrator for the SA Pool for the insurance of Nuclear Risks.</p>
Susan Jean Russo	The South African Financial Services Intermediaries Association	The South African Financial Services Intermediaries Association	<p>Holds:</p> <ul style="list-style-type: none"> • Diploma in Overseas Trade • RPL Assessment/ Commercial Insurance <p>Has been employed as Managing Director of GIB Marine Insurance Brokers (PTY) Ltd since 1997 and deals with the overall management and running, education and Training and marketing strategies for GIB</p> <p>Is a member of :</p> <ul style="list-style-type: none"> • SAFSIA • Institute of Export • Professional Chartered Institute of Marketing • Insurance Institute of South Africa
Marianne Missio	Liberty Life	Insurance Sector Education and Training Authority	<p>Holds:</p> <ul style="list-style-type: none"> • Bcomm (Industrial Psychology, Commercial Law and Business Economics) • Postgraduate Diploma in Human Resource Management

			Has been in the employ of Liberty Life since 1992 and deal with the management of the recruitment and selection and the Psychological Services functions within the corporate environment. Is currently Head of Human Capital Development
Kathryn Franz	Alexander Forbes	Alexander Forbes	<p>Holds:</p> <ul style="list-style-type: none"> • B. Proc • Diploma: Financial Planning • Advanced Diploma: Financial Planning • Programme in Business Leadership • Masters in Business Leadership <p>Is a member of the Governance and Technical Sub-Committee of the Principal Officer Association, as well as the Financial Planning Institute since 1998.</p> <p>Is a seconded member of the Education Committee of the Institute of Retirement Funds and is also responsible for ensuring representative accreditation for the purpose of FAIS</p>
Robert W. Vivian	University of the Witwatersrand	University of the Witwatersrand	<p>Holds:</p> <ul style="list-style-type: none"> • BSc: Electrical Engineering • BProc • LLB <p>Is a Professor of Insurance and Risk Management at WITS University. He has also held the position of Head of Business Economics, as well as Head of Information Systems.</p>

Portia Malethea Makola	Department of Education	Department of Education	<p>Holds:</p> <ul style="list-style-type: none">• B. Ed• M. Ed (Education Psychology)• B.A. Diploma• Dip. Paed• Diploma in Personnel Management <p>Is Chief Education Specialist at the Gauteng Department of Education Has worked as Quality Assurance Provincial Coordinator and also managed and coordinated the Quality Assurance national training on Whole School Evaluation for the Gauteng Province Is a member of the National Quality Assurance Coordinating Committee and Provincial Coordinator for Systematic Evaluation</p>
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