

Terms of reference

The management and delivery of learnership programmes and skills programmes for employed and unemployed learners by constituent employers in the Wholesale and Retail economic sector

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1. Background:

The NSDS 2005-2010 as well as the Skills Development Act (as amended) infers a duty on the W&RSETA to implement Learning Programmes linked to the scarce and critical skills in the Wholesale and Retail Sector and to fund such implementation through discretionary grants as far as possible.

To this end the W&RSETA has decided to launch the 2008-2009 Learning Programme Projects (which will comprise of both learnerships and skills programmes). This project will benefit both employed (18.1) learners as well as unemployed (18.2) learners.

2. Objective:

The Wholesale and Retail SETA is embarking on a National roll out of learning programmes for:

- the following registered Wholesale and Retail Qualifications: and

Learnership Title	DoL Registration number	SAQA registration number
NC: Retail Perishable Food(3)	27Q270015291203	49792
NC: Wholesale & Retail Buying(5)	27Q270016171205	59299
NC: Wholesale & Retail Distribution(2)	27Q270010391202	49280
NC: Wholesale & Retail Operations Supervision(4)	27Q270009301354	49397
NC: Wholesale & Retail Operations(2)		58206
<ul style="list-style-type: none"> Retail assistant Merchandise Warehouse Assistant Shop Owner 	27Q270014551202 27Q270011551202 27Q270013551202 27Q270012551202	

- The following Non Wholesale and Retail Learning Programmes

ORGANISED FRAMEWORK FOR OCCUPATIONS TITLE	ORGANISED FRAMEWORK FOR OCCUPATIONS CODE
Supply and Distribution Managers	133601
Retail Managers	142101
Butchers	31201
Bakers	351101
Deli Supervisors	831111

These will be sponsored learning programmes (Learnerships as well as Skills Programmes) with a targeted 4250 learners divided as follows:

1. Unemployed (18.2): 1 000 learners on learnerships and 1 000 learners on skills programmes
2. Employed (18.1): 1 250 learners on learnerships and 1 000 learners on skills programmes

3. Scope of Work

The successful employers will be requested to sign a Management and Delivery Contract to this effect and to perform all the duties as per the learnership agreement and in addition thereto manage the learnership as to:

Employers will be required to perform but are not limited to the following:

1. Continuous compliance to the following legislative framework for implementation of learnerships:
 - Skills Development Act
 - Skills Development Levies Act
 - Basic Conditions of employment Act
 - Labour Relations Act
 - Employment Equity Act
 - Occupational Health and Safety Act
 - Compensation for Occupational Injuries and Diseases Act
 - Unemployment Insurance Act
 - SAQA Act
2. Perform the duties as set out in the Learnership Agreement including but not limited to:
 - Selection and or making use of the services of an accredited training provider with the scope of accreditation to design, deliver and assess against the prescribed qualification for the duration of the programme
 - Submission of signed learnership agreement or skills programme agreements in the prescribed format and with the required supporting documentation to the W&RSETA
 - Uploading learner agreements on the W&RSETA Seta Management System (SMS)
 - Provide the facilities and resources required for the specified practical workplace experience activities of the learnership and skills programme;
 - Provide the learner with supervision, mentoring and coaching at work;
 - Provide the learner with appropriate education and training to competently perform the specified workplace experience activities required by the learnership or skills programme;

- Release the learner during normal working hours to attend off-the-job structured learning required by the learnership or skills programme;
- Conduct on-the-job assessment for the specified workplace experience activities, or cause it to be conducted;
- Keep up to date records of workplace learning and periodically discuss progress with the learner and the training provider;
- If the learner was not in the employment of the employer at the time of concluding of the learnership or skills programme agreement -
 - enter into a contract of employment with the learner for the duration of the learnership;
 - advise the learner of the terms and conditions of his or her employment, including the learner allowance; and
 - advise the learner of the employer's workplace policies and procedures.
- Pay the learner the agreed learner allowance of R1500-00 per month for the duration of the learnership or skills programme on a monthly basis;
- Apply the same disciplinary, grievance and dispute resolution procedures to the unemployed learner as to any other employee;
- In addition to the above, ensuring that the following duties are performed by the Training Provider appoint by the Employer:
 - provide the structured learning specified in the learnership or skills programme;
 - provide the learner support as required by the learnership or skills programme;
 - record, monitor and retain details of the education and training provided to the learner in terms of the learnership or skills programme and periodically discuss progress with the learner and the employer;
 - conduct off-the-job assessments for the structured learning component specified in the learnership or skills programme, or cause it to be conducted;
 - ensure that the assessment against the outcomes of the qualification associated with the learnership or skills programme is conducted at the end of the learnership or skills programme;
 - Uploading of results on to the Seta Management System (SMS) by the Training Provider within 10 working days of the results having been internally moderated.

Please note:

The Learning programmes cannot start unless all requirements are met to the satisfaction of the W&RSETA by the participating constituent organisation and their appointed provider.

In the unfortunate instance whereby requirements / criteria are not met by the constituent organisation and or appointed provider, the W&RSETA will allow the

participating organisation 12 working days to provide proof of the required documentation.

In the unfortunate instance of failure to provide the above proof your application will be summarily rejected.

In the instance where all requirements were met the allocation is made in the form of a Management and Delivery Contract.

This Management and Delivery Contract must be signed by the Organisation and returned to the W&RSETA for their signatures.

Please ensure proper selection processes are in place seeing that no learners can be replaced on any Learning Programme.

A copy of the contract duly signed by both parties will be returned to the Organisation and upon receipt thereof, the learning programme can be started.

4. PAYMENT STRUCTURE

The following criterion is applicable **prior** to any Disbursement of Grants and it is important to note that:

- Disbursements can only be made once all requirements were met.

Learnerships (per learner):

Type of learner	Invoicing period	Learner Allowance	Payment Requirement for the Learner Allowance	Management and delivery per Learner	Payment requirement for Management and Delivery:
18.2	1- Start	R6000-00	<ul style="list-style-type: none"> • Learnership agreement duly registered • Employment contract • ID copy per learner 	R3750-00	<ul style="list-style-type: none"> • Management and Delivery Contract signed by the organisation and the W&RSETA. • Rollout plan (integrated with mentorship plan) approved • Learner verification by W&RSETA
	2- 2 nd Quarter	R6000-00	<ul style="list-style-type: none"> • Proof of payment of stipends for previous months verified by the W&RSETA Coordinator via a quarterly monitoring report 	R3750-00	<ul style="list-style-type: none"> • Quarterly report submitted by the Employer • 30% of programme completed and uploads done on the SMS
	3- 3 rd Quarter	R6000-00	<ul style="list-style-type: none"> • Proof of payment of stipends for previous months verified by the W&RSETA Coordinator via a quarterly monitoring report 	R3750-00	<ul style="list-style-type: none"> • Quarterly report submitted by the Employer • 70% of programme completed and uploads done on the SMS
	4- Completion	R0-00	N/A	R3750-00	<ul style="list-style-type: none"> • Quarterly report submitted by the Employer • Certificates approved by the W&RSETA ETQA
18.1	1	R0-00	N/A	R3750-00	<ul style="list-style-type: none"> • Management and Delivery Contract signed • Rollout plan (integrated with mentorship plan) approved • Learner verification
	2	R0-00	N/A	R3750-00	<ul style="list-style-type: none"> • Quarterly report submitted by the Employer • 30% of programme completed and uploads done on the SMS
	3	R0-00	N/A	R3750-00	<ul style="list-style-type: none"> • Quarterly report submitted by the Employer • 70% of programme completed and uploads done on the SMS
	4	R0-00	N/A	R3750-00	<ul style="list-style-type: none"> • Quarterly report submitted by the Employer • Certificates approved by the W&RSETA ETQA

Skills Programmes (Per Learner):

Type of learner	Invoicing period	Learner Allowance	Payment Requirement	Management and delivery	Payment requirement
18.2	1- Start	R6000-00	<ul style="list-style-type: none"> • Skills Programme agreement duly registered • Employment contract • Certified ID copy per learner 	30%	<ul style="list-style-type: none"> • Management and Delivery Contract signed • Rollout plan (integrated with mentorship plan) approved • Learner verification
	2 - Completion	R0-00	N/A	70%	<ul style="list-style-type: none"> • Records of achievement approved by the W&RSETA ETQA
18.1	1	R0-00	N/A	30%	<ul style="list-style-type: none"> • Management and Delivery Contract signed • Rollout plan (integrated with mentorship plan) approved • Learner verification
	2	R0-00	N/A	70%	<ul style="list-style-type: none"> • Records of achievement approved by the W&RSETA ETQA

First payment made on the proviso that, should a learner drop out during the process the Learner allowance amount as well as the Management and Delivery amount will be calculated pro rata and a credit note issued against the next payment for this amount.

5. Implementation milestones:

Milestone	From	Till
Publication of advertisement	13 April 2008	13 April 2008
Compulsory briefing sessions	21 April 2008	25 April 2008
Submission of applications	26 April 2008	16 May 2008
Evaluation of submissions	17 May 2008	11 June 2008
Signing of Service level agreement by successful employers	11 June 2008	23 June 2008

Implementation dates:

Date / Period	1 st Intake		2 nd Intake	
	From	Till	From	Till
Starting window	1 July 2008	30 July 2008	1 August 2008	30 August 2008
1 st Quarter	July 2008	September 2008	August 2008	October 2008
2 nd Quarter	October 2008	December 2008	November 2008	January 2009
3 rd Quarter	January 2009	March 2009	February 2009	April 2009
4 th Quarter	April 2009	June 2009	May 2009	July 2009
Close out	30 September 2009		30 October 2009	

Payment Periods:

Date / Period	Learnership	
	1 st Intake	2 nd Intake
1 st Payment	August 2008	September 2008
2 nd Payment	October 2008	November 2008
3 rd Payment	January 2009	March 2009
4 th Payment	September 2009	October 2009

Date / Period	Skills Programmes
1 st Payment	Start of programme (after 1 July 2008)
2 nd Payment	Completion of programme (before 30 July 2009)

6. Submission Requirements

Submissions must be in the format as prescribed and must contain the following:

1. Application forms (available from the W&RSETA Regional offices and from www.wrseta.org.za)
2. Proof of accreditation of the appointed training provider and scope to design, deliver and assess against the programmes as indicated in the application form. Should the selected programme be on an NQF 5 level or higher then proof of registration with the Department of Education is also necessary.
3. Proof of previous successful implementation of learning Programme (in the instances where learning Programmes have previously been implemented). New learning programme projects will not be allowed to start prior to the completion of previous projects.
4. Proof of registration as a W&RSETA constituent employer through either an SDL number or SMME registration number
5. Submission of a valid, original tax clearance certificate
6. Written confirmation of the commitment to permanently employ at least 90% of the unemployed learners who successfully complete the programme. **(Not casual or temporary employment)**
7. Preference will be given to employers implementing learning programme in areas not mentioned.
8. All Applications must be submitted as follows:
Submission date : 16 May 2008
Time : 12:00
Place : Local regional office

All submissions must be made by hand and/or mail (no faxed, or emailed submissions will be accepted) to the relevant regional office (details of regional offices are available from www.wrseta.org.za. Please ensure that if your application is mailed, that it reaches the regional office on or before the due date since no late submissions will be accepted.

7. EVALUATION PROCESS AND CRITERIA

Commencement of programme is dependant upon full compliance with all required criteria

The following evaluation process and criteria will be used to allocate learners

Evaluation Phase	Evaluation done
Administrative compliance	<ul style="list-style-type: none"> • Verification of submission of all required documentation as per the checklist attached to the application form which inter alia includes: <ul style="list-style-type: none"> ○ Proof of accreditation of appointed training provider as well as the scope to design, deliver and assess against the selected programme as well as registration of the appointed training provider where applicable. ○ Valid original tax clearance certificate ○ Qualifications selected are from the provided list ○ Confirmation of employers to permanently employ 90% of 18.2 learners who successfully complete their programmes (Please note: Casual and temporary employment is not permanent employment) ○ Medium, large and small organisations qualifying i.t.o the SDLA to pay a skills development levy have submitted a WSP and ATR for the 2007/2008 year and this WSP and ATR has been approved. ○ Submission fully completed and signed by the authorised signatory ○ Track record in terms of success rate and participation for participants who participated previously ○ Demographic and geographic spread of learner placements
Workplace Evaluation	<ul style="list-style-type: none"> • Evaluation of workplaces for new applicants and previous problematic organisations as per the workplace evaluation tool

Evaluation Criteria and Scoring

Criterion	Submission requirement	Critical criterion?	0	1	2	3
Employer is a registered organisation of the W&RSETA	Proof of constituency	Yes	N/A	N/A	N/A	N/A
Employer has submitted a WSP and ATR for the 2007/2008 period if applicable and it has been approved	<ul style="list-style-type: none"> • SDL number or • SMME registration number 	Yes	N/A	N/A	N/A	N/A
Appointed training provider has the scope of accreditation to design, deliver and assess against the chosen programme and is registered with DoE where applicable	Proof of accreditation and scope and proof of registration with DoE	Yes	N/A	N/A	N/A	N/A
Selected learning programmes form part of the indicated list	Application form	Yes	N/A	N/A	N/A	N/A
Confirmation of employers commitment to employ 90% of the 18.2 learners that successfully completes on a permanent basis (no casual or temp employment)	Commitment letter signed by the authorised signatory	Yes	N/A	N/A	N/A	N/A
Confirmation of employer to provide workplace mentorship and coaching for learners	Mentorship strategy	Yes	N/A	N/A	N/A	N/A
Workplace conduciveness to learning	Workplace evaluation	Yes	N/A	N/A	N/A	N/A
18.2 learners younger than 35	Application form	Yes	N/A	N/A	N/A	N/A
Track record in previous learning programme implementation	Proof of track record	No	Less than 50% of learners completed previous programmes successfully/	50% - 70% of learners completed previous programmes successfully	71% - 90% of learners completed previous programmes successfully / No previous participation	90%+ of learners completed previous programmes successfully
Geographic spread of learners	Indication of planned geographic spread* in application form	No	Not included in submission	Learners only placed in GP, WC and KZN	Learners placed in metropolitan as well as other areas	Learner placement only in FS, Lim, Mpu, NC and EC
Demographic spread	Application form	No	0% learners with disabilities	1% learners with disabilities	2% - 3% learners with disabilities	4%+ learners with disabilities

*No more than 10% variance will be allowed between applied geographical spread and implemented geographical spread i.t.o. learner placement