

Membership Benefits

Frequently Asked Questions on the Training and Continuous Professional
Development Programme



Introduction

The purpose of the Frequently Asked Questions (FAQ) is to provide you (members of Batseta) with information about the way in which Batseta supports the upskilling and professional development of trustees and principal executive officers within the retirement fund industry. Such support is made up of providing management structures for funds to plan, record, monitor and report on their training and development activities. Batseta provides tools to identify skills gaps, quality assures activities of external service providers and offers default programmes where they are needed.

What is the role of Batseta in assisting funds to meet their training and development needs?

Pension law requires that trustees and Principal Executive Officers undergo training and development and maintain their competencies. In order to maintain competencies, these fiduciaries have to follow a Continuous Professional Development (CPD) plan. The plan will require a certain number of training hours over a period of time.

Batseta is a registered professional body with the South African Qualifications Authority (SAQA)¹ that oversees the professional development of Principal Executive Officers. Batseta has been delegated by the Quality Council for Trades & Occupations (QCTO)² to be the Assessment Quality Partner (AQP) for the occupational qualifications registered by SAQA for principal executive officers as well as the qualification that is under development for trustees. Batseta offers support to funds and their trustees to achieve this.

How do you determine where to focus your training and development?

Batseta offers an on-line skills gap analysis tool (survey) that assesses the skills of the board of trustees on a collective level as well as those of the individual trustees. The survey highlights areas of development in eight broad categories. These categories mirror the scope, depth and breadth of the duties, roles and responsibilities of trustees. Participants also have an opportunity to indicate in which of these categories they would like refresher training. The survey provides guidance as to how training

¹ SAQA is a government institution that is tasked to recognise professional bodies and to register professional designations in terms of the NQF Act of 2008.

² The role of the QCTO is to oversee the design, implementation, assessment and certification of occupational qualifications on the Occupational Qualifications Sub-framework (OQSF).

plans can be tailor-made for the board as a collective or for individual trustees and principal executive officers.

Benefit: Training and development plans focus on and address real skills gaps.

Can a fund determine its own training and/or CPD plan?

Yes, a fund is responsible for its own training and development planning. The fund may opt to put their own plan together or they may use the Batseta default option. Batseta presents a number of events throughout the year where networking and learning opportunities are available. Batseta events are hosted in Durban, Cape Town, Johannesburg and Port Elizabeth.

Benefit: Funds have options to choose from in the design of a training and development plan. The Batseta default option is current and relevant.

Can Batseta assist you to manage your training and CPD plans?

Yes. You (funds, trustees and principal executive officers) have access to a Management Information System (MIS). It is a comprehensive electronic system that manages various aspects of the membership. One of the key functionalities relates to the management of training and CPD activities of retirement funds.

The MIS system allows for the upload of the individual (trustee and principal officer) as well as collective (board) training and development plans. The MIS captures the various types of planned activities, assigns hourly based credits to indicate the time spent, schedules dates and times, and record learning achievements.

Benefit: It is an all-in-one solution that manages all learning activities in real time at one central point.

How do you monitor training and development activities?

The MIS system gives you an on-line monitoring functionality. All participants have 24/7 access to the system and are therefore able to track their own progress and pace. If need be activities may be adjusted, changed or added in order to align with your pace and abilities.

Benefit: You have any time access to your training and development programme.

What types of reports are available on the MIS system?

Various types of on-line reports are available. You can track and verify progress made with the implementation of your training and development plan. The reports contain information about the types of activities you have registered for, the progress you have made as well as the extent and scope thereof. Reports are available at individual as well as fund level.

Benefit: These reports serve as a tool for future planning and allow you to reflect on the efficacy of your plans.

How will Batseta quality assure training and CPD activities and content?

Batseta will invite all training providers to submit applications to validate their training and CPD activities and content. All these activities will be assessed against predetermined criteria. Once done these providers will be issued with a validation number and certificate. They may use the Batseta logo and validation number on their training material.

Benefit: All external learning activities are validated by an independent organisation

How will you know that a training provider is accredited?

Batseta will publish a list of service providers together with their training and development offerings and validation number.

Benefit: This is a quick way to establish whether the training and development activities have been validated.

Membership application

Join us now to benefit from this service offering. It is easy to do so. Complete the membership form [here](#).

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Membership

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