Consolidated Report
CHIETA Customer Satisfaction Survey on the Mandatory & Discretionary Grant Online Application System

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1 Introduction

The CHIETA introduced the electronic WSP-ATR source data online application system in 2011-2012, and has been utilising the system since then. For the first time in 2013-2014, CHIETA introduced an online process for the submission of Discretionary Grants and Strategic Projects, based on WSP-ATRs submitted electronically. This was done in order to support the implementation of new grant regulations promulgated by the Department of Higher Education and Training on 3 December 2012, and to improve the quality of the WSP-ATR data provided by employers / enterprises.

The Grants Review Committee of the CHIETA requested that a customer satisfaction survey be conducted in order to test perceptions of the online application system amongst both external (employers/enterprises) and internal (CHIETA staff) users. In drafting the survey, consideration was also given to the COBIT5 Control Framework, a business framework for the governance and management of organisations' information technology (IT). The survey was conducted in three parts: in relation to external users, a first questionnaire was sent in early March 2014, and covered questions relating to the Mandatory Grant System, two of the four phases of the Discretionary Grant System, and the functioning of Skills Development Committees. At the time of conducting the surveys, customers had not interacted with the third and fourth phases of the Discretionary Grant System, so it was decided to send a very brief survey to all those who had responded to the first survey, asking them about their experience of these latter phases. This second survey was conducted in May 2014. In May, internal users were also surveyed about the mandatory and discretionary grants systems. This report covers the responses to all three of the surveys.

2 Methodology

All of the surveys were designed in collaboration with the CHIETA, and were distributed using SurveyMonkey. Response rates were as follows:

	# sent to	# responses	% response
External Phase 1 survey	1118	250	22%
External Phase 2 survey	250	72	29%
Internal Survey	29	13	45%

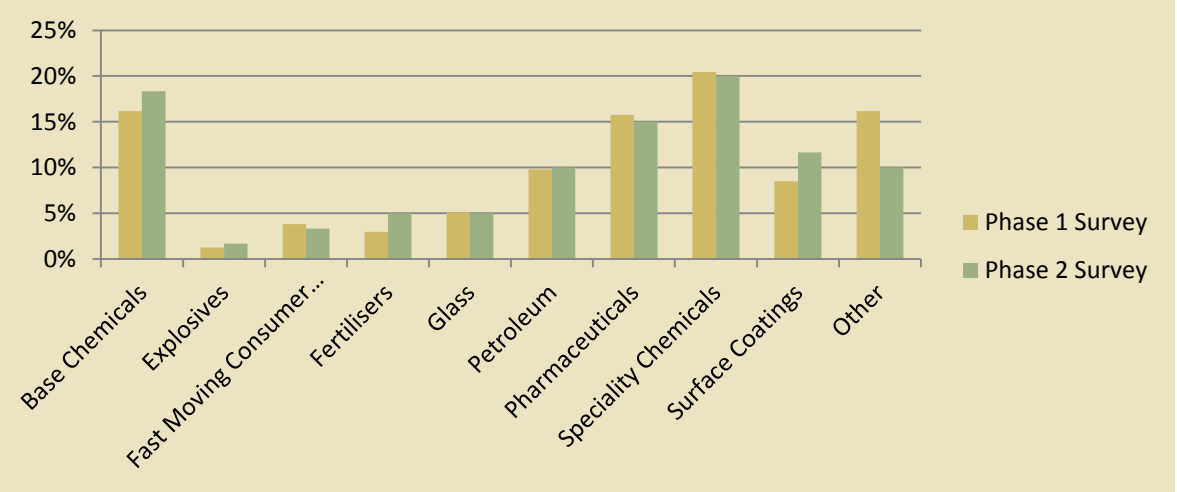
In relation to the External Phase 2 survey, it should be noted that the first question was a self-exclusion question: "Did you submit an online Discretionary Grant Application in 2013?" Only those respondents who answered 'Yes' to this were asked to completed the rest of the survey, so in total there were 60 people who completed the survey in full. The External Phase 1 survey was piloted with eight SDFs at the Gauteng Regional Skills Forum prior to being sent to respondents, all of whom had submitted an online application either for a Mandatory Grant, a Discretionary Grant or Strategic Project Grant in 2013/2014. As indicated above, the External Phase 2 survey was then sent to all those who had completed the External Phase 1 survey. The surveys are included as Annexures to this report.

In reviewing the results of these surveys it should be noted that the Phase 1 external survey was conducted a year after respondents would have actually engaged with the online application system, which means that they may not have remembered all aspects of engaging with the system. It is also noted that many companies use external SDFs (private contractors) who may not have responded to the requests to complete the survey.

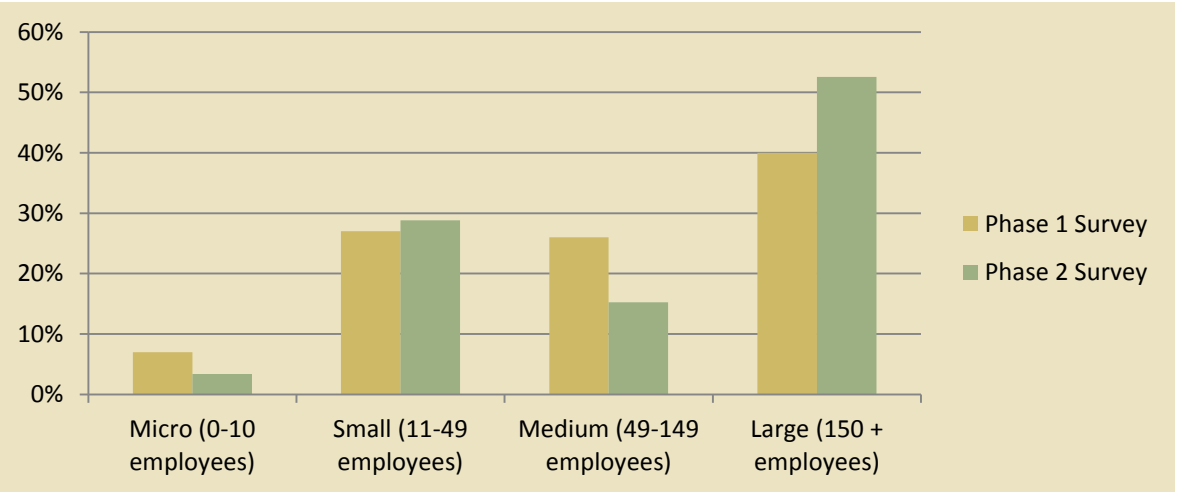
3 External Phase 1 & 2 Surveys

3.1 About the Respondents

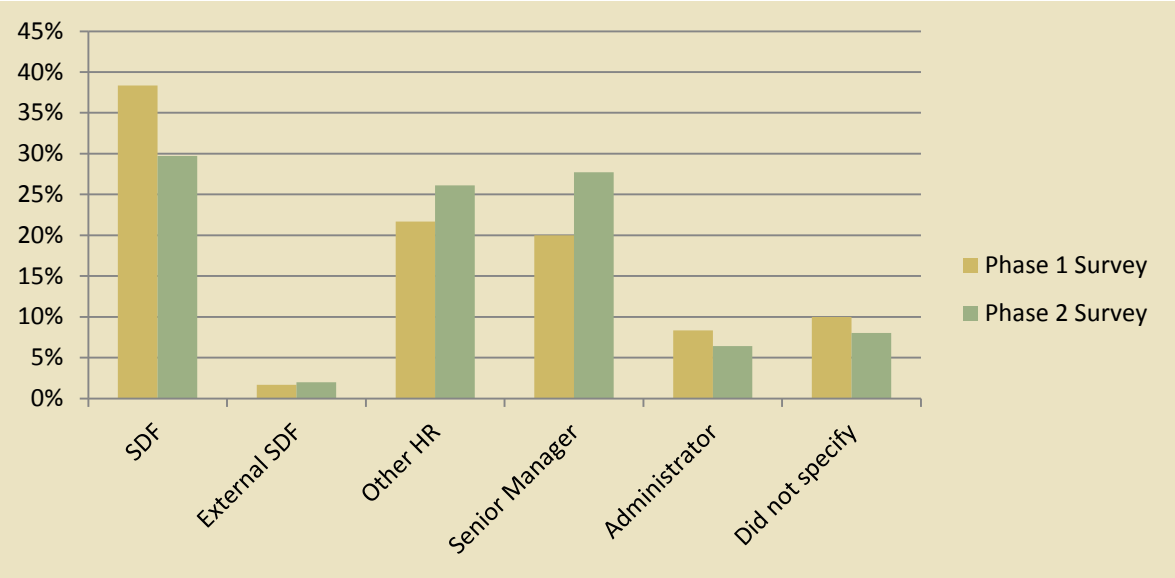
In the External Phase 1 survey, 88% of respondents were from CHIETA levy paying companies and the balance were Public & Private E&T providers, NGOs, and one Government Department. In the External Phase 2 survey, 92% of the respondents who answered this question were from CHIETA levy paying companies, with two public FET Colleges responding and three respondents selecting 'other'. In both surveys, there was a good spread across subsectors, as shown in the diagram below:



There was also a good spread across Provinces in both surveys. In terms of the size of the organisations which responded, the diagram below shows that proportionally more large organisations completed the External Phase 2 survey:



With regard to who completed the survey, the diagram below shows that proportionally more SDFs completed the External Phase 1 survey than the External Phase 2 survey:

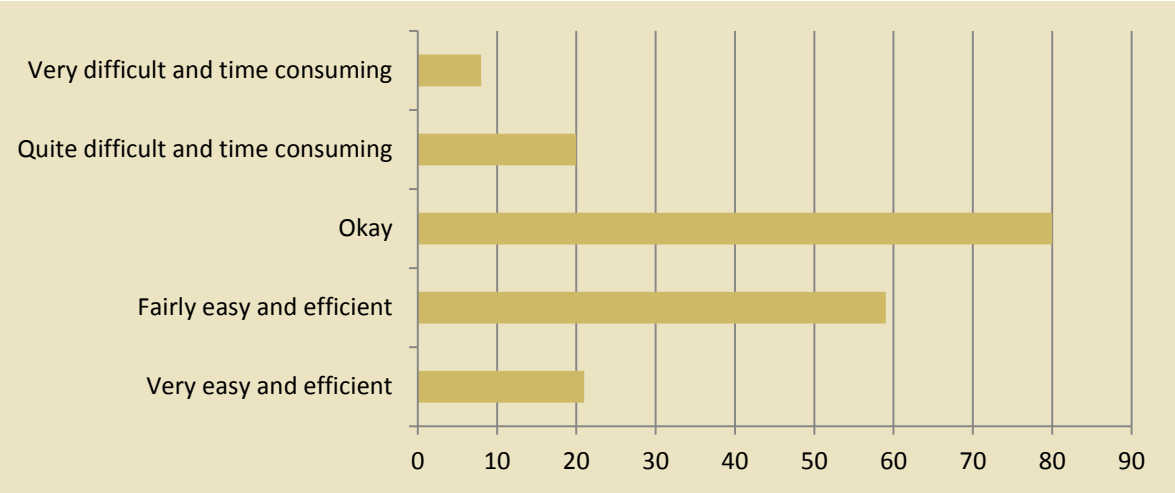


3.2 Respondents' Views on the Mandatory Grant System

Note that all the responses in this section are taken from the External Phase 1 Survey.

3.2.1 Overall Views on the Mandatory Grant System

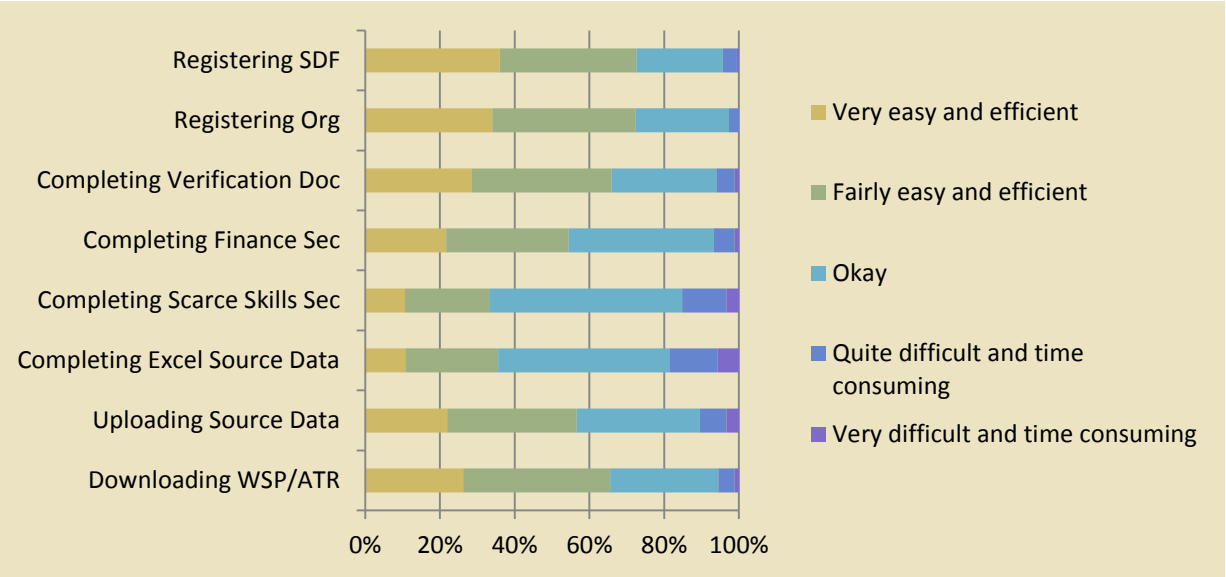
91% of respondents (who answered this question – 243) had applied for a MG. The diagram below shows the 43% said they had found the process 'very' or 'fairly' easy and efficient, and 40% said it was 'okay'.



Those who found it 'quite' or 'very' difficult spoke about it being 'time consuming' and 'confusing'. Two respondents indicated that there were problems articulating between their internal systems and the CHIETA system.

3.2.2 Views on the different stages of the Mandatory Grant System

Respondents were then asked to rate their satisfaction levels with each of the stages of the Mandatory Grant Online Application System. As seen in the diagram below, generally satisfaction levels are fairly high across all stages in the process, with most respondents selecting very or fairly easy and efficient, and okay.



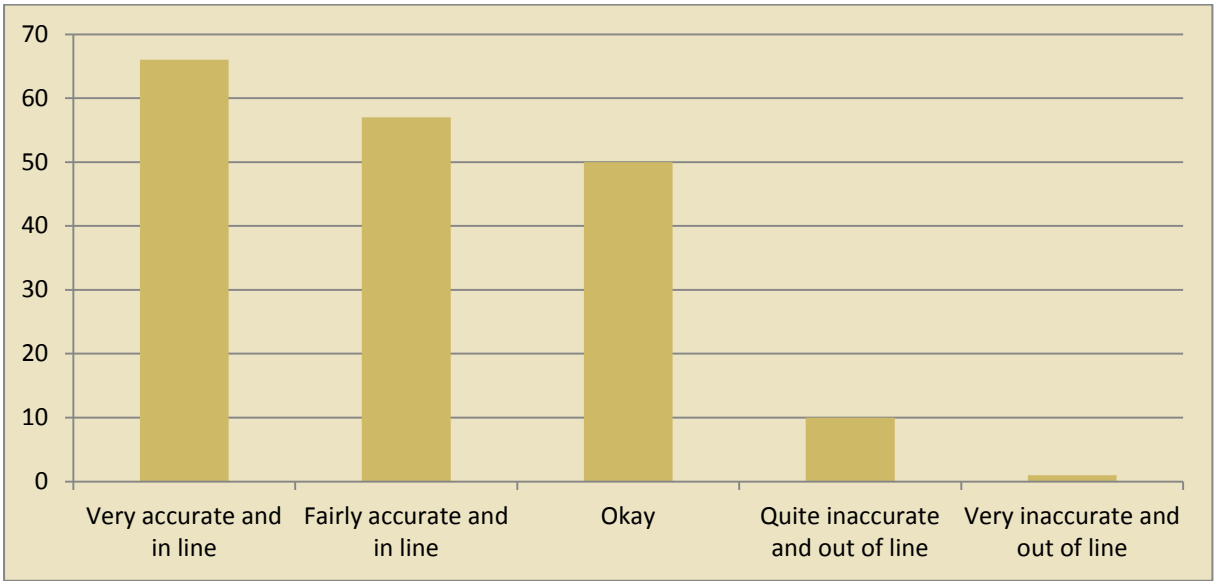
The only areas in which respondents seemed to experience some difficulty were in completing the scarce skills section and the Excel source data, and in uploading the source data. In relation to scarce skills, most concerns related to difficulties in matching OFO codes to internal job titles, but there is some evidence of a lack of understanding of the concept of 'scarce skills'. Only one technical problem was mentioned. With regard to completing the Excel source data section, respondents who found this quite or very difficult and time consuming generally indicated that they found the process very laborious, particularly for large organisations. There were, however, some technical problems noted in this stage, including:

- Compatibility with different versions of Excel
- Fixed column widths and no ability to hide columns
- Descriptions of training courses difficult to understand
- Document not responding to commands

In relation to uploading the source data, two respondents mentioned the lengthy error reports and the time it took to generate them, while a few mentioned difficulties with finding the upload button, getting the data uploaded and the website timing out while trying to upload.

3.2.3 Views on the Accuracy of the Reports Generated

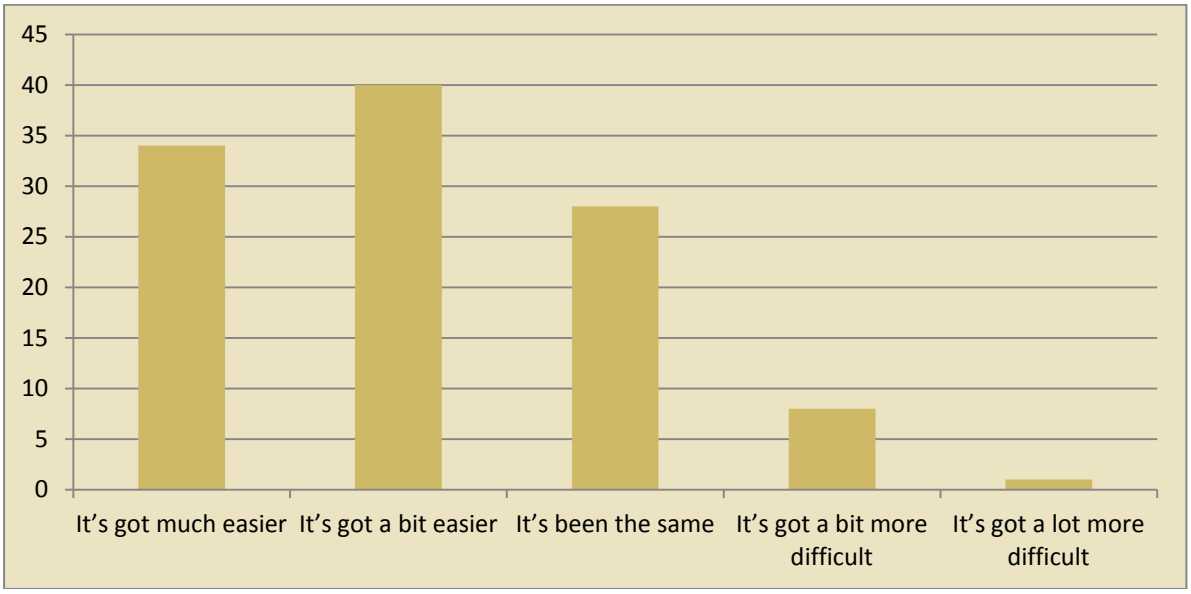
Respondents were then asked how accurate they thought the PDF report generated was. As shown in the diagram below, 63% of respondents thought that it was very or fairly accurate and in line with the data they had submitted.



Those who selected quite or very inaccurate indicated that the totals did not match, although one noted that they had found it difficult to compare the spreadsheet and the PDF information so it might have been accurate but they couldn't tell.

3.2.4 Concluding Comments on Mandatory Grant Online Application System

Those who had submitted a Mandatory Grant Application more than once were asked if they thought it had got easier over time. As shown below, 67% of respondents thought that it had got much easier or a bit easier, while 23% thought that it had stayed the same



In general and as noted above, satisfaction levels are fairly high with regard to the Mandatory Grant Online Application System. Completing the Excel Source Data and Scarce Skills sections gave respondents the most problems, but even these numbers are quite low. There are a few technical problems with the system itself, which may need ironing out, and particularly the excel sheet could probably be made more user friendly.

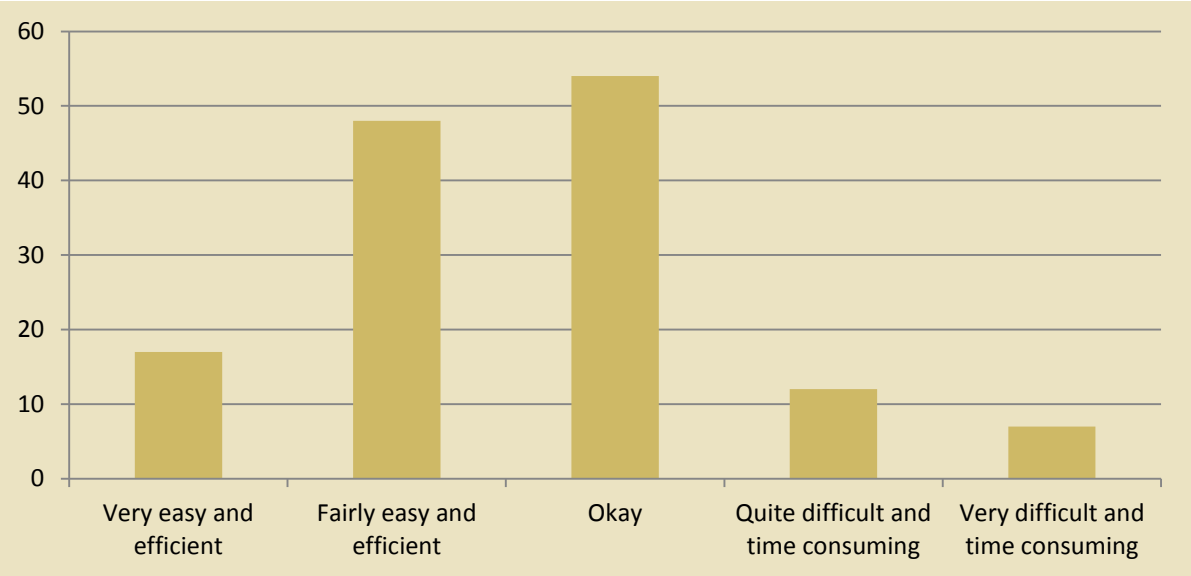
A number of respondents indicated that the problems were internal to their organisations, or that they had struggled initially but were confident it would get easier. There are some general 'knowledge' gaps which the CHIETA could look at filling, particularly around scarce skills and the OFO codes: how to 'match' these more accurately to internal job titles.

3.3 Respondents' Views on the Discretionary Grant System

3.3.1 Overall Views on the Discretionary Grant System

Note that responses in this section are taken from the External Phase 1 Survey.

141 respondents indicated that they had applied for either a Discretionary Grant or a Special Projects Grant. As shown in the diagram below, these respondents are also generally satisfied with the Discretionary Grant Online Application System: 47% indicated it was 'very' or 'fairly' easy and efficient, and 39% indicated it was okay.

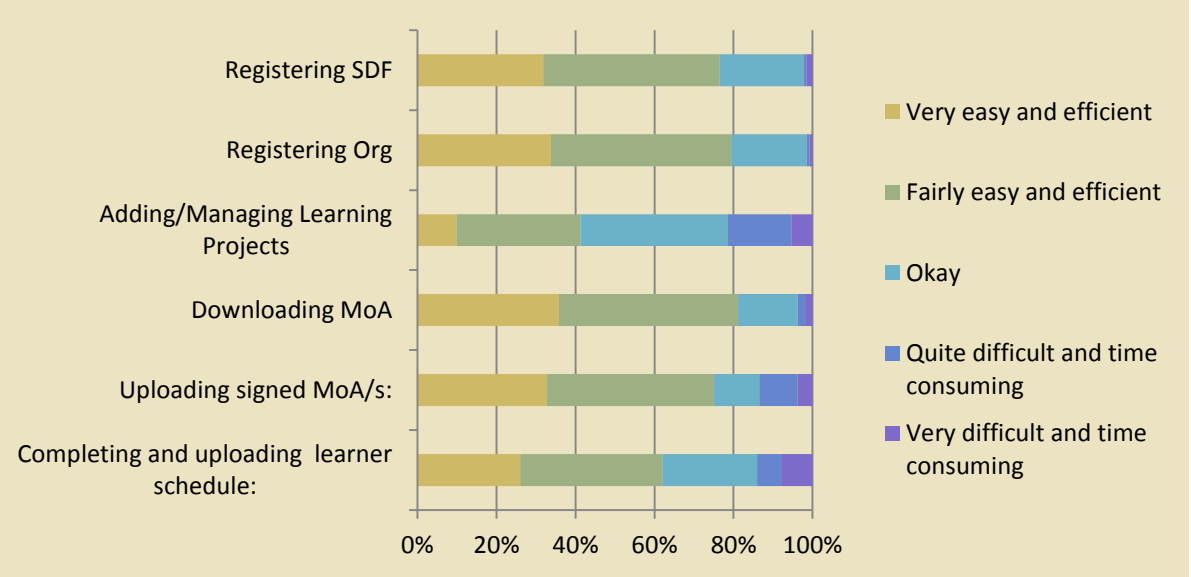


For those respondents who found it quite or very difficult and time consuming, most indicated that they felt that the system was not particularly user friendly, and was difficult to navigate. Specific issues raised included the fact that the application summary document for sign off didn't have enough space in the columns to display all the numbers, which was an issue when the MD had to sign off the document. Also that only CHIETA trades were included in the system, and that the data fields are set up as generic, it is not always possible to capture the applications correctly. One respondent also indicated that they felt that they should only have to provide the name of the service providers used and all other information should come from the CHIETA database.

3.3.2 Views on the different stages of the Discretionary Grant System

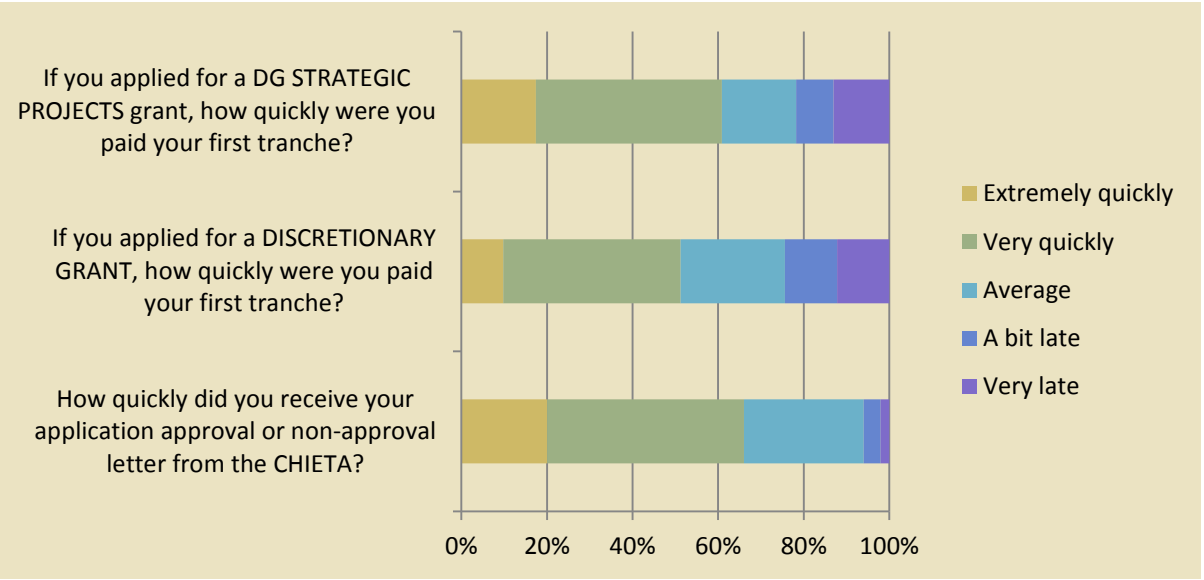
Note that responses in this section are taken from the External Phase 1 AND External Phase 2 Surveys and so the data is presented as percentages in order to accommodate the different numbers of respondents in the two surveys.

As seen below, respondents were generally happy with all stages of the Discretionary Grant Online Application System.



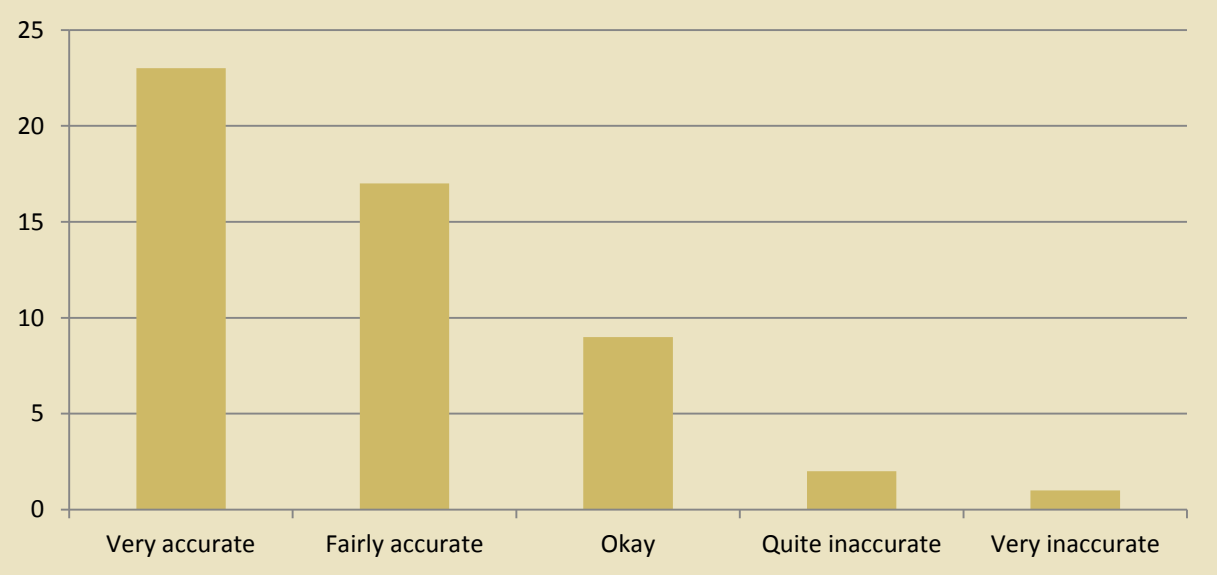
The areas where people struggled were with adding and managing learning projects and with completing and uploading the learner schedule. In relation to adding learning programmes, some problems were noted with generating the PIVOTAL report. One suggestion was that ongoing projects should have a separate section where current information can be stored. Another suggestion was for the inclusion of a text box to allow people to put comments in for later reference. One respondent indicated that there was a lot of inconsistency between the actual application and the report generated, and the issue of multiple MoAs was also raised as a concern. With regard to completing and uploading the learner schedule, the main concern raised was relating to the number of records and level of detail that was required.

Respondents were then asked how quickly they received a response from the CHIETA, either in the form of correspondence or payment, once they had completed the Discretionary Grant Application procedure. As shown in the diagram over the page, most respondents felt that the CHIETA had acted timeously in responding to them:



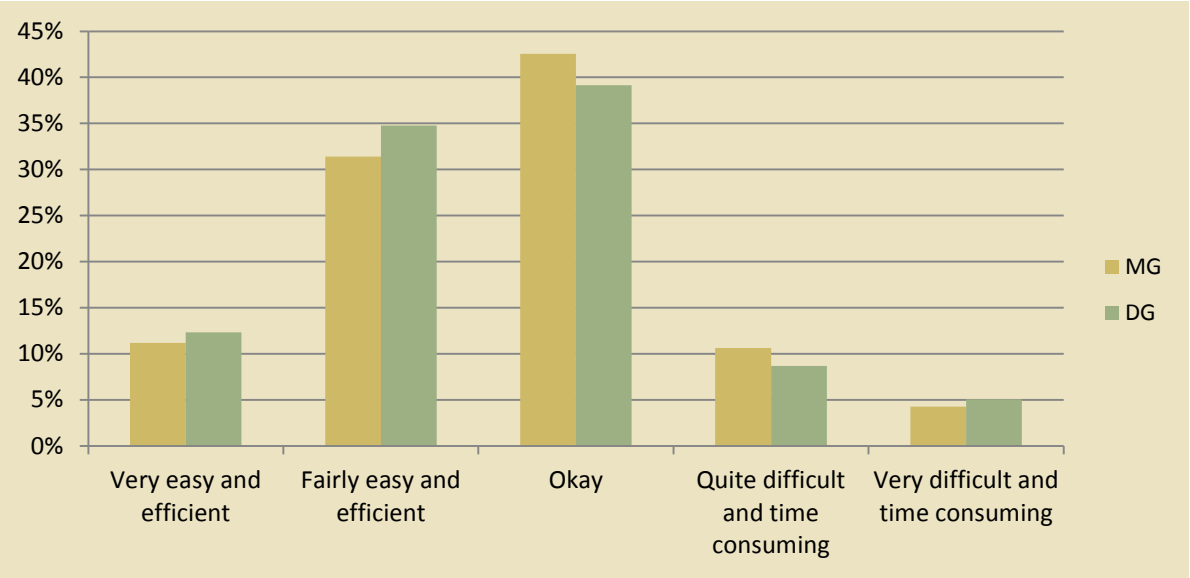
3.3.3 Views on Accuracy of the MoAs

Respondents were then asked how accurate they thought the MoAs generated were against the data that they had uploaded. As shown in the diagram below, most respondents felt that they were very or fairly accurate.



3.3.4 Concluding Comments on Discretionary Grant Online Application System

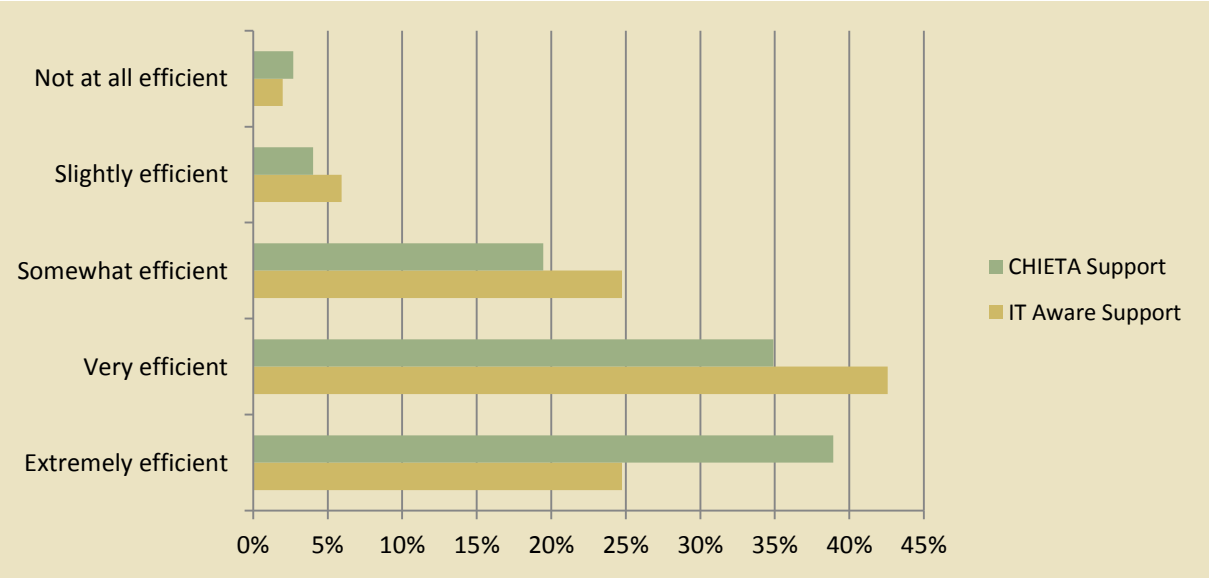
Again, respondents are generally happy with the Discretionary Grant Online Application System. The diagram below shows a comparison between respondents' views on the Mandatory and Discretionary Grants systems:



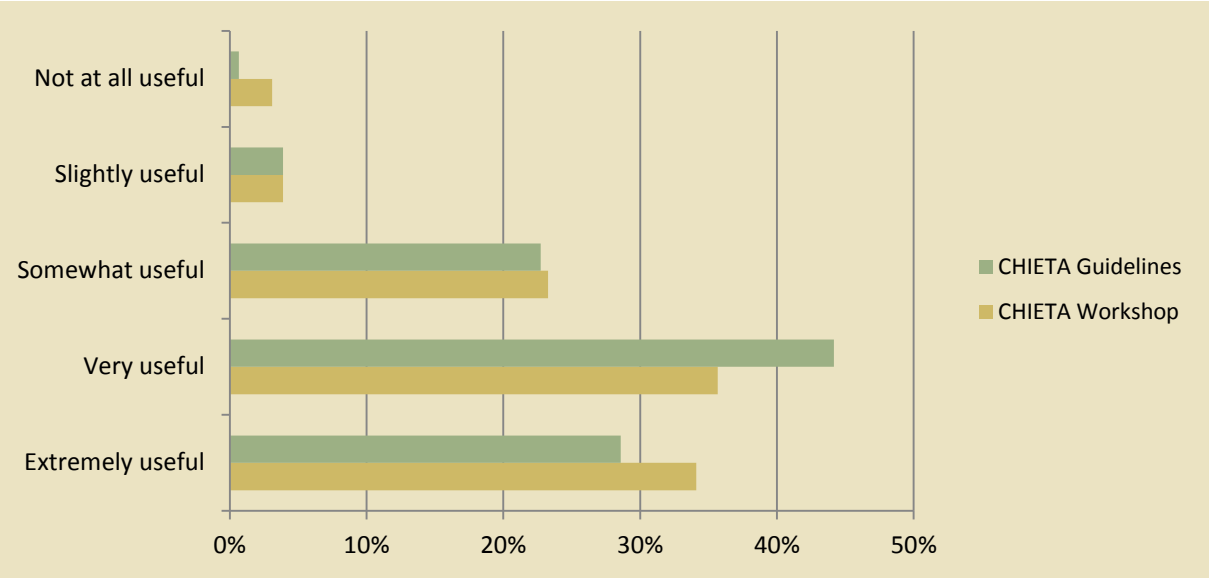
It shows that respondents found the Discretionary Grant system slightly easier than the Mandatory Grant system, but overall, most users are satisfied.

3.4 Views on Support Provided in Using the System

Respondents were asked if they had used the IT Aware HelpDesk or got direct support from the CHIETA in using the system. Those that had were then asked to rate the quality of the service which they had received. The diagram below shows that users are generally happy with the services received.



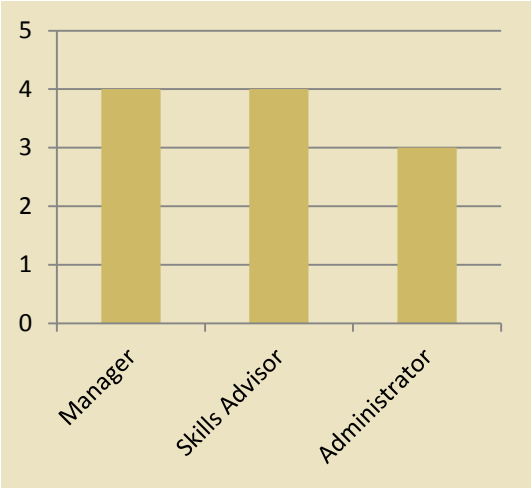
Respondents were then asked if they had used the CHIETA Guidelines or attended a CHIETA workshop on the System, and those that had were asked to rate the usefulness of them. As seen below most users found them extremely or very useful.



4 Internal Survey

4.1 About the Respondents

11 of the 13 respondents indicated their occupational category – as seen in the diagram to the right, four respondents were Managers, four Skills Advisors and three Administrators.



Two of the 13 respondents were from Head Office, and 11 from the Regional Offices: six from Gauteng, four from KZN and one from the Western Cape.

Respondents were then asked an open-ended question about what they did in relation to the mandatory and discretionary grant on-line application system. In relation to the mandatory grant system:

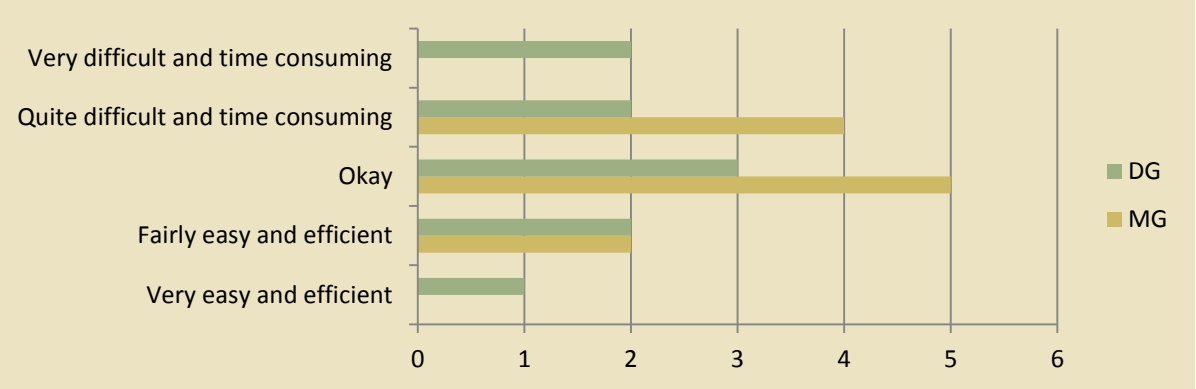
- 10 respondents indicated that they support stakeholders to complete the application;
- Four said that they reviewed and approved applications;
- Three said that they analysed data on the system & generated statistical reports; and
- One indicated that they resolved technical (IT) issues.

In relation to the discretionary grant system:

- 10 indicated that they support stakeholders;
- Six said that they reviewed and approved applications;
- Three said that they monitored implementation;
- One said that they analysed data; and
- One said that they resolved IT issues.

4.2 Respondents' Overall Views on the System

Respondents were asked how they thought external users viewed the mandatory and discretionary grants on-line application system. As shown in the diagram below, internal users showed a fairly mixed response to this question: five respondents thought that external users found the discretionary grant system okay or fairly easy and efficient, while one thought that external users found it very easy and efficient. In relation to the mandatory grant system, seven respondents thought that external users found it okay or fairly easy and efficient.



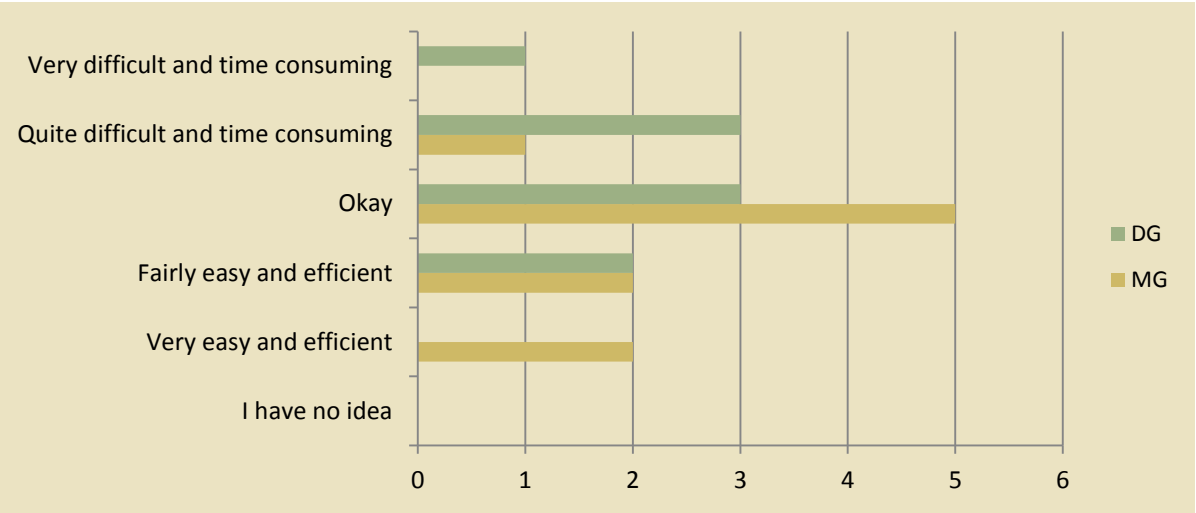
On the other end of the spectrum, and in relation to the Discretionary Grant system, two respondents thought that external users found it very difficult and time consuming, while a further two thought it was quite difficult and time consuming. No respondents thought that the mandatory grant system was very difficult and time consuming, but four felt that it was quite difficult and time consuming.

Those that selected the options of fairly or very difficult and time consuming were asked to provide reasons for their response. In relation to the discretionary grant system, of those internal users who selected 'very' or 'quite difficult and time-consuming', one indicated that they had selected the option because they thought external users had found it time-consuming, while another said that they felt that they had been unable to supply adequate support to external users as the system had been introduced to RSFs and to clients at the same time, and so they were unable to answer queries etc.

In relation to the mandatory grant system, internal users felt that external clients found it time-consuming and in some case indicated that the templates were not very user friendly. One internal respondent noted that using the system required a high level of computer literacy, which many SDFs did not have, and also that there were problems of compatibility between clients' internal systems and the IT Aware system. One of the most detailed responses from an internal user is reflected below:

For those SDFs who were exposed for the first time the entire process was very confusing and time consuming and they required extensive face-to-face, step-by-step support. However this should improve with exposure and practice. Overall the more experienced SDFs reported that the CHIETA system was far more user friendly and less time consuming than many of the other SETA systems. Of the more experienced SDFs, requests for assistance had to do with navigating the system (i.e. "Where do I find ...") - verifying existing organisation and SDF data (for Step 1 of the process); - where do I go to upload my bio-data/source data? - where can I find the source data sheet that I need to complete? - how do I interpret the error report once I have uploaded source data? Knowledge of Excel is generally poor amongst SDF's as they primarily work with other packages in their day-to-day tasks. As a result - a large percentage of companies did not complete tab/ worksheet 2 and 3 and had to re-upload - did not notice and did not use cell drop-down boxes Other issues: - confusion around "error" appearing while working on the source data sheet when there is no error - pop up window for OFO codes - those companies which submitted last year felt they needed a pop up for searching codes, not only job titles. - in a few cases where organisations had copied and pasted from the 2013 bio-data sheet the OFO code pop-up went haywire and pulled up nonsense. - need to emphasise the source data workbook must be zipped in order to upload Many SDFs reported that the reference documents in the "CHIETA Document" section of the system (a) took a long time to download (b) some were labelled incorrectly and thus created frustration.

Respondents were then asked how they themselves had found using the online application system for both mandatory and discretionary grants: as shown in the diagram over the page, internal users are generally more comfortable with the mandatory grants system, with only one respondent finding it 'quite difficult and time consuming'. In relation to discretionary grant system usage, on the other hand, one found it 'very difficult and time consuming' and three found it 'quite' difficult.



One respondent commented in relation to the mandatory grant system that they thought that there was room for improvement, and another indicated that the system can take a long time to run reports. Another respondent indicated the following: *"Personally I found the system very easy once I had the opportunity to practice on it and familiarise myself."* With regard to comments on the discretionary grant system, one respondent indicated that they found it time consuming, while another specifically noted that uploading the learner schedules was difficult on the system.

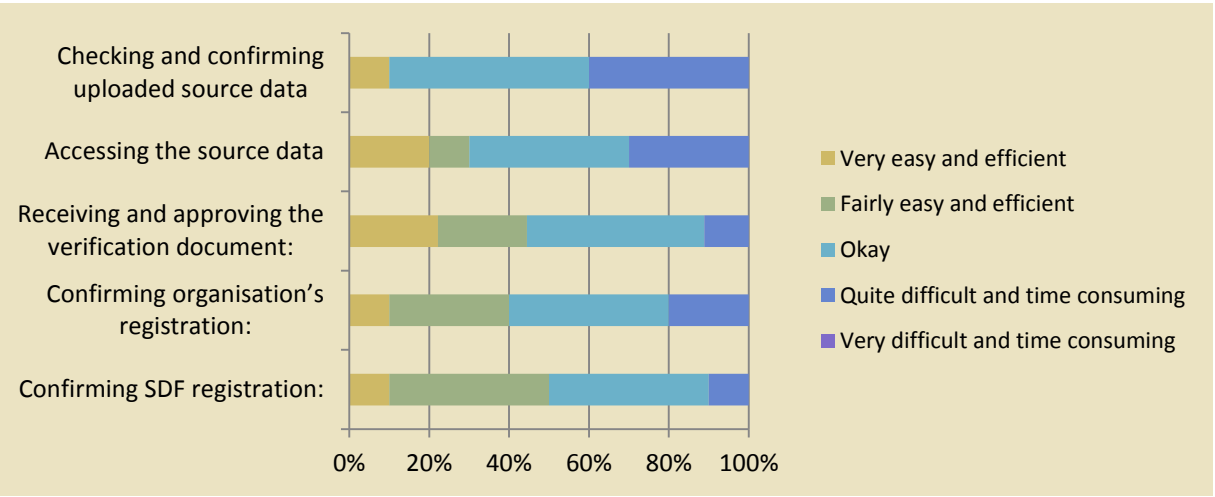
Internal users were then asked what they thought were the best and the worst aspects of the mandatory and discretionary grants systems respectively. The comments in the table below have been reproduced verbatim from the surveys:

Mandatory Grant System		**Discretionary Grant System**	
Best	**Worst**	**Best**	**Worst**
Drop down menus.	Accessing and resolving errors.	1) Should be separated from the MG system. 2) DG is best done manually, either way one will need the supporting documents to initiate evaluations, etc.	1) What the company applies for is not accurately reflected in the approval (or MoA). This results in an appeal process which takes time and eventually if approved, the programs are started late----ends late and then you find the DG cycles are conflicting. Programs cannot be closed within timeframes.
SDF registration	OFO mapping	Application	Downloading/uploading
I wouldn't say best because we do get queries now and again and sometimes as a Region it will be beyond our control so IT Aware will intervene	Capturing on the Source Data and correcting of Error Reports		
None		None	All of it
Verifying	Accessing source data		

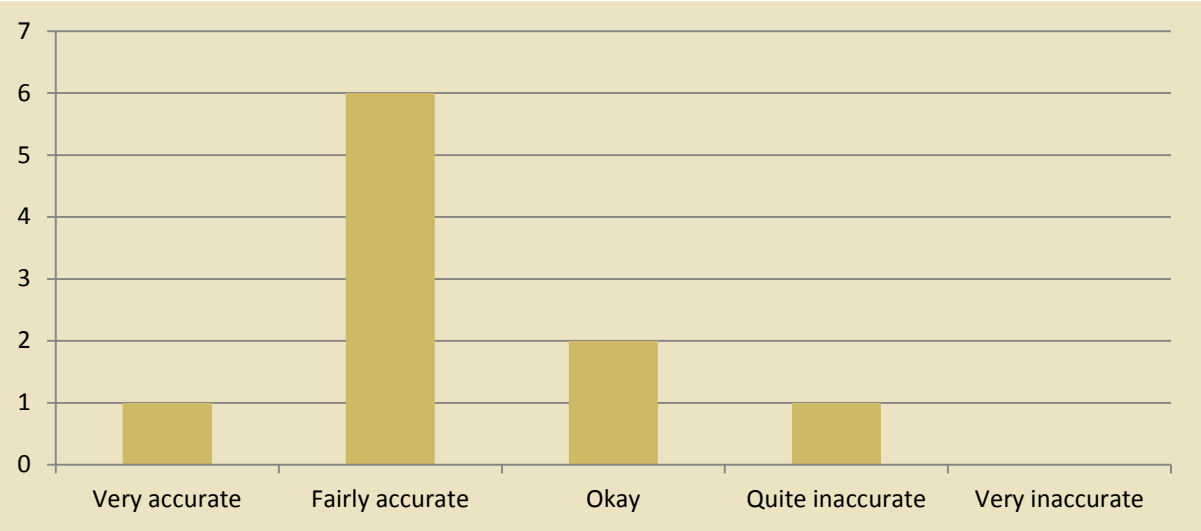
Mandatory Grant System		Discretionary Grant System	
Best	**Worst**	**Best**	**Worst**
The generation of error reports once source data uploaded- very useful and forced organisations to amend data prior to submission. This cuts down the number of WSP queries logged at the WSP Approval phase.	Navigation - where to start, where to find something, what is the next step .... Organisations tended to under-estimate the level of knowledge and time required for completing the source data sheet / bio-data.		
	SDF find it tedious to fill in the source data especially those with many employees	unknown	unknown
All the stages works best except when the system is overloaded when a lot of people happen to use it simultaneously which results in a prolonged period of getting the required results.	Overloading tends to increase the turnaround time for accessing reports.	From the beginning up to the MoA/DG contracting stage.	Uploading of signed DG MoAs as well as the evidence for the tranches to be paid.
Approval	Source data upload	Nothing!	Evaluating applications and uploading learner schedules

4.3 Respondents' Views on specific aspects of the System

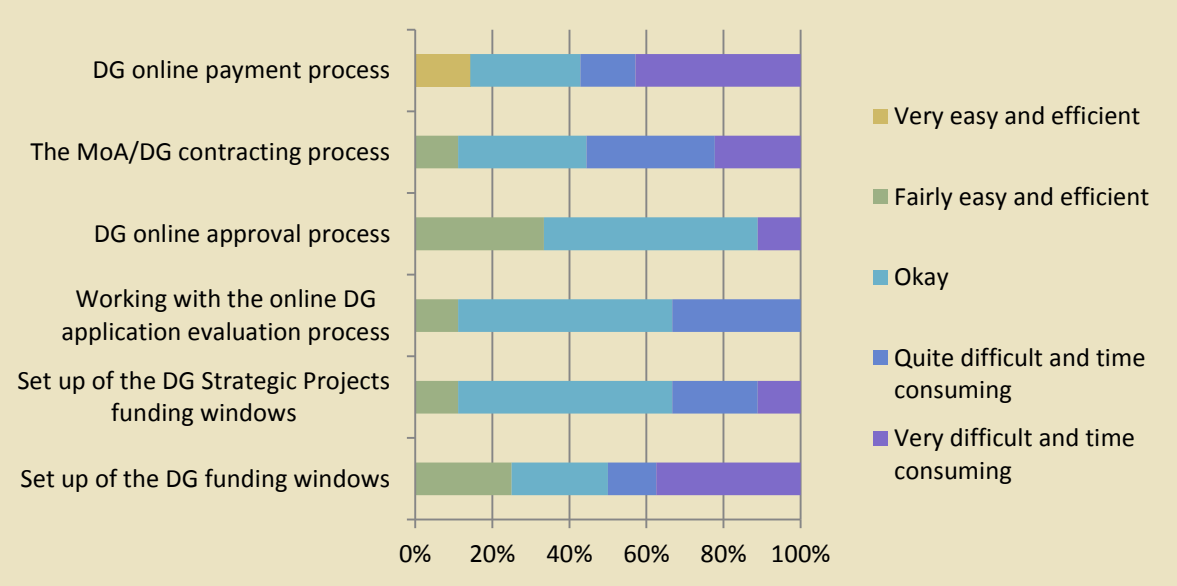
Respondents were then given the opportunity to comment on specific aspects of the mandatory and discretionary grants application system. In relation to the mandatory grants system, and in support of the 'best' and 'worst' comments reflected above, it can be seen that users experience difficulty with checking and confirming uploaded source data (although interestingly, one respondent found this 'very easy and efficient) and with accessing source data. Easiest were seen to be confirming SDF registration and receiving and approving the verification document.



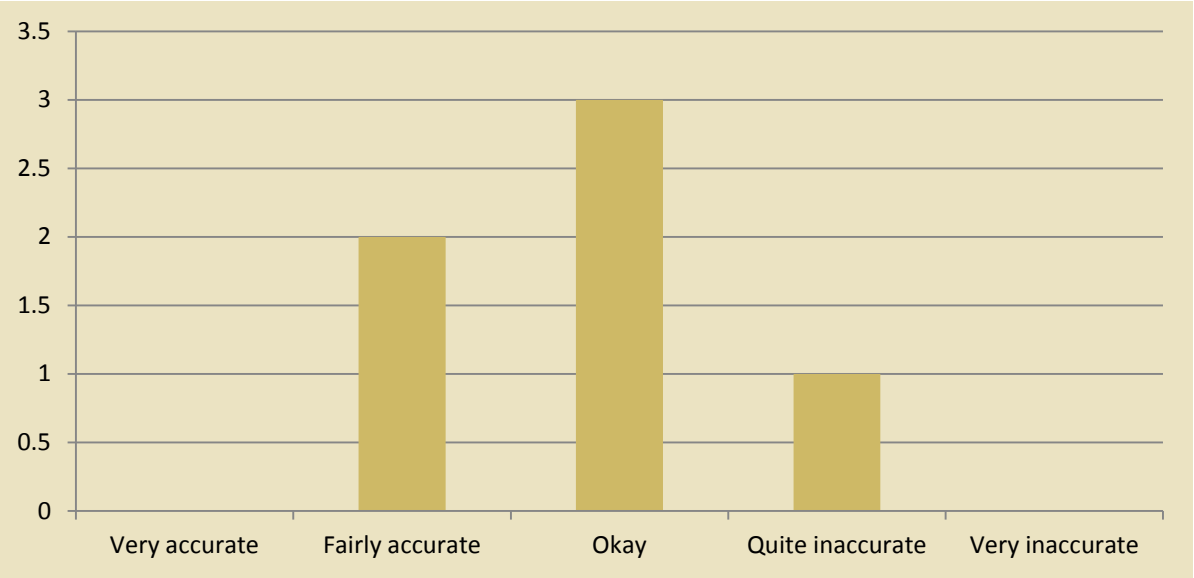
In relation to the accuracy of the reports generated by the online mandatory grant application system, as seen below, 6 out of 11 respondents thought that they were fairly accurate and one thought they were very accurate:



In relation to the various phases of the discretionary grant system, there were a number of areas which users found 'very' or 'quite' difficult and time consuming. Internal users indicated that the DG online payment process was particularly problematic for them (although again, one person found this very easy and efficient), as well as the MoA/DG contracting process and setting up the DG funding application windows.

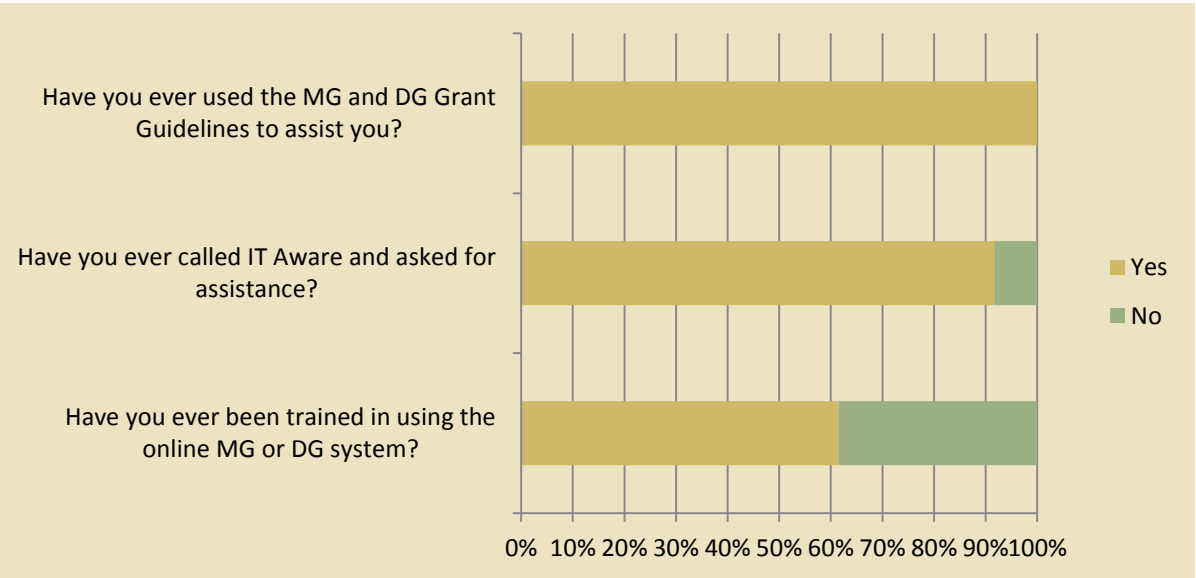


With respect to the accuracy of the reports generated, as seen below, most internal users thought that they were okay or fairly accurate:

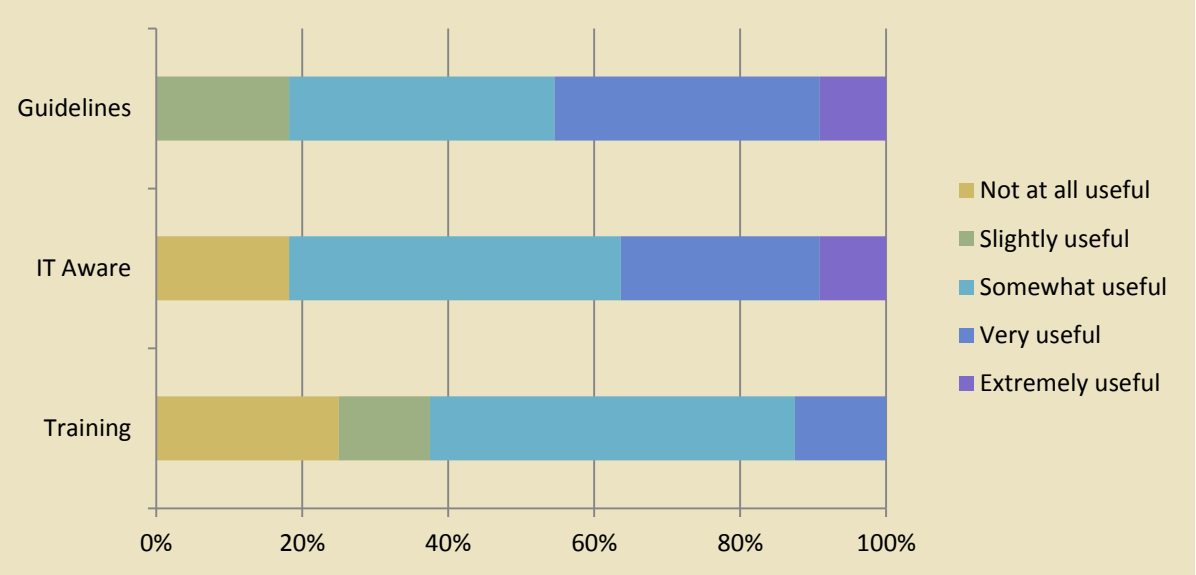


4.4 Respondents' Views on Support Provided

In a final set of questions, internal users of the CHIETA mandatory and discretionary grant online application system were asked whether they had had access to any support in using the system, and what they thought of this support. As shown in the diagram below, internal users are most likely to have used the guidelines for support and least likely to have received training in using the system.



Those respondents who answered 'yes' to any of the above questions were then asked to rate the quality of the support which they had received. As seen over the page, some users found the Guidelines and IT Aware support extremely useful or very useful, but users were less positive about the training received.



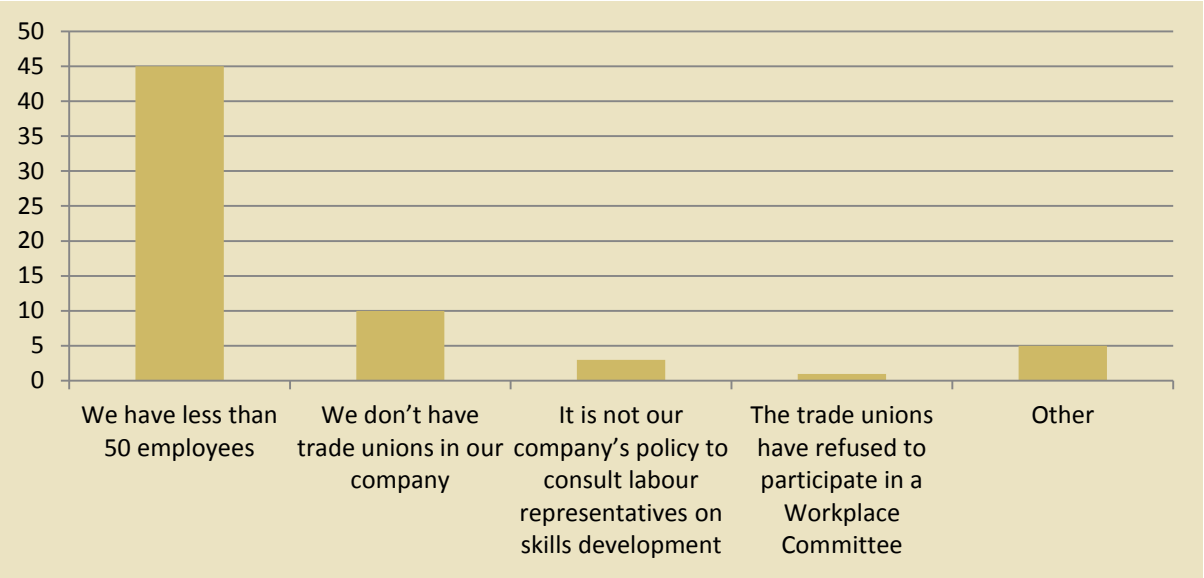
4.5 Concluding Comments from Respondents

In a final, open ended question, internal users were asked if there was anything additional that they wanted included in this report: the responses are shown verbatim below:

- Review how qualifications/occupations and codes were uploaded
- Although big room for improvements, come next year there will be different challenges and to communicate this to participants becomes a "nightmare". I however thank IT Aware for responding to the queries reported and hopefully we can get a better system next year.
- Online system is supposed to take away the paperwork and Administration, an improvement on the online system is needed, everything should be done online.
- The system is not the best to use its still work in progress
- The source data Excel workbook needs to be thoroughly checked for errors before making it public. The use of statements on the finance tab created a great deal of confusion and many organisations either left these out, typed free-hand, or selected a contradictory response from the drop-down list. It is critical that instructions, practices, requirements, deadlines communicated to organisations through the ITAWARE automatic e-mail system correspond with those contained in the manual and other reference sources. CHIETA Regional staff needs a test system to practice on from the point of view as a user and an administrator in order that we have the level of understanding necessary for better guiding and supporting our organisations. A test system would also enable us to identify any pitfalls that organisations may experience as users.
- An online system should be designed around the user. The possibility of a user to make a mistake should be minimised without comprising the quality of the data required.
- Kindly check why when you click on 18.2 it comes out as 18.1 or 18.1 comes out as 18.2. Kindly get that one sorted please.
- The MG system has challenges but is workable with a lot of support from IT Aware fixing the problems. The DG system is fraught with challenges and I cannot see how it will be workable moving forward.

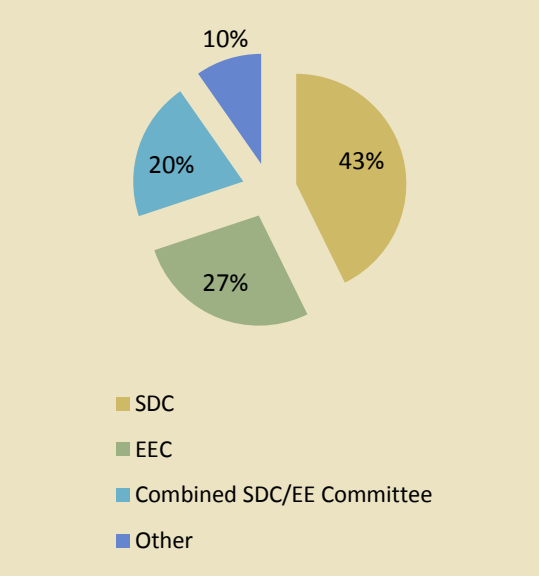
5 External Respondents' Views on Skills Development Committees

As noted in the introduction, in the External Phase 1 survey, respondents we also asked a number of questions in relation to Skills Development Committees. 111 of the 196 respondents (57%) who answered the question as to whether they have a Skills Development Committee indicated that they did have an SDC. Of those that answered No to this question, most indicated that this was because they had less than 50 employees in their workplaces, as shown in the diagram below:



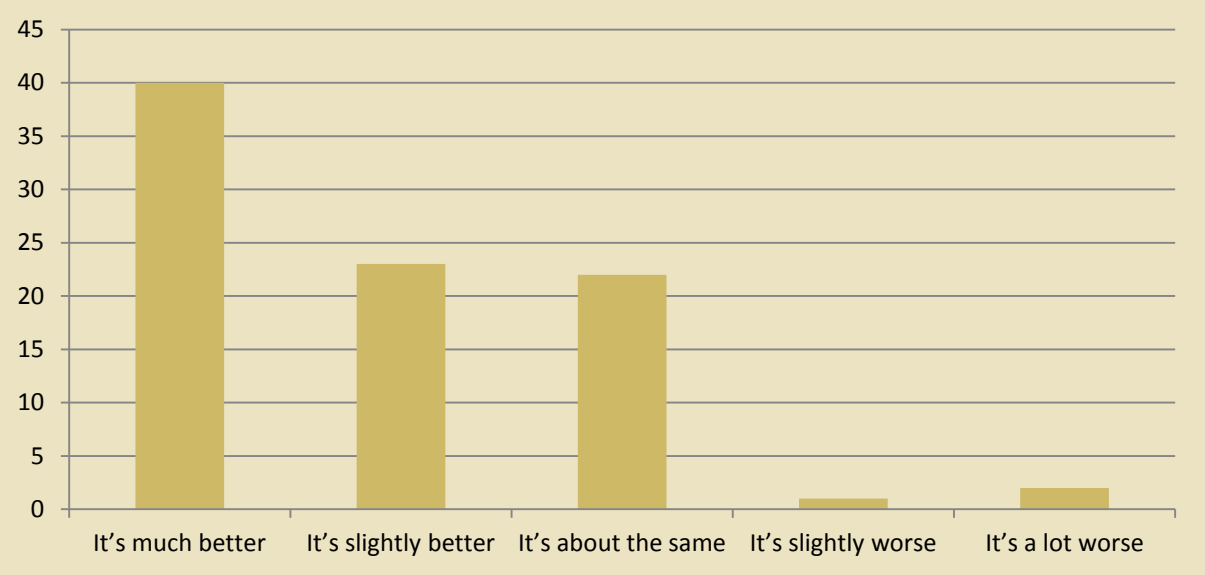
Two of the respondents who selected other indicated that they were in the process of setting up an SDC. 88 out of the 120 respondents who indicated that they had a Committee said that the Committee had signed off on the application – 73%.

Of those that did have a committee, 43% said that it was a dedicated Skills Development Committee, while 27% said that they used their Employment Equity Committee to discuss skills related matters and 20% said that it was a combined skills development and employment equity committee, as shown in the diagram to the right. Of those that selected 'other' one respondent indicated that their committee was a 'transformation committee', while three said that they used their safety committee meetings to discuss skills development.

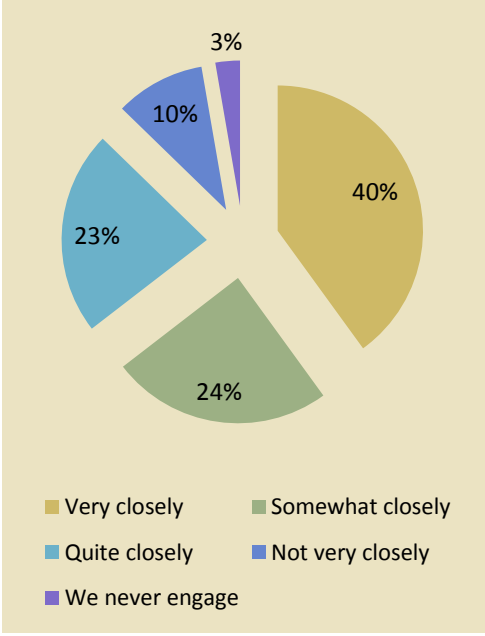


Skills Development Committees are fairly well established in the sector, with 60% of respondents indicating that their committees had been in existence for three years or more. 25% said they had been in existence for between one and two years and 15% said they had been in existence for less than a year. However, it is notable that SDCs do not meet very often: respondents were asked how often the Committee met during the last (2013) WSP/ATR submission process – 35% indicated that it had met twice, and 25% once, at the end of the process. 18% said the committee had met once and the beginning of the process. Only one respondent indicated that it had met six or more times during the process.

Respondents whose committee had been functioning for a year or more were asked whether they thought that skills planning had improved: 63 said it had got 'slightly' or 'much' better.



Three respondents who said it had got 'slightly' or 'a lot' worse' attributed this to experienced members having left the Committee.



When asked how closely the SDF and the committee worked, 64% of respondents indicated that the Committee and the SDF work 'very' or 'somewhat' closely. One respondent who said that they did not work together very closely indicated that this was because the Committee was still new, while another indicated that there were problems within the Union which precluded closer working relationships. Two indicated that 'management' still determines training requirements.

As shown in the diagram to the left, when asked about the nature of the discussions at the committee, 45% of respondents said discussions at the committee were 'extremely' or 'very' constructive, while another 40% said that they were 'somewhat' constructive. Three people who said discussions were not constructive indicated that this was due to a lack of

understanding of the role of the Committee (only 31 respondents indicated that the Committee had received training), while another three indicated that there were tensions between what the unions wanted and what the organisation needed: "*Unions don't want training that is PIVOTAL as they don't see value for themselves or people*."

6 Concluding Comments and Recommendations

6.1 Regarding the Mandatory & Discretionary Grant Online Application System

Although in general both internal and external users are happy with the system, there are some clearly some issues causing dissatisfaction. These have been noted throughout this report where relevant, but to summarise, in relation to 'technical' problems (i.e. problems that relate to the design of the system itself):

- Lack of articulation between companies' internal systems and the CHIETA system was raised by a few external respondents and one internal respondent. It is particularly problematic for large companies which have to input large amounts of employee data.
- Compatibility with different versions of Excel
- Fixed column widths and no ability to hide columns
- Document not responding to commands
- Lengthy error reports and the time it took to generate them,
- A few respondents mentioned difficulties with finding the upload button (DGs) and getting the data uploaded. Also the website timing out while trying to upload
- Also in relation to DGs, adding and managing learning projects and completing and uploading the learner schedule were raised as problems. In relation to adding learning programmes, some problems were noted with generating the PIVOTAL report. One suggestion was that ongoing projects should have a separate section where current information can be stored. Another suggestion was for the inclusion of a text box to allow people to put comments in for later reference.
- One respondent indicated that there was a lot of inconsistency between the actual application and the report generated, and the issue of multiple MoAs was also raised as a concern. With regard to completing and uploading the learner schedule, the main concern raised was relating to the number of records and level of detail that was required.

It is recommended that the system developers look into these specific problems and attempt to address them where possible.

In addition to these technical issues, there are some general 'knowledge' gaps which the CHIETA could look at filling, particularly around scarce skills and the OFO codes: how to 'match' these more accurately to internal job titles. One respondent indicated that they thought the descriptions of training courses (in the DG application) were difficult to understand. External users in general found the CHIETA guidelines and workshops useful, and it is recommended that these be extended. Another point that was made was that people found the applications easier over time, so it might be worthwhile to consider some 'mock' uploading exercises during the proposed training. One of the internal users commented that they thought that many SDFs were unfamiliar with using excel, and so CHIETA might consider some basic excel training for those SDFs who require it.

Internal users are also very much in need of training and practicing on the system, and this needs to be prioritised, particularly in relation to the DG system, so that they are able to provide the necessary support to external users.

6.2 Regarding the Skills Development Committees

It is difficult to make recommendations in relation to the SDCs as the responses here reflect only the views of management respondents. It is noted that the CHIETA is planning on conducting research amongst trade unions as to their experiences of and views on SDCs, and more consolidated recommendations should be made at the conclusion of this exercise.