DEVELOPING A MODEL FOR ESTABLISHING,
IMPLEMENTING AND MAINTAINING
LEARNERSHIPS IN SOUTH AFRICA

BY

BRIAN HAMLET

This dissertation is presented in complete
fulfillment of the requirements for the degree:
MAGISTER TECHNOLOGIAE: HUMAN RESOURCES MANAGEMENT
in the Faculty of Business and Economic Sciences
at the Nelson Mandela Metropolitan University

PROMOTER: PROF. D. M. BERRY

January 2005
‘If I have been able to see further, it was only because I stood on the shoulders of giants’.

- Sir Isaac Newton (1643 to 1727), English mathematician and natural philosopher (physicist).
DECLARATION

“I, Brian Hamlet, hereby declare that:

- the work contained in this dissertation is my own original work,

- all sources used or referred to have been documented and recognised, and

- this dissertation has not been previously submitted in full or partial fulfillment of the requirements for an equivalent or higher qualification at any other recognised education institution.”

February 2005

Brian Hamlet      Date
ABSTRACT

The research problem in this study was to identify how successful the methods are that organisations use within the Manufacturing Engineering and Related Services Education and Training Authorities (MERSETA) chambers to develop, implement and maintain learnerships.

To achieve this aim a literature examination to determine the aspects of workplace learning were explored, including the various perspectives of learning, together with an investigation into workplace learning. Further, apprenticeships, traineeships, learnerships were discussed; including the concepts vocational education and training standards, and competence explored.

Finally a process model for effective learnership implementation was presented based on international approaches together with the South African models and current practices.
The process learnership model served as a basis for drawing up a survey questionnaire to establish the extent to which organisations agreed or disagreed with the learnership model developed. The survey was limited to the “automobile” and “new tyre” chambers of the MERSETA.

The results obtained from the empirical study indicted a high degree of agreement with the process model for effective learnership implementation. The results obtained from the quantitative data, and qualitative data were used to adapt the learnership process model, and produce a six-phase integrated learnership model.

From the survey it become evident that organisations needed to be sensitised and educated as to learnerships before considering more seriously learnership implementation. Further, it emerged that learnerships cannot only be effective within a process approach, and that it should also take place within a positive “organisational learning culture”.

Organisations and Sector Education and Training Authorities (SETAs) can now use the six-phase integrated learnership model with confidence, as there was a high degree of agreement with the learnership model that was developed as part of this research study. The six-phase integrated learnership model has been comprehensively developed and surveyed by organisations that are currently implementing learnerships on a large scale.

Organisations and SETAs can now give effect to the Skills Development Act No. 97 of 1998, and contribute to the National skills Development Strategy of 2001, which aims to improve the workplace skills of all South Africans.
ACKNOWLEDGEMENTS

The successful completion of this research would not have been possible without the support, guidance and encouragement of certain individuals. In particular, the following are acknowledged:

- my Father God for providing me with the ability and strength to complete the dissertation,

- Prof. Dave Berry, my promoter, for his professional and constructive guidance during the course of my research effort,

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- Ms. Sandy Blunt and Miss. Heather Cousins for editing the dissertation,

- my family, Shelley, James and David, for their support,

- the authors in the reference list who provided the base information possible for this dissertation, and

- the respondents to the study who supplied the empirical data.
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CHAPTER 1

INTRODUCTION, PROBLEM STATEMENT, AND OUTLINE OF THE RESEARCH PROJECT

1.1 INTRODUCTION

According to Nel, Gerber, van Dyk, Haasbroek, Schultz, Sono and Werner (2001, p. 124), training is critically important in South Africa and has undergone a major overhaul in the recent past.

The South African Qualifications Authority Act No. 58 of 1995 instituted the South African Qualifications Authority (SAQA) and its functions in May 1996. This provided the impetus for the Skills Development Act No. 97 of 1998 to replace the Manpower Training Act No. 56 of 1981 (Nel et al., 2001, p. 124). The banking industry Sector Education and Training Authority (BANKSETA, 2000, p. 2) states that the broad purposes of the Skills Development Act (SDA) are to:

- develop the skills of the South African workforce,
- increase the levels of investment in education and training by both employers and employees,
- improve employment prospects of persons previously disadvantaged,
- ensure the quality of education and training in and for the workplace, and
- assist work seekers to find work and provide and regulate employment services.
Furthermore, Chapter 3 of the Skills Development Act No. 97 of 1998 led to the establishment of Sector Education and Training Authorities (SETA’s) with the following functions:

- to develop and implement a sector skills plan by implementing learnerships, and
- to promote learnerships by:
  - identifying workplaces for practical work experience,
  - supporting the development of learning materials,
  - improving the facilitation of learning,
  - assisting in the conclusion of learnership agreements, and
  - registering learnership agreements.

There are twenty five (25) SETA’s to cover all the economic sectors. A SETA is the most important structure with which employers interact (Mercorio and Mercorio, 2001, p. 3).

A SETA is the authority which combines the functions of industry training boards, education and training quality assurance and those additional functions required to implement the skills Development Strategy. A SETA may, with approval of the minister, establish chambers in its sector. Each chamber must have equal representation of employer and employee representatives to perform the functions delegated to it in terms of the constitution of the SETA (du Plessis, Fouché and van Wyk, 1998, p. 141 - 142).

An article by the Financial and Accounting Services Sector Education and Training Authority (FASSET - Learnerships-Background, July 2001a, p. 1) maintains that some of the labour market issues that learnerships are directed at, include:

- the decline in levels of employment in South Africa,
• the unequal distribution of income,
• unequal access to education and training, and employment opportunities,
• the effects of race, gender and geographical location on advancement, and
• the skills shortage amongst the labour force.

Learnerships are intended to address the gap between current education and training provision and the needs of the labour market (Van Dyk, Nel, van Z Loedolff and Haasbroek, 2001, p. 18).

It is important to note that a learnership is not a qualification (Bellis, 2000, p. 218); however, it could lead to a recognised qualification on the National Qualifications Framework (NQF).

The Banking Sector Education and Training Authority Council took the view that learnerships would only be established on the basis of pilot exercises conducted during 2001 and 2002 (BANKSETA, 2000, p. 5). In addition, the Council required that the learnership pilot projects be closely managed and evaluated. Strong (2000a, p. 19) agrees, maintaining that learnerships will become one of the most transformative tools in education and training. Therefore it is critical that employers and providers become familiar with their design and establishment as soon as possible.

Although there are many challenges to SETA’s and organisations when implementing learnerships so as to add value, there are not many guidelines currently available to aid this process.
This gap in implementation formed the basis for the main problem of this study:

**How successful are the methods used by organisations within the Manufacturing Engineering and Related Services Education and Training Authorities (MERSETA) chambers to develop, implement and maintain learnerships?**

An analysis of the main problem within the context of background reading allowed for identification of the following sub problems:

**SUB-PROBLEM ONE**

What methods are required for organisations to develop, implement and maintain learnerships that are revealed in literature?

**SUB-PROBLEM TWO**

What methods are organisations within the Manufacturing Engineering and Related Services Education and Training Authority (MERSETA) chambers utilising to develop, implement and maintain learnerships?

**SUB-PROBLEM THREE**

To what extent do the methods used by organisations within the Manufacturing Engineering and Related Services Education and Training Authority (MERSETA) chambers differ from those suggested in the literature?
1.2 DELIMITATION OF THE RESEARCH

The parameters within which this study was conducted are defined with the purpose of creating a manageable research structure.

1.2.1 Method

The proposed study was limited to an investigation of the methods used by organisations that interact with the MERSETA in developing learnerships. The most appropriate definition of the word ‘method’ within the context of this research is a ‘special form of procedure, …, orderly arrangement of ideas’ (The S.A. Pocket Oxford Dictionary, 1993, p. 474).

1.2.2 Sector profile

For the purposes of planning and managing the delivery of training, the economy has been divided into 25 sectors, each of which has its own SETA (SETA’s, 2001, p. 2). This research was limited to two (2) MERSETA chambers and related organisations.

1.2.3 Geographical delimitation

The MERSETA has 5 chambers that cover its economic sector. The five chambers are (MERSETA, 2003, p. 31):

- automobile,
- new tyre,
- plastics.
- motor, and
- metal and engineering.
The organisations that make up the various chambers are spread nationally across South Africa. This research study was aimed at organisations within the MERSETA with emphasis on the Automobile chamber, and New Tyre chamber.

1.2.4 Subject of evaluation

The study evaluated the methods used by organisations within the MERSETA chambers to establish, implement and maintain learnerships according to theoretical criteria. Evaluation was limited to the development, implementation and maintenance of learnerships only.

These limitations were chosen as parameters for the research, as the methods used by the MERSETA chamber organisations brought meaningful representation to this study in relation to the Manufacturing and Engineering economic sector.

1.3 DEFINITION OF CONCEPTS

The terms used in the title and problem statement of this research project are elaborated on for clarity.

1.3.1 Develop

*The South African (S.A.) Pocket Oxford Dictionary* (1993, p. 204) defines develop as ‘to make, or become bigger or fuller, or more elaborate or systematic’.
1.3.2 Development

Expanding on the term develop, the S.A. Pocket Oxford Dictionary (1993, p. 204) indicates development as ‘developing or being developed; a stage of growth or advancement’. This means that what is being developed is never in a final state, but constantly evolving.

1.3.3 Model

According to Bellis (2000, p. 180), the term model expresses interconnected relationships between the main components or elements of a system. A model need not necessarily be represented diagrammatically or graphically; although it could be useful and is frequently done.

1.3.4 Establishment

The South African Pocket Oxford Dictionary (1993, p. 254) defines the word establish as, ‘[to] set up a system of business etc.’ This is an apt description, as the purpose of this research study is to confirm the methods applied by MERSETA chamber organisations.

1.3.5 Implement/implementation

According to the S.A. Pocket Oxford Dictionary (1993, p. 373), the term implement refers to a contract or decision that is ‘put into effect’.

1.3.6 Maintain/maintenance

The S.A. Pocket Oxford Dictionary (1993, p. 454) explains the word ‘maintain’ as follows; ‘cause to continue, …, take action to preserve’.
Maintenance ‘is keeping the equipment etc. in [good] repair’. As with most interests it is important for all systems to remain current.

1.3.7 Learnerships

In order to offer a logical explanation of the above phrase, each word was explained separately before the phrase was defined in its entirety.

1.3.7.1 Learner

The concept learner can be explained as ‘one who is learning a subject or a skill’ (The S.A. Pocket Oxford Dictionary, 1993, p. 426).

1.3.7.2 Ship

The suffix-forming noun denotes ‘quality or a condition; as well as a skill in a certain capacity, e.g. horsemanship’ (The S.A. Pocket Oxford Dictionary, 1993, p. 708).

The learner learns the skill, not the learnership. The learner will learn the skill through the learnership, to a certain level or stage. The Financial and Accounting Services Sector Education and Training Authority describes a learnership as a work-based route for learning and gaining qualifications (FASSET – What is a learnership?, July 2001c, p. 1).

1.3.8 Method

Bellis (2000, p. 181) clarifies ‘a method’ as the specific, actual delivery of something, or doing something; ‘the ways, techniques, steps and tasks in actually carrying out a process’.
1.3.9 Successful


1.3.10 MERSETA

The Manufacturing Engineering and Related Services Education and Training Authority is concerned with education and training. Their task is to aid the implementation the National Skills Development Strategy and to increase the skills of people in their economic sector (SETA’s, 2001, p. 2).

1.4 ASSUMPTIONS

A search of South African databases revealed no previous research on learnerships. This is primarily due to the short span of time since their inception in South Africa, namely 1998. An international search revealed information on approaches similar to the South African concept of learnerships. The researcher assumed that there is adequate international information and data available for the purposes of this study. A further assumption was that much of the information for this research study would have to be gained from attending skills development conferences and workshops, examining journals and articles; and conducting qualitative interviews.

1.5 SIGNIFICANCE OF THE RESEARCH

Mercorio and Mercorio (2001, p. 32) explain that unit standards form the basis of the learnership system. The unit standards are the building blocks of qualifications registered on the NQF. The unit standards are
statements of desired education and training outcomes and associated assessment criteria, which when clustered together to form qualifications.

As an Education and Training Quality Assurance (ETQA) body, each SETA must make sure that the training programmes, learnerships and qualification training for which it is responsible are of the same high standard no matter where they are presented in the country (SETA’s, 2001, p. 7).

This research study was born out of the need to ensure uniform quality of learnership training provision. It is necessary to ensure that a standard method of learnership development is maintained across all chamber organisations and sectors, and that the quality of learnership implementation is held at a high level.

The feasibility of this study was guaranteed as SETA’s must ensure the establishment of learnerships as part of their legislated functions (SETA’s, 2001, p. 9). Learnership guidelines for employers, providers, learners, and for assessment were starting to emerge and provided impetus for the SETA’s to achieve their functions and objectives (MERSETA, 2002b, p. 2).

Furthermore Mercorio and Mercorio (2001, p. 25) emphasise the experiences of the United Kingdom, Australia and New Zealand, all of who adopted systems similar to the South African NQF. These countries indicated increased benefits for companies and workers in the new global economy. Some of the benefits of the Australian apprenticeship system within the Australian Qualifications Framework (AQF) are the excellent job prospects versus university graduates, long term career prospects and lifetime earnings potential (NCVER, 2001a, p. 6). Positive
reports also have emerged with regard to the facilitation of unit standard and qualification development, and learnership implementation as part of various learnership projects commissioned by SETA’s with assistance from foreign donors (Lilley, 2001, p. 2).

The results from this research can be used for establishing future learnerships and will also allow practitioners in education, training and development to understand what will be required when establishing learnerships. Managers, business people and leaders of organisations will benefit from this study as there are serious financial implications, as well as equally serious opportunities within the legislation (Bellis, 2000, p. 1). The effective establishment of learnerships will give effect to various pieces of legislation and will benefit the employers, workers and the economy (FASSET National Strategy, 2001b, p. 8).

A thorough search of various databases revealed that no previous research had been conducted on the establishing learnerships in South Africa. This research will therefore provide a model for learnership establishment, as there were very few guidelines currently in place. ‘The learnership models are in people’s heads at this stage’ (J Kromberg, Learnership Manager, MERSETA, personal communication, 23 November 2001).

The above comments accentuated the need for an investigation into the methods used by organisations as part of a SETA in establishing learnerships in South Africa, as well as the contribution this study can make towards:

- identifying effective and ineffective practices in establishing learnerships, and
- proposing guidelines for improvements.
The results of this study may be used by:

- managers and Human Resources (HR) professionals, in particular Education Training and Development (E T and D) practitioners consultants, and
- the research community as a basis for future research if the findings of the empirical component are used to further investigate areas such as the influence of learnerships on organisational performance, or learnerships impact on the South African economy.

1.6 OBJECTIVES OF THE RESEARCH

The objective of this study was to offer a practical model for establishing, implementing, and managing learnerships, based on existing literature and practices. This added value by contributing to a lack of knowledge on this particular topic.

The specific objectives were:

- to establish guidelines for establishing, implementing and managing learnerships in terms of theoretical constructs,
- to determine how the MERSETA Automobile and New Tyre chamber organisations develop and implement learnerships,
- to develop a theoretical framework that can serve as a model for establishing and implementing learnerships, and
- to interpret the extent to which the MERSETA chamber organisations approach to learnerships, differs from the theoretical guidelines.
1.7 RESEARCH METHODOLOGY

The following procedure was used to address the stated sub-problems:

- a literature study of published, unpublished and electronic texts relevant to the topic was undertaken to ensure the integrity of the study and strengthen its reliability (Leedy, 1993, p. 224),
- various approaches were identified through the synthesis of existing information,
- a theoretical framework was developed to identify and interpret how MERSETA chambers develop, implement, and maintain learnerships,
- the empirical data required to achieve the research objectives were obtained by means of an analytical survey (questionnaire). This survey method (Leedy, 1993, p. 244) was deemed to be the most appropriate as it translated findings, in order to determine their nature and interrelationship more clearly,
- this survey had the following features:
  - the survey was limited to the target population of two (2) MERSETA chambers,
  - the individual questions of the questionnaire were aimed at eliciting an insight into the approaches identified, and
  - the quantitative methodology gained insights into the particular variables of the study, and collected information on these variables (Leedy, 1993, p. 144).
  - qualitative information was also obtained relating to the actual organisational experience with regard to learnership, or impending learnership implementation,
  - the blending these two approaches (triangulation) enhanced the validity (qualitative) and reliability (quantitative), and gained a true and full picture for this study,
the analysis and interpretation of research statistics took place within the boundaries of methodological rigour ensuring the status of the findings in this project.

1.8 OUTLINE OF THE DISSERTATION

The research project is divided as follows:

- Chapter 1 contains the introduction, problem statement and outline of the research project,
- Chapter 2 examines aspects of workplace learning,
- Chapter 3 considers the features of learnerships,
- Chapter 4 presents the organisational learnership model,
- Chapter 5 describes the research methodology and the design of the field study,
- Chapter 6 analyses and interprets the results of the empirical study, and
- Chapter 7 summarises, reaches conclusions and makes recommendations.

1.9 CONCLUSION

The aim of this Chapter was to place the study into perspective by stating the main problem of the research along with the sub-problems. The remaining Chapters aim at addressing the main and sub-problems. Chapter two will discuss aspects of workplace learning.
CHAPTER 2

ASPECTS OF WORKPLACE LEARNING

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CHAPTER 2

ASPECTS OF WORKPLACE LEARNING

2.1 INTRODUCTION

Numerous authors agree that change is one of the most common features of organisations over the last decade, and its rate shows no sign of slowing down (Braham, 1995; Deming, 1982; Dotlich and Cairo, 1999; Nel, Gerber, van Dyk, Haasbroek, Schultz, Sono, and Werner, 2001; Rowden, 1996; Stone, 1998; Kruger and Adams, 2000). Mullins (1996, p. 130) believes that it is important for the health of both the individuals who make up the organisation, as well as the organisation itself to enable people to develop strategies for learning to cope with organisational change.

As workplace learning is increasingly being used in organisational learning to lever competitiveness. The reason is that it provides access to expertise and infrastructure that is often not available through normal provider learning (Billet, 2000, p. 9). The drive of Chapter two will be to explore the various perspectives of learning, together with an investigation into workplace learning.

2.2 PERSPECTIVES OF LEARNING

With the high rate of unemployment in South Africa, the government is focusing more attention on education training and development. To make a meaningful contribution and add value, it is necessary to understand that learning is an all human activity that takes place within ‘world view’ schools of thought, and manifest itself based on social learning (Berg, Theron, Albertyn, Bardenhorst, Geldenhuys, Ungerer, Cilliers, and de Koker, 1999, p. 78, 96).
The concepts of learning, together with social learning theory, and the learning processes of adult learning will be examined to grasp a more holistic view of learning.

2.2.1 The concept of learning

Berg et al. (1999, p. 96), and Mohan (1993, p. 147) state that the performance of learning can be observed, but not the learning process itself. Fontana (1992, p. 125) declares that learning is a highly complex process and thus there is a need to use psychological theories to explain learning.

Fontana (1992, p. 126) defines learning as follows:

… “the apparent modification of a person’s behaviour through his activities and experiences, so that his knowledge, skills and attitudes, including modes of adjustment, towards his environment are changed, more or less permanently”.

Psychological inferences of the learning process can be made when a person can do something later which he or she could not do before. These changes must be based on a behaviour change as a result of performance in the work environment Berg et al., 1999, p. 96)

Berg et al. (1999, p. 97) cite Hergenhahn and Olson (1993), and Robbins (1998) who define the concept of learning as relatively permanent change in behaviour (or potential behaviour) that results from experience. Potential behaviour can be explained by using an example of paramedics, who learn to save lives by watching lectures and listening to lectures, but do not translate the leaning behaviour until they are involved in a real emergency.
The paramedics have the potential to save lives resulting from the learning, although their behaviour is not immediately affected. Fontana (1992, p. 125) synthesises these definitions and states that most definitions of learning attest to three things: learning must change the individual’s behaviour in some way, the change comes about as a result of experience; or the individual’s potential behaviour from experience.

It thus appears that learning must result in a permanent change to the individual’s behaviour that can be measured in an on-the-job environment. This begs the question of how one can be sure that learning has been transferred into positive behaviour on-the-job?

Camp, Blanchard and Huszczo (1986, p. 133) point out that the only reliable way to search for the truth regarding organisational learning effectiveness, is to apply scientific methods in terms of processes and outcomes. Camp et al. (1986, p. 136) advocate an ‘outcome evaluation’ which is used to identify and measure the outcomes that learning has produced.

Many authors recommend Kirkpatrick’s ‘four level’ model for evaluating adult learning (Berry, 1995, p. 135; Broad and Newstrom, 1992, p. 46; Camp et al., 1986, p. 136; Rose, 1999, p. 7). Kirkpatrick (1994, p. 26) elaborates on the four level model, stating that it can be used to measure learning quality correctly, accurately, and skillfully. Level 1 and 2 evaluation is used to measure the results from learning, and level 3 and 4 provide information concerning the application of the learned knowledge and skills on-the-job, together with the impact on business operations.

Broad and Newstrom (1992, p. 9), Kirkpartrick (1994, p. 23) and Schutz (1997, p. 198) suggest various conditions that are pertinent and must be
present to aid the transfer of learning to individuals’ jobs, gained from both off-the-job and on-the-job learning.

The researcher concludes that learning is a product or end result of individual learning measured in an on-the-job situation, with many benefits for individuals and organisations given the right conditions.

2.2.2 Psychological schools of thought relating to learning

Berg et al. (1999, p. 97) note that learning can be described from different ‘world views’, based on the different psychological schools of thought. A school of thought is described as an intellectual movement where theorists share more or less the same ideology, although they may have different theoretical and methodological propositions (Berg et al., 1999, p. 5).

Fontana (1992, p. 126) claims that there is sharp divergence between psychologists on learning theories which places psychologists into opposing camps. Essentially the learning theories are divided between behaviourist and cognitive approaches.

Behaviourism is one of the schools of thought which is aimed at developing general principles of behaviour based on control and predication of overt behaviour (Berg et al., 1999, p. 7). Mullins (1996, p. 122) insists that the behaviourist researchers are interested in ‘behaviour-action’ events that can be observed, measured and controlled, rather than ideas and thoughts in people’s minds which are invisible and impossible to measure. Camp et al. (1986, p. 63) concur and add that behaviourists define learning in terms of changes in behaviour.
Cronje’ (2003, p. 2) confirms this notion of behaviourism as follows:

… behaviorists believe that the environment shapes behaviour. They are concerned with the changes in a student's behaviour that occur as a result of learning. Behaviourist theory emerges in the form of operant conditioning, using reinforcement. This practice is reflected in the classroom by the use of gold stars, time at the computer, etc.

Various authors critique the use of re-inforcement and punishment in the behaviourist approach (Camp et al, 1986, p. 69; Fontana, 1992, p. 130; Kruger and Adams, 2000, p. 59; Mullins, 1996, p. 125). Authors agree that it can change learners' behaviour; however it can also decrease an interest in learning. Further, it can lead to manipulation if it is the only and dominant style of facilitation. Over-use of a behaviourist approach seriously limits individual areas of learning which are particular to humans (speech, perception, motivation, complex thought).

A contrary school of thought, which was called humanism in America and phenomenology in Europe, emerged as a reaction against behaviourism. Adherents to this school of thought maintained that people cannot be seen as machines that simply react to external stimuli, as behaviourism claimed. Humanism assumes that humans have an innate inclination towards psychological growth and self fulfillment, and with their will can overcome environmental limitations (Berg et al., 1999, p. 12).

Berg et al. (1999, p. 13) point out that the humanistic psychology culminated in the cognitive movement. Cognitivists define learning in terms of cognitive processes that may or may not be reflected in behaviour (Camp et al., 1986, p. 63).
Cognitive theorists assume that humans are basically problem-solvers and that they can be understood by taking cognisance of the way in which they evaluate and process stimuli, make plans and react (Berg et al., 1999, p. 13).

Cronje (2003, p. 3) accounts for cognitive theorists as follows:

... cognitive theorists are concerned with the changes in students' understanding that result from learning. They believe that learning must be meaningful. Cognitive learning is based on schemata or mental structures by which students organise their perceived environment. Schematic structures of cognitive development change by the processes of assimilation, and accommodation.

Berg et al. (1999, p. 13) declare that the cognitive approach is applicable to the work situation as it places emphasis on Human Resources Development (HRD). In HRD it is assumed that it is natural for humans to work, as it is to rest and play. People have the ability to take responsibility, and if provided with the right opportunities, such as challenging work and participation in decision making, will be effective and satisfied workers.

Mohan (1993, p. 168) and Phillips (2000, p. 79) debate whether behaviourism and cognitivism offer ‘monolithic pictures’ of learning (one size fits all). The art of facilitating learning calls for a flexible and varied approach. Sometimes a lecture works best, sometimes participative discussion, sometimes role playing, sometimes group projects, sometimes none of these.

In conclusion there appears to be divergent psychological schools of thought towards learning. It seems that to be more effective one must align with a ‘humanistic world view’, although the behaviourist approach
to learning may be applied to obtain success in the short term. In reality, a mixture is used to facilitate learning; however a humanistic approach must be the more dominant for learners to become effective and to realise their full potential.

2.2.3 Social learning theory

Camp et al. (1986, p. 75) claim that the position between cognitivists and behaviourists has been narrowing, as both sides have made discoveries about the nature of human behaviour. An important contribution to the understanding of learning is ‘social learning theory’, developed by Albert Bandura and his associates. Social learning theory incorporates both cognitive and behaviourist ideas in describing the learning process (Kruger and Adams, 2000, p. 56).

Central to social learning theory (also called observational, or vicarious learning) is the idea that people learn through interacting with and observing one another. The primary process is modeling, which refers to offering behaviour that is intended to be imitated (Kruger and Adams, 2000, p. 57).

The theory represented in figure 2.1 proposes that stimuli from events and consequences in the external environment must be processed cognitively before they will have an impact on an individual's behaviour. The cognitive processes of attention, retention, motivation and behaviour reproduction are seen as necessary links between an environment stimulus situation and some subsequent response (Camp et al., 1986, p. 77).
Figure 2.1: Graphic representation of the social learning processes.

Source: Camp et al., 1986, p. 76.

Figure 2.1 shows the relationships between the components of the social learning theory model, and shows how behaviour is affected by its consequences. Behaviours that need to be reached in a training intervention can more easily be learned and reached by watching someone else engage in the behaviours to reach the learning goal. By simply observing and never having demonstrated the correct behaviours, anticipatory learning occurs in anticipation of re-inforcement (Camp et al., 1986, p. 76).

Bandura describes the individual’s cognitive processes as follows (Kruger and Adams, 2000, p. 57):

- attention: the learning process begins when the individual's attention is directed to stimuli in the environment thereby enhancing learning,
- retention: once individuals have noted the important aspects of the modeled behaviour, they must be transferred to memory. This involves representing the model’s actions mentally in some way (verbally, imaging, imitating) or by actual practice,
- motivation: new skills or behaviours acquired through observation may not be performed until there is some motivation or incentive to do so. Re-inforcement plays an important role in observational learning, and
- behaviour reproduction: once the behaviour has been internalised individuals may need further practice, feedback and coaching before successful modeling behaviour can be reproduced.

Camp et al. (1986, p. 78) explain that the behavioural reproduction is internal to the individual; however the final manifestation becomes part of the environment in which it occurs. Whether the environment delivers positive, negative, or no consequences in response to behaviour, that feedback will influence that behaviour in the future.

Three forms of re-inforcement are identified by Bandura to encourage observational learning (Kruger and Adams, 2000, p. 58):

- the observer may reproduce the behaviour of the model and receive direct re-inforcement,
- in-direct re-inforcement may take place when the observer sees the particular behaviour of others being re-inforced and increases the production of that particular behaviour, and
- as individuals see themselves making progress in imitating model behaviour, they experience self re-inforcement. This feeling of accomplishment is the most motivating re-inforcement of all.

Research has shown that the application of social learning theory to learning within organisations produces positive outcomes. The research
of Manz and Sims (1981) has shown that the various characteristics of the social learning theory model, the learner and the situation interact to influence the effect of observable acquired learning (Camp et al., 1986, p. 78). Social learning theory plays an important part for organisations as it is applied to formal training situations, workplace coaching and mentoring, and the induction and socialisation of new employees (Berg et al., 1999, p. 103; Camp et al., 1986, p. 78).

The researcher concludes that ‘social learning theory’ has reconciled behaviourist and cognitivist world views. Understanding social learning theory plays an important part in understanding and influencing the cognitive learning processes of humans. Understanding these cognitive processes is an important contribution to learning programmes that aim to formally influence the behaviour of people in the workplace and to influence and have an impact on organisational culture and informal practices.

2.2.4 The adult learner

Andragogics is defined as ‘the art and science of helping adults to learn (Van Dyk et al., 1998, p. 213). While pedagogics as the ‘science of teaching children’ (S.A. Oxford Dictionary, 1993, p. 556). Andragogics is thus a specialised field to enable adults to realise their life roles.

Didactics is a science that focuses on all facets of learning and related aspects. The science of didactics is applied to the disciplines of pedagogics and andragogics (Fraser, Loubser, and Van Rooy, 1996, p. 5).

Table 2.1 reflects a summary of the differences between the child and the adult in the learning situation related to the characteristics of adult learners (Van Dyk et al., 1998, p. 216).
<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Child</th>
<th>Adult</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Need to know</td>
<td>Needs determined by teacher</td>
<td>Needs to know why before learning</td>
</tr>
<tr>
<td>2. Learners experience</td>
<td>Little or no experience</td>
<td>Great volumes and quality of experience</td>
</tr>
<tr>
<td>3. Concept of the learner</td>
<td>Dependant on teacher</td>
<td>Self-directing</td>
</tr>
<tr>
<td>4. Readiness to learn</td>
<td>Ready when told to learn</td>
<td>Ready when need is experienced</td>
</tr>
<tr>
<td>5. Orientation to learning</td>
<td>Activities are subject centred</td>
<td>Activities are life or task centred</td>
</tr>
<tr>
<td>6. Motivation to learn</td>
<td>Largely extrinsic</td>
<td>Largely intrinsic</td>
</tr>
<tr>
<td>7. Authority relationship</td>
<td>Dependant on teacher</td>
<td>Self-dependant and self-responsible</td>
</tr>
<tr>
<td>8. Responsibility</td>
<td>Little or no responsibility</td>
<td>Co-responsibility</td>
</tr>
</tbody>
</table>

Table 2.1: Summary of learning characteristics.

Source: Van Dyk et al., 1998, p. 216.

By interpreting the table it is important to understand adult learner characteristics when developing learning programmes, as adults use different intellectual processing, versus children (Camp et al., 1986, p. 89).

Fraser et al. (1996, p. 32) note that children and adults are motivated by different stimuli, have different frames of reference, and give preference to different instructional strategies and learning styles. Andragogics also
differs from pedagogics with regard to the various characteristics of adult learning.

Rose (1998, p. 5) cites Knowles (1992) who provides insight into adult learning. Knowles declares that:

- adults are self-directed and therefore prefer to have some control over the learning situation,
- adults bring their own unique experiences to the learning situation, which can serve as valuable resources,
- adults’ readiness to learn is most often determined by their current needs, and
- adults want to apply tomorrow the skills they have learned today; thus emphasis should be placed on the practical application of the skills and knowledge obtained in the learning situation.

Knowles has further identified a number of conditions that are conducive to adult learning (Van Dyk et al. (1998, p. 215):

- the self concept of the learner: adult learners see themselves as producers and consider themselves to be independent and self-directing,
- experience: new learning is more easily understood if it can be linked to previous relevant experience. The past experience of a learner can therefore play a large role in facilitating learning,
- readiness to learn: adults have phases of development, growth and readiness to learn. Adults’ social roles (worker, parent) place them at various phases. The movement through these various phases changes, also changing the readiness to learn, and
- orientation to learning: adult learners have a perspective of immediate application to most of their learning.
Contracting learning requirements between the adult learner and the workplace supervisor or manager, provides many of the conditions that are conducive to adult learning. These conditions are involvement in planning learning experiences, participation in diagnosing learning needs, formulating objectives, selecting learning strategies, and evaluating learning. By this involvement, the adult learner develops a sense of ownership of the plan, which specifies all the requirements to help them know when they have acquired the desired proficiency (Camp et al., 1986, p. 90; Van Dyk et al., 1998, p. 222).

Thus an understanding of andragogics and of the characteristics of adult learners is critical to creating the correct conditions that will meet the expectations of adult learners. A learning contract should be seriously considered and implemented, as adult learners are highly self directed.

2.2.5 The processes of learning

Mullins (1996, p. 120) provides a simplified version of adult learning processes and declares that the processes are not only about knowledge and skills, but also attitudes and social behaviour. Individual differences occur because of the active and dynamic nature of the learning process. Individuals are active participants who interact and relate to the world around them. It is self-evident that learning will be influenced by how motivated an individual is and by the attitudes held. These attitudes can be affected by the rewards and punishment received in past situations, and by the culture and close environment within which the individual lives.
In figure 2.2 a simplified view of the factors that influence individual adult learning processes is represented. The figure is critical to the understanding that there are many factors that can assist and hinder an individual's internal processing, which will have consequences for occupational learning.

Braham (1995, p. 9) supports Mullins’s view and argues that learning is not the same as acquiring knowledge. Braham quotes Peter Senge’s view of learning:

“Real learning gets to the heart of what it means to be human. Through learning we re-create ourselves. Through learning we become able to do something we never were able to do. Through learning we re-perceive the world and our relationship to it.”
Through learning we extend our capacity to create, to be part of the generative process of life. There is within each of us a deep hunger for this type of learning”.

Van Dyk et al. (2001, p. 127) claim that to obtain this type of ‘real learning’ the processes by which teams work and learn in real time rely heavily on action learning and cybernetic loops. Cybernetics refers to the automatic control systems formed by the human brain and nervous system which when, applied to learning, record, collect, process and reproduce information in a similar manner to the mechanical communication control systems such as computers (Fraser et al., p. 20).

In cybernetics (Van Dyk et al., 2001, p. 127) knowledge is created by observing and reflecting on the experience which provides new concrete experience. This forms the basis of the action learning process where learning builds upon the experience and knowledge of an individual and/or a group, and upon the skilled new questioning that results in creative new knowledge. Van Dyk et al. (2001, p. 127) cite Revan’s equation of learning to illustrate this concept: ‘learning’ is ‘programmed knowledge’ plus ‘questioning insight’ (L = P + Q).

Mullins (1996, p. 127) declares that Kolb's learning cycle (see figure 2.3) emphasises the cyclical nature of learning. This approach emphasises the importance of the synthesis between the individual's behaviour and actions and the evaluation of their experiences. The individual's goals and aims are crucial. Reflection on what has been learned in order to experiment with new situations and to become aware of new possibilities is a vital part of the adult learning cycle. Hobbs (1992, p. 2) agrees, and reports that experience perceived in the present is the basis for reflective observation.
The figure indicates the cyclical nature of the process with new experience constituted at the end of each cycle. This process is useful and often used in organisations to assist individual experiential learning by using techniques such as: simulations, case studies, role-playing, business games, and in-basket techniques (Berg et al., 1999, p. 111).

Van Dyk et al. (2001, p. 127) agree with Mullins (1996, p. 128) on action learning. The authors explain that Kolb's learning cycle is the very essence of action learning. Learners are not able to be passive participants, but are forced into a situation which demands that they reflect and evaluate their actions. This encourages individuals to become lifelong learners and to make themselves central to the learning process by having to take responsibility for their own learning. In this regard Winch and Ingram (2002, p. 361) argue that the learning effectiveness of action learning depends upon the individual's personal level of maturity.
Van Dyk et al. (2001, p. 128) cite Argyris (1992, 1980) who makes the distinction between ‘single-loop learning’ and ‘double-loop learning’. Single-loop learning is any detection and correction of error that does not require changes in the values that govern the individual. Double-loop learning is the detection and correction of an error that requires change in the governing values and beliefs of a person. Hattingh (2004, p. 13) refers to double loop learning as a continuous cycle of learning, un-learning and re-learning.

Mullins (1996, p. 128) and Van Dyk et al. (2001, p. 131) stress that action learning should be used together with experiential learning to create learning cultures. Organisations have to cope with constant change and complexity, requiring a learning climate in which the new order of things can be understood. Mullins (1996, p. 128) elaborates that such a climate allows for disagreement and conflict by seeing differing perspectives as energising debate and innovation. Making mistakes is seen as an opportunity for review and modification rather than looking for someone to blame. Creating a learning organisation should have positive and liberating consequences, which include not only enabling organisational efficiency and effectiveness, but also significantly the generation of a ‘healthier and more cheerful organisation’.

The researcher concludes that to obtain ‘real learning’ it is necessary to rely on action learning, which uses both single and double cybernetic loops. Action learning should become part of the organisational culture as this will allow it to solve real life problems within a cognitivist world view. Organisations will thus learn faster and adapt to change rapidly, which will aid their survival.
2.3 AN INVESTIGATION INTO WORKPLACE LEARNING

Over the past 50 years there has been a growing emphasis on the importance of work-related learning and development and more recently this has been extended to workplace learning and organisational learning (Matthews, 1999, p. 18).

Workplace learning is part of a much broader and interconnected system. If one part of the system is changed the entire system is affected. This matter will be investigated to establish the new direction workplace learning is following.

2.3.1 Workplace learning paradigms

Thompson and Warhurst (1998, p. 1) note that there is a great deal of agreement among popular business and academic commentators about the modern trends of work and workplaces. We are living in a post-industrial economy, with future prosperity being hinged on the use of scientific and technical knowledge, the management of information and the provision of services.

Workplace learning has been heralded as a compass for navigating an environment constantly pressured by unprecedented change, competition, technological advancement, globalisation, workforce diversity, re-engineering and downsizing. The scientific community is involved in a world view shift from the machine age to the system age. The new sciences have departed from mechanistic thinking to a more organic understanding of systems, and relationships (Rowden, 1996, p. 21).

Cheung and Tang (1997, p. 11) maintain that there is always conflict between parties who support a worker-centred learning strategy [organic]
and those who opt for a management-centred strategy [mechanistic]. These philosophies stimulate the ongoing debate between humanism and behaviourism. Humanism in adult learning focuses on human beings and their values, capacities and achievements; while behaviourism is focused on training using objectives, emphasis on competence and content, and the central role of the facilitator.

Rowden (1996, p. 21) elaborates on the mechanistic perspective, which has been dominant for over three hundred years. This perspective views the world as a predictable, reducible and controllable machine which been deeply influenced by the industrial revolution. The mechanistic perspective designs work from a reductionist perspective, where functionalisation and simplification of tasks are the primary objectives.

Dew (1997, p. 1) argues that humanism and behaviourism are important as they provide mental reference points to identify those who think from an organic, evolutionary perspective; and who view change as part of an evolutionary process. On the other hand, those who think from a mechanistic point of view and imagine organisations as machines. Mechanistic views search for the right mechanical factors and conditions to achieve success. In other words, there are those who see their organisations as gardens and those who see then as machines.

Organisations can grow and blossom, or wilt and decay, just as flowers in a garden. Organisations obey the laws of the organic system much more closely than the laws of mechanical physics. What organisations and gardens both need are people who are willing to provide vision and planning and to get their hands dirty planting, tending, weeding and harvesting the benefits of their efforts. To generate an empowered workplace, organisations must be seen as organic and must be cultivated and nurtured (Dew, 1997, p. 2).
Rowden (1996, p. 21) notes that in spite of the availability of contemporary models, organisations still continue to apply old models and ways of thinking to new problems.

2.3.2 Leading organisational learning

Implementing workplace learning as a programme without taking into account features of the organisation’s system is not likely to reap the desired results. Jamieson (1981) as quoted in Camp et al. (1986, p. 3) states that practitioners in Human Resources Development (HRD) have failed to recognise the complexity of organisational systems.

Cummings and Worley (2001, p. 12) reiterate this view and confirm that organisations and their technological, political and social environments have become more complex and more uncertain. This trend has produced the need for a strategic perspective on organisational development and planned change processes at the organisational level. Change has a pervasive nature: it is very influential and is difficult to study in isolation. Organisations focus much attention on managing planned organisational change as a strategy deliberately initiated by management (Mullins, 1996, p. 729).

Kotter (2003, p. 8) explains that managing planned change in an organisation relates to the planning and budgeting, organising and staffing, controlling and problem solving. Management's purpose is to make an organisation run efficiently. Visionary leadership entails creating a vision and strategy, communicating the vision and strategy, getting buy-in and motivating action. Visionary leadership’s purpose is to help an organisation grow, evolve and adapt to changing circumstances (Kotter, 2003, p. 10). Kotter (2003, p. 32) postulates that both management and leadership are needed to run a business of any size in an era of change;
however the winning formula is 75-80% leadership and 20-25% management, and not the other way around.

Pandy (2003, p. 12) cites Goleman (1998) who motivates that 85-90% of leadership success is attributed to a leadership style which impacts on people's performance by creating a climate that will influence an additional discretionary effort of 30-50% with regard to individual performance.


At the heart of the change approach however are the learning principle processes that enable individuals to unlearn old behaviours and learn new ones (Ivancevich and Matteson, 1999, p. 610).

Kotter (1998, p. 6) proposes an 8-step process for organisations to excel in a rapidly changing world. However he stresses that the central challenge is changing people's behaviour. Kotter (2003, pp. 44-46) emphasises that individual managers and employees' resistance to change as a major constraint that is evident in all stages of a change effort.

Kotter (2002, p. 1) notes that changing behaviour is less a matter of influencing peoples thoughts than helping them to see a truth to influence their 'feelings'. Both thinking and feeling are essential and both are found in successful organisations, but the heart of change is in emotions (see figure 2.4).
Figure 2.4 The heart of change.


Figure 2.4 illustrates that ‘see-feel-change’ is more powerful than ‘analysis-think-change’. The distinction between seeing and analysis, between feeling and thinking are critical, because for the most part we use the latter much more frequently, competently and comfortably than the former (Kotter, 2002, p. 2).

Successfully handling change will lead to some typically negative reactions by employees (Nel et al., 2001, pp. 403-404); namely:

- disengagement,
- disidentification,
- disenchantment, and
- disorientation.

Sustaining success in the new economy means handling workplace change well. This will require good management and visionary
leadership; this is a form of leadership that can unleash huge amounts of intellectual, physical and emotional energy (Kotter, 2003, p. 58).

The researcher concludes that workplace learning as part of change must be handled from a planned, strategic and systemic perspective. Change should be 80% leadership and 20% management and it should be implemented in the organisation using interventions to change people at an emotional level. This new approach to planned change is necessary if the change in learning is to be efficient, effective and long lasting. This approach would also set a platform for employees to respond positively to future changes that will be required of them.

2.3.3 Workplace learning

Workplace learning is considered imperative to business success within the Strategic Human Resource Management (SHRM) paradigm. Workplace learning and HRD represent key strategic levers that can help organisations achieve Human Resource Management (HRM) goals such as quality, flexibility and commitment. For workers to be competent they must not only receive comprehensive and systematic initial training but must participate in a range of formal and informal learning activities throughout their entire working lives (Garavan, Morley and McQuire, 2002, p. 61).

Billett (1995, p. 20) adds that there is significant reliance for acquiring vocational knowledge and skills in workplaces. The findings from studies show that workplace knowledge is realised through learning experiences that are authentic, guided by experts and other workers and entail active engagement in tasks (Billett, 1995, p. 22; Billett, 2000, p. 272).

Garavan, Morley and McQuire (2002, p. 63) and Strickland, Simons, Harris, Robertson, Harford and Edwards (2001, p. 60) point out that
workplace learning requires a variety of learning approaches including those that are deliberate, concrete, didactic, informal, experiential, task and non-task orientated, real time and continuous asynchronous in nature.

Jacobs and Jones (1995, p. 22) note that structured, on-the-job learning has generated much interest and is a deliberate attempt to formalise workplace learning. Organisations refer to this form of workplace learning in a number of different ways: task training, workplace training programmes, training on-the-job, on-the-job coaching and planned on-the-job learning. Jacobs and Jones (1995, p. 22) define structured, on-the-job learning as follows:

The planned process of developing task-level expertise by having an experienced employee train a novice employee at or near the actual work setting.

Jacobs and Jones (1995, p. 25) view structured, on-the-job learning as a system, which means that it is a 'means to an end' and not an end in itself. Structured, on-the-job learning is one way of improving organisational performance because it develops employees' expertise. When employees have expertise, they can increase their productivity, complete projects on time, lower defect rates, or achieve other outcomes of importance.

Billett (1994, p. 11) suggests that workplace learning is defined as the acquisition of knowledge and skill as individuals attempt authentic vocational tasks supported by more skilled peers or experts.
Matthews (1999, p. 19) proposes a working definition of workplace learning:

> Workplace learning involves the process of reasoned learning towards desirable outcomes for the individual and the organisation. These outcomes should foster the sustained development of both the individual and the organisation, within the present and future context of organisational goals and individual career development.

The researcher notes that the principle arguments of these definitions are that any workplace learning should be within an authentic context and guided by a more experienced expert. This learning should produce desirable outcomes for the individual and the organisation, which will assist their present and future development.

Jacobs and Jones (1995, p. 31) propose a 6-step structured, on-the-job learning process, which is needed for orderly process design, delivery, and evaluation. It is often adapted in practice, with the steps being used iteratively as learning occurs. The structured, on-the-job learning process should be considered a subset of the larger performance improvement process.

The structured on-the-job learning process should only be developed after a thorough analysis of the gap between present job performance and desired job performance. Structured, on-the-job learning is appropriate only when the existing or anticipated performance problem is caused by a lack of knowledge, skill or attitudes (Jacobs and Jones, 1995, p. 32).
Jacobs and Jones (1995, p. 32) outline their 6-step structured, on-the-job learning process:

Step 1: Decide whether to use structured on-the-job learning,
Step 2: Analyse the tasks to be learned,
Step 3: Select, train, and manage the trainers,
Step 4: Prepare training modules,
Step 5: Deliver the structured on-the-job learning, and
Step 6: Evaluate and troubleshoot the structured on-the-job learning.

Rothwell and Kazanas (1994, p. 33) developed their DAPPER model which can be used by individual trainers in the absence of an on-the-job learning programme. The 6-steps of the DAPPER model are:

Discover needs for on-the-job learning,
Analyse work, worker, and workplace for on-the-job learning,
Prepare on-the-job learning,
Present on-the-job learning,
Evaluate the results of on-the-job learning, and
Review aids and alternatives to on-the-job learning.

Rothwell and Kazanas (1994, p. 34) concur with Jacobs and Jones (1995, p. 33) that a performance analysis must be determined to discover the on-the-job learning needs, and recommend Mager and Pipe (1970). Van Dyk et al. (1998, p. 255) state that the Mager and Pipe human performance model is in the form of a flow chart with a question checklist which guides the analyst through the flow chart in determining the problems and possible solutions to the problems.

Fowler (1998, p. 243) argues that vocational learning requires general studies. Trainees need to learn not only job-specific technical skills, but
also need to be aware of the process of learning so as to develop the capacity to go on learning, regardless of the context of that learning. A central consideration within the process of learning is related to the learning of not only ‘task skills’, but also ‘people skills’.

Fowler (1998, p. 242) calls for a return to the apprenticeship principle of learning, but with a difference; it should allow trainees to have the capability to renew their skills over an increasingly short period of time.

Billett (1994, p. 11) elaborates on the goal of apprenticeship, as a situated learning methodology to assist learners to acquire and integrate the knowledge and attributes for skilled vocational practice. As a learning methodology, apprenticeship stresses an interplay between observation, scaffolding and increased independence of learners. This process aids learners in developing self monitoring and self correction skills, and integrating the skills and conceptual knowledge required for expertise.

The apprenticeship method of instruction involves phases of modelling, coaching, scaffolding and fading as shown in figure 2.5 (Billett, 1994, p. 11).

![Figure 2.5: Apprenticeship instructional methodology.](image)

Source: Billett, 1994, p. 11.
Modelling involves an expert executing a task so that learners can observe and build a conceptional model of the processes required to accomplish tasks successfully (Billett, 1994, p. 12).

Coaching consists of a process of observation and monitoring as learners carry out activities. Experts provide hints, feedback, clues and tricks of the trade to assist learners to achieve desired outcomes (Billett, 1994, p. 12).

Scaffolding refers to the support that experts provide learners, albeit from a distance. The support can take the form of providing learners with opportunities to acquire knowledge and skills that are within the scope of their abilities. Scaffolding requires co-operative problem solving efforts between the expert and the learner in which the express intention is for the learner to take as much of the task responsibility as possible (Billett, 1994, p. 12).

Fading refers to the gradual removal of support until learners are able to conduct the task autonomously. This more distant support might lead to decisions about opportunities to engage in a range of more complex tasks (Billett, 1994, p. 12).

Cognitive apprenticeship (Billett, 1995, p. 23) bears a resemblance to the modelling, coaching and scaffolding approach to learning. Johnson (1992, p. 5) states that cognitive apprenticeship uses the same modelling, coaching, scaffolding and fading approach, but focuses on intellectual processes. Cognitive apprenticeship uses many of the instructional strategies of traditional apprenticeship, but emphasises cognitive skills rather than physical skills.

Johnson (1991, p. 13) emphasises the importance of cognitive apprenticeship and cognitive process skills. Cognitive processing skills
include the higher order thinking skills of problem solving, decision making and creativity; skills which lead to flexible behaviour and the ability to learn.

However, Brown, Collins and DuGuid (p. 10) debate the inseparability of knowing and doing. Many professions with an acknowledged cognitive content, such as law, medicine, and architecture have been traditionally learned through cognitive apprenticeship. Cognitive apprenticeship attempts to promote learning within the activity of authentic work and culture.

Billett (1994, p. 12) and Vorwerk (2002, p. 1) concur and state that apprenticeship learning methodology has a wider application than developing skill for trade work with which it is historically associated.

Berryman (1993, p. 4) cites Collins, Brown and Newman (1989) who propose a cognitive apprenticeship model that ignores distinctions between academic and vocational education. The four building blocks are content, methods, sequence and sociology. Berryman (1993, p. 5) maintains that the principles of cognitive apprenticeship systematically preserve and integrate the best of academic and vocational education into a single model.

The researcher concludes that workplace learning should be guided by an expert in an authentic work setting. The expert could be guided by various on-the-job learning steps, but must utilise apprenticeship instructional methodology. In applying the apprenticeship instructional methodology the expert should not neglect the higher order intellectual skills associated with cognitive apprenticeship to develop higher order cognitive processing skills. Developing the cognitive area will allow employees to specialise in current activities, but be flexible enough to adapt to future change by continuing to renew their capabilities.
2.3.4 Organisational renewal

Cheung and Tang (1997, p. 25) stress that worker training is no longer limited to the adoption of specific skills or knowledge as required by the job. Attention is now paid to the workers developmental needs as well as to the cognitive and affective components of learning. Interestingly Cheung and Tang (1997, p. 22) note that extensive research during the 1960s and 1970s showed that those workers who engaged in decision making in their work environments were least likely to suffer occupational injury or illness.

Rowden (1996, p. 3) maintain that a literate, educated, inquisitive, problem solving workforce is essential to the survival and competitiveness of business and industry. Gibbons-Wood and Lange (2000, p. 28) and Kay, Fonda and Hayes (1998, p. 267) confirm these views and report that employers have become interested in what is called ‘core skills and competencies’. Gibbons-Wood and Lange (2000, p24) provide synonyms for the term ‘core skills’: soft skills, core competencies, key competencies, key skills, transferable skills and personal skills. ‘Core skills’ describes the transferable skills which underpin competent performance in all fields.

Gibbons-Wood and Lange (2000, p. 25) report that in modern Germany, core skills are developed when a trainee within the dual system attends two learning venues, the workplace and a part time vocational college. The trainee develops the relevant skills through on-the-job ‘learning by doing’ but also through further part time schooling.

Furthermore, according to Tsang (1999, p. 79), to ensure a broad education trainees must also study languages, politics, economics, anthropology and a range of other non-job specific areas thus ensuring that they have an increased understanding of past and contemporary
societal and economic developments. It is important to be aware that vocational/technical learning is more costly than academic learning; however, with favourable conditions the productivity of its graduates is raised.

Rowden (1996, p. 8) and Velde and Cooper (2000, p. 83) support this ‘broad learning’ approach and stress that an organisation must effect those changes necessary to produce a highly qualified, critical thinking and problem solving workforce using workplace learning as the heart to drive, create and maintain such a workforce.

Nel et al. (2001, p. 538) suggests that organisational renewal is a form of change and learning. In this regard Kast and Rosenzweig (1985) as quoted in Nel et al. (2001, p. 541) maintain that organisations are not necessarily destined for a life cycle of birth, growth, maturity, decline and death, although many aspects of such a cycle are apparent. Figure 2.6 shows the life cycle of an organisation (Allen, 1997, p. 18).
It is important to note from the figure that there is a time when the organisation is in a state of confusion due to the additional changes being initiated, and before the organisation starts up a new period of growth.

Nel et al. (2001, p. 423) refer to the organisational life cycle in terms of a ‘sigmoid curve’, where an organisation enters a period of experimentation, followed by a period of growth and development, before the curve reverses its trajectory and enters a declining phase. It is emphasised that to be successful, organisations must develop and initiate a new curve before the old one starts its downward slope.

Organisations must renew themselves and this usually occurs through a process of innovation and adaptation by management. This process is termed organisational learning (Nel et al., 2001, p. 545). Braham (1995,
p. 4) clarifies the term organisational learning as simply referring to an organisation that prioritises learning.

Allen (1997, p. 2) agrees, describing an organisation as one that takes every opportunity to learn and in the process makes it easy for all staff members to learn in any situation.

Matthews (1999, p. 27) cites Senge (1990) a supporter of the learning organisation concept. Senge describes learning organisation as:

“Where people continually expend their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspirations are set free, and where people together are continually learning how to learn together”.

From the literature it is clear that a learning organisation emerges as a result of the intentional action by an organisation in its attempt to transform itself through learning. All learning is directed towards encouraging individual thinking and group learning.

Braham (1995, p. 17) adds that becoming a learning organisation is not about emulating a model; rather it is about creating a learning environment. Learning organisations share common characteristics, but the most important is a willingness to continue learning. Gerard (2000) as quoted in Theron (2002, p. 18), also emphasises continuous learning for active learning organisations.

Hesselbein, Goldsmith and Beckhard (1997, p. 185) agree that if a learning organisation wants to build resilience and the adaptive capacity of everyone in the organisation, it must increase its collective intelligence, potential for relatedness and shared sense of meaning. To
ensure long term sustainability it is reiterated that leaders must create conditions where identity, information and relationships are dynamically connected around the system’s larger purpose. In the final analysis, sound learning hinges on relationships and culture (Smart, 2001, p. 258).

Nel et al. (2001, p. 547) state that there can be no renewal by the organisation as a whole, unless individuals and groups in the organisation are willing to alter patterns of behaviors. An indicator of an organisation’s ability to retain its competitive advantage is the rate at which it renews itself.

The researcher concludes that when an organisation is at its peak, it is time to become proactive and search for its next, new learning challenge. This can only be accomplished by the individuals who comprise the organisation, and only with their ‘core capabilities’. Organisational renewal will be successful when these individuals develop collaborative relationships, supported by a leader-led culture of learning.

2.4 CONCLUSION

This Chapter has explored the various important perspectives of learning in general and workplace learning in particular. Important findings within this Chapter are that:

- organisations should be viewed as organic,
- individuals should be developed based on a humanistic approach,
- action learning is effective when executed within an authentic work setting using on-the-job learning models, accompanied by an apprenticeship and cognitive apprenticeship instructional methodology, and
visionary leadership is required to change people at an emotional level, pushing individual core capabilities to positively affect and influence the organisation’s life cycle.

Balancing these aspects in the workplace will allow companies to develop highly committed workforces that will repeatedly outperform rivals in both profits and returns (Rowden, 1996, p. 105).

The following Chapter will provide an examination of the relevant features of learnerships.
## CHAPTER 3

FEATURES OF LEARNERSHIPS

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CHAPTER 3

FEATURES OF LEARNERSHIPS

3.1 INTRODUCTION

The aim of this research project is to develop a model that can be used by Human Resources (HR) professionals in business, Education Training and Development (E T and D) Practitioners, as well as E T and D consultants in South Africa, who are involved with the notion of learnerships. Before this is attempted, it is appropriate that relevant features of learnerships are examined and explained.

This precept will be the thrust of Chapter three, within which the ideas of apprenticeships, traineeships, learnerships, vocational education and training standards, and competence will be discussed. The literature study will draw information mostly from an international perspective, as there is little scientific data currently available in South Africa. Adrienne Bird, Senior Executive Manager: Employment and Skills Development Services; and Ian Macun, Executive Manager: Skills Development Planning Unit with the Department of Labour (personal communication: electronic mail, 29 May 2002), confirm this situation.

3.2 APPRENTICESHIPS, TRAINEESHIPS, AND LEARNERSHIPS

The concept of apprenticeship established itself centuries ago, but the terms ‘traineeship’ and ‘learnership’ are relatively new. The differences between these terms are discussed in the following sections.
3.2.1 Apprenticeships

According to the Encarta 98 Encyclopedia (Microsoft, 1997), apprenticeships can be traced back to about the 12th century in Mediaeval Europe when artisans found it beneficial to band together into ‘craft guilds’. An apprenticeship is defined as:

… a system of learning the skills of a craft or trade from experts in the field by working with them for a set period. The apprenticeship system was used extensively by the craft guilds in the Middle Ages.

Apprenticeship continued to be important in learning a trade until the Industrial Revolution in the 18th century, after which it was largely replaced by the factory system. Revived in the 20th century, it was used in industries that required highly skilled workers. Today the terms of modern apprenticeships are specified in a contract and are regulated by trade unions and laws (Encarta 98 Encyclopaedia, Microsoft, 1997).

The S.A. Pocket Oxford Dictionary (1993, p. 32) defines an ‘apprentice’ as a ‘learner of a craft, bound to an employer for a specified term in return for instruction, novice’. While a contractual relationship between an employer and an employee for the learning of a craft is implied, there could be more focus on the relationship, but not necessarily a contract. The assumption during this research project is that the apprenticeship, traineeship or learnership will involve a formal contract of employment and training.

Throughout history, men and women have obtained knowledge and learned skills in a variety of ways; through accident, observation, trial and error, formal and informal learning, and combinations of these.
Apprenticeship has a long history as a way of learning while working, particularly for the craft or trade occupations (Ray, 2001, p. 1).

In Australia the National Centre for Vocational Education Research (NCVER) remarks that a very significant feature of the country’s vocational education and training systems is the apprenticeship system. The system has been in place in one form or another in Australia since 1805 and was developed from the British system of indentured apprentices which has operated for hundreds of years (NCVER, 2000, p32). Indentured refers to ‘a written agreement between two or more parties, a contract’ (S.A. Pocket Oxford Dictionary, 1993, p. 379).

Apprenticeships and their variations are still used for the training of professional groups. Originally, an apprenticeship was used as a way of training for various professional occupations such as pharmacy, surveying and nursing. Lawyers are also trained through a form of apprenticeship known as ‘articles’, while medical graduates complete an ‘internship’ before being licensed. Such professional training has been administered by professional associations which was separate to the formal system for trade apprenticeships (Ray, 2001, p. 1).

Historically, apprenticeships in Australia conventionally involved people under 20 years of age. A four-year contract for trade apprenticeships include off-the-job training, in a Technical And Further Education (TAFE) college or other accredited provider, and on-the-job training. The training arrangements are covered by a legal contract that is binding on both the apprentice and his or her employer. Apprenticeships were restricted to certain trade-based occupations, largely in the manufacturing, building, construction, printing and hairdressing areas (NCVER, 2000, p. 32).

A fundamental feature of apprenticeship as a system of employment and training is that the design is directly to benefit both industrial parties:
apprentices and employers. Apprentices benefit from having guaranteed paid employment for some years and an opportunity to learn skills from qualified persons. Employers benefit from having an employee who becomes more and more productive as time passes (Ray, 2001, p. 1). The logic is that the high costs of employing first year apprentices, will be offset by the third and fourth year’s work value that the apprentices should be attaining, while receiving substantially less in wages than the qualified person.

In summary, Australia rates fourth in the world in terms using the apprenticeship system [2.1% of working population 15 – 64 years] whereas the dual systems of Switzerland, Germany and Austria all focus only on young people (NCVER, 2001b, p. 5)

3.2.2 Traineeships

In 1985 Australia introduced a new form of structured training for young people called ‘traineeships’. The intention was to expand structured training for young people to a range of new industry areas not covered by traditional apprenticeships, such as agriculture, horticulture, manufacturing utilities and transport. Recently, areas such as sales in retailing, tourism and hospitality have become more important (NCVER, 2000, p. 32).

Other reforms after this period were the relaxation of formal off-the-job training in apprenticeship and traineeships and age barriers on traditional apprenticeships were removed (NCVER, 2000, p. 32). These changes, together with the effects of a strong economy, have seen the growth of part-time apprenticeships, and the establishment of school-based apprenticeships (NCVER, 2001a, p. 2).
Subsequently, concerns have been raised about the quality of training and quality assurance, related to the growth of ‘on-the-job only’ traineeships (Smart, 2001, p36). This was largely due to empirical research, which indicated that both off-the-job and on-the-job training assisted apprentices in their learning (Harris, Willis, Simons, and Underwood, 1998, p. 10).

There is the common thread that exists between apprenticeships and traineeships; namely, the combination of off-the-job and on-the-job learning (Strickland, Simons, Harris, Robertson, Harford, and Edwards, 2001, p. 10). Trainees are paid lower wages than fully trained workers already trained and working in the same occupational area (NCVER, 2000, p. 32).

3.2.3 Learnerships

Professor Ian Bellis, a well known practitioner in the field of competence-based education, training and development in South Africa, comments that learnerships are similar to apprenticeships in that both are ‘both a work-based route for learning and gaining a qualification’ (Bellis, 2000, p. 218).

In South Africa the Manufacturing Engineering and Related Services Education and Training Authority (MERSETA) has learnership guidelines for employers, employees and training providers. These guidelines corroborate and confirm that a learnership is a structured process for gaining theoretical knowledge and practical skills in the workplace. Learners learn off-the-job and on-the-job skills to obtain work experience and a qualification. A learnership leads to a nationally recognised qualification that is made up of unit standards or outcomes of learning (MERSETA, 2002c, p. 3).
The Skills Development Act of 1998 makes provision for learnerships as a new system of learning in which the Department of Labour sees learnerships as tools to achieve a ‘set of transformations’. According to Bellis (2000, p. 218) these transformations include:

- addressing problematic features in the South African labour market by aligning education and training initiatives more closely with labour market needs, and
- building a relationship between structured learning and structured work experience that equips learners with new kinds of competence as required by the labour market.

MERSETA believes that learnerships should align training interventions to labour market needs. These training interventions are intended to help meet the skills shortage in South Africa and are identified and recognised by industry, providers and learners themselves (MERSETA, 2002b, p. 3).

In South Africa, learnerships differ from apprenticeships in several important ways. Bellis (2000, p. 219) argues that learnerships:

- are in response to a demonstrable need,
- do not include the traditional trades but any occupation in which it is possible to structure work-based learning paths,
- may be wider than that which is offered under the single employer, as is with apprenticeships,
- have wider and richer content with regard to a development base, and also while being specific to an occupation will develop employability across a wider spectrum of work, and
- are intended for those who are employed and also those who are not yet employed.
Australian commentary contributes to the view that Bellis takes and reports that one of the key differences between apprenticeships and traineeships is the emphasis placed on skill formation. Within apprenticeships there is an expectation of a skill formation process, whereas traineeships are often seen as primarily providing employment pathways (Strickland et al., 2001, p. 16).

One can thus deduce that apprenticeships and learnerships are aimed at different levels of skill formation, as indicated by the National Qualifications Framework (NQF) level, and serve as entry into the labour market as well as into an occupation.

The NCVER (2001a, p. 6) support this position by stating that the main difference between apprenticeships and traineeships relate to:

- the occupation in which the training is occurring, and
- the Australian Qualifications Framework (AQF) level or qualification being sought.

Learnerships offer an exciting opportunity to develop and manage the ways in which individuals achieve occupational competence. A learnership is not a qualification, although it could lead to a qualification (Bellis, 2000, p. 218). Strickland et al. (2001, p. 59) support this arrangement and indicate that apprenticeships and traineeships serve two objectives. The first objective relates to entry into the market place and the second relates to the provision of training pathways that would lead to recognised qualifications.

Bellis (2000, p. 220) points out that learnerships are achieved by the same way as when delivering any learning/teaching/training and facilitating opportunity.
The researcher concludes at this point that the South African concept of learnership, and the Australian concept of traineeship are similar, as they are both intermediate phases to a qualification.

When a learner commences a learnership, a learnership agreement must be compiled. This agreement is an instrument to implement and manage the learnership. The learnership agreement is a legally binding document which outlines the rights and duties of the learner, provider and employer (MERSETA, 2002b, p. 8).

All learnership agreements must be formally registered with a SETA to register learner credits and for the employer to claim discretionary grants (MERSETA, 2002d, p. 7). The SETA in turn registers the learnership agreement with the Department of Labour (MERSETA, 2002b, p. 11).

According to du Plessis, Fouché and Van Wyk (1998, p. 144) the learnership agreement terminates on the date stipulated, or earlier if:

- the learner successfully completes the learnership,
- the learner is fairly dismissed by the employer for a reason related to the learner's conduct or incapacity,
- the employer and learner agree to terminate the agreement, and
- the SETA approves a written application to terminate the agreement by the learner, or if good cause is shown by the employer.

It is important to note however that a separate contract of employment must be signed specifying the minimum conditions of employment. The contract must comply with the Basic Conditions of Employment Act and any Sectoral determinations (du Plessis, Fouché and Van Wyk, 1998, p. 144).
The overall success of the learnership project must be evaluated. MERSETA (2002b, p. 12) believes a learnership will be deemed successful if:

- the learner achieves competence within the stipulated time frames,
- the learnership has led to an increase in productivity levels,
- the learner has found placement following the learnership, and
- current employees have been able to progress in their career path.

Assessment recognises whether the learner is competent and awards credits towards the learnership qualification. It also provides feedback to the learner on areas that may still need improvement (MERSETA, 2002c, p. 7).

Formative assessment is conducted during learning and is a way of assessing how the learning is progressing, while providing feedback to the learner towards the goals identified. Anyone involved in the learner's work or who may have subject matter knowledge may conduct formative assessment. Summative assessment occurs at the end of the learning process and involves the gathering of evidence and making a judgement as to whether the learner has met all the competence requirements. Only a registered assessor may conduct summative assessment (MERSETA, 2002a, p5, p. 8). The assessor's role can be described as follows:

- planning the assessment,
- conducting the assessment,
- gathering evidence of competence,
- making judgements on the evidence i.e. either competent or not yet competent,
- providing feedback to the learner,
- completing the necessary company and SETA documentation,
- planning for re-assessment if necessary, and
• reporting on the assessment decision.

MERSETA’s learnership guidelines for employers (2002b, p. 3) list benefits of learnership implementation for employers. Effective learnership implementation:

• provide an appropriately skilled employment pool to draw new entrants into organisations,
• enable a company to increase its market share due to a skilled and competitive workforce, and
• produce skilled learners who will contribute to the economic growth and development of the country.

Essentially the standard of competent assessment will provide the ‘main stay’ of learnerships and thus assessment must be seen as a critical success factor that must undergo close scrutiny.

Toop, Gibb and Worsnop (1994, p. 9) confirm this view and state that an assessment system is not only a means whereby assessment decisions are made in relation to many individuals, by many assessors, in many situations. The expectation of an assessment system must foster public confidence, be readily accessible while operating efficiently and effectively.

3.3 VOCATIONAL EDUCATION AND TRAINING STANDARDS

Training standards are an integral part of the learnership concept and are discussed in the following sections.
3.3.1 The issue of terminology

The European Training Foundation (ETF), in recent discussions on European reform and further developments of vocational education and training, revealed that new concepts and terms are constantly re-appearing and changing. In addition, at a national level there has been a diversity (if not confusion) of terms, which of course increases as international dialogue and comparative analysis increases (ETF, 2000a, p. 1).

Bellis (2000, p. 45) shares this view and mentions that one of the most important issues that relates to the quality in a system are the words and concepts that are central to approaches, outcomes and competence, skill and performance. According to Berg, Theron, Albertyn, Bardenhorst, Geldenhuys, Ungerer, Cilliers, and de Koker, (1999, p. 142) concepts help individuals to categorise different objects and events according to their similarities.

English terms are increasingly being used in the international dialogue on vocational training. However, many different words are being used interchangeably as if they mean the same thing. Collecting and comparing definitions will establish common features of the definitions as well as classifying and grouping terms frequently used (ETF, 2000a, p. 1).

It is in this light that a pre-requisite to understanding the vocational education and training systems of other countries is needed to obtain clarity with regard to terms used. If concepts and terms are not sufficiently clarified, it could lead to obstacles in reform and improvement.
3.3.2 Training standards as an element for transformation

The European Training Foundation (1999, p. 3) together with various other authors (Gill and Dar, 1996, p1; Van Dyk, Nel, Van Z Loedolff, and Haasbroek, 1998, p. 3; Van Dyk, Nel, Van Z Loedolff, and Haasbroek, 2001 p. 4) confirm that many countries’ vocational education and training are currently undergoing transformation as a direct consequence of fundamental political, economic and social re-direction.

In this context, the development of a modern, forward looking vocational education and training standard is considered to be very important. Market economy structures often necessitate increased, and frequently completely different requirements in terms of the general abilities, knowledge and skills needed by employers at the intermediate qualification level [apprenticeships and learnerships]. These requirements are documented in vocational education and training standards (ETF, 1999, p. 3).

From a European Union perspective, there are major differences in the way vocational education and training standards are formulated. Figure 3.1 sketches the factors that influence and shape vocational education and training standards. Factors such as a country’s political goals, economic circumstances, societal variables, and the historical forces influence both the defining of vocational education and training standards, as well as the methods for putting them into practice (ETF, 1999, p. 4).

There are significant areas of change which have an impact on the development of vocational education and training standards. The most important of these are the changes in technology, legislation, markets and organisational culture (ETF, 2000b, p. 21). Some of these changes
are extremely rapid and difficult to predict (e.g. technology) whilst others are more easy to anticipate (e.g. legislation).

Figure 3.1: Factors which influence and shape vocational education and training standards/occupational standards.

Source: ETF, 1999, p. 3.

Vocational education and training standards need to be constantly updated, in some cases fundamentally revised or even completely re-developed due to the fact that known established occupations and activity areas are disappearing from the labour market and being replaced by new occupations and competence requirements (ETF, 1999, p. 9).
The Australian National Training Authority (ANTA) promotes a similar view to the currency of training standards and states that as industries develop standards, it is important to pin-point current and likely changes, and to identify the skills requirements emerging from these changes. Benchmarking these standards within Australia and internationally is one way of approaching this dilemma (ANTA, 2001b, p. 6).

In order to develop standards in an appropriate and country specific manner, and which also reflect global trends, each country needs a research institute that addresses this task in a systematic and ongoing manner and ensures that the social partners, experts from companies, training practitioners and trainees, as well as competent scientific experts, are involved in the development process (ETF, 1999, p. 10).

South Africa has identified that a country cannot improve its vocational education and training system without objective information gained from a research perspective. This has given rise to the Skill Development Planning Unit (SDPU), which has the sole purpose of documenting vocational education and training data related to South African skills needs. The SDPU collects, analyses and disseminates labour market information to ensure that the national skills development strategy is accurate and responds to the needs of the economy (Mercorio and Mercorio, 2001, p. 71).

The National Centre for Vocational Education Research in Australia similarly has responsibilities for developing and implementing Australia's national vocational education and training research and evaluation effort. The NCVER collect and report national statistics and other information about vocational education and training (NCVER, 2000, p. 10).

3.3.3 Training standards clarified
The European Training Foundation (1999, p. 4, p. 6) stresses that standards are compulsory for all those involved in vocational education and training. The functions that vocational education and training standards serve are as follows:

- they ensure and assure the quality of vocational training,
- they guarantee transparency, and
- they ensure that certificates are comparable irrespective of the school/training institute or company in which it was acquired.

Standards in vocational training are economically and educationally important as they are the prime instrument to ensure relevance, transparency and quality of the outcomes of the education and training process (ETF, 2001, p. 1).

Further standards in vocational training are an interface and a link between the education system on the one hand and the labour market on the other. They bring together the goals of education and the labour market. Figure 3.2 draws attention to the relationship between vocational education and training standards within the education sector (general education, higher education) and the labour market. It should be noted that this would vary depending on the vocational training policy of a country, and its statutory foundation (ETF, 2000a, p. 7).

Figure 3.2 draws attention to an important difference that must be borne in mind. On the one hand there is the labour market classification of employment occupations and jobs, and on the other a register of educational occupations which are important for the structuring of vocational education and training.
Figure 3.2: Occupational/vocational education and training standards (qualifications) – interface between education and the labour market.

Source: ETF 2000a, p. 7.

These two occupational classifications are not identical as there are many employment occupations compared with the number of
educational occupations. If one has learned a recognised occupation in the education system, then one has access to a whole range of jobs, comprising an occupational family of jobs, in the labour market. This has led to a reduction in the number of recognised occupations, and modified training profiles (ETF, 2000a, p. 7-8).

There is clear distinction between occupational standards, which are part of the labour market and employment system, and occupational standards which are part of the education system.

The definition for a vocational education and training standard used in most European vocational education and training systems refers to the competence required for the work activity, normally linked to a description of the respective assessment requirements/assessment criteria. The following definition of a vocational education and training standard is cited (ETF, 2000a, p. 9):

"Standards are (generalised) descriptions of work activities linked with the outline of the appropriate (relevant) knowledge, skills and abilities (competence)".

Vocational education and training standards can have further variations according to their general or specific nature, or their proximity or distance from real labour market requirements. The four variations of the vocational education and training standards are cited in figure 3.3 (ETF, 2000a, p. 11).

The variations referred to in the figure are: job-based, occupational, vocational and general vocational. The term occupational refers to a well defined occupation (e.g. apprenticeship training). Vocational education and training systems that are orientated more towards in-company areas of activity, or functional areas, prefer the term 'vocational'. It is not an
occupation made up of various work areas, but an acquisition of skills for an area of work activity (e.g. marketing) (ETF, 2000a, p. 11).

Vocational education and training systems which in practice are not yet orientated towards the labour market and company requirements, and orientated themselves towards traditional subjects or disciplines, are called general vocational (e.g. electrical engineering). The counterpart to this general vocational orientation is job-based. This involves developing the knowledge, skills and abilities required at a specific company workplace. This type of training is increasingly being used to supplement vocational education and training.

Figure 3.3: Different versions of vocational education and training standards depending on vocational education and training policy.

Source: ETF, 2000a, p. 10.
broad general vocational training in order to get unemployed young people into work (ETF, 2000a, p. 11).

Learnerships should use these versions of vocational education and training standards that would define its occupational specific standards, and then utilise job based standards to develop competence.

In South Africa the term ‘unit standard’ has been coined. Unit standards are seen as key building blocks of a qualification registered on the NQF. The regulations define unit standards as statements of desired education along with training outcomes and their associated assessment criteria together with administrative and other information (Mercorio and Mercorio, 2001, p. 100).

These outcomes should be agreed upon by many stakeholders to meet the diverse needs of individuals and society, including business, tertiary institutions, cultural organisations and government. The South African version of a vocational education and training standard has been developed to include broader competence with a high level of general content (Hallendorff, Richardson and Wood, 1999, p. 4).

3.3.4 Training standards for learning and assessment

Strickland et al. (2001, p. 24) argue that assessment in apprenticeship and traineeship is often thought of as a process that occurs at the end of learning. However, it is a key component that supports learning in the workplace.

Harris et al. (1998, p. 127) report that employers use overt processes that involve learners taking an active part in assessing their work. In other instances, covert processes are used where the process takes the
guise of a problem that is presented to be solved. This process is seen as integral for the development of a skilled person.

The use of competency standards lies at the heart of assessment processes. The process aims to determine an individual’s status in relation to these standards through a variety of processes which enable an inference of competence to be made (Strickland et al., 2001, p. 24). The NCVER (2000, p. 2) explain that it is becoming increasingly difficult to meet Australia’s skill needs, and it will become increasingly important in the future to re-train older workers and recognise prior learning to speed up skill acquisition when occupational changes are made.

Assessment against vocational education and training standards can be used as a benchmark to show the level of occupational skills that individuals have acquired, irrespective of how their skills had been obtained. This could take place through work experience, self instruction, or earlier education and other forms of qualifications (ETF, 1999, p. 7).

The Australian vocational education and training system uses ‘Recognition of Prior Learning’ (RPL) and comments that the use of this approach must provide assessment pathways for the recognition of competencies previously attained (ANTA, 2001a, p. 10). Similarly, South African unit standards also provide an opportunity to benchmark learning achievements, and to articulate learning pathways for individuals (Babb, 2001, p. 32).

Vocational education and training standards are particularly used in countries where large groups of the population have not received any recognised vocational education or training (ETF, 1999, p. 7). The researcher believes that South Africa will be able to use this approach as previously very little vocational education and training was conducted for
the greater population. This method will have to be used to recognise all formal, informal and non-formal learning acquired historically.

Mercorio and Mercorio (2001, p. 88) corroborate the researchers view and comment that the South African Qualifications Authority Act (SAQA Act, No.85 of 1995) gave rise to the National Qualifications Framework (NQF). The unit standards registered on the NQF can now be used as instruments for RPL purposes.

The European Training Foundation (2000a, p. 14) argues that there are, down sides to the assessment-only method of competence, as only the outcomes of individual achievements are assessed. The competence of assessors becomes critical, as the final assessment is the sole evaluation instrument used. If only a final assessment is used, then the assessment method and processes need to be of high quality to produce valid and reliable assessment decisions.

Figure 3.4 illustrates this problem. There is always the risk in a final assessment that all competencies may not be fully assessed, however, this situation is exacerbated when there is a free choice of curriculum and in the type and manner of competence acquisition. In conjunction with the accreditation of prior or informal learning, this problem becomes acute (ETF, 2000a, p. 14).
As can be seen in Figure 3.4, the competence that will ultimately be reflected by the assessment process will be either a sum of all learning and experience to date, or a reflection of the assessment process. This recognition of prior learning approach creates a dilemma for many vocational education and training systems, as it should establish a record of past learning. However, if flexibility is permitted, the reliability of the assessment must be assured by concentrating resources towards assessment (ETF, 2000a, p. 14).

The researcher postulates that assessment of competence can be severely undermined or greatly enhanced depending on the quality of assessment decisions made.
3.4 A MODERN APPROACH TO COMPETENCE

The term ‘competence’ is difficult to define clearly in terms of content and general validity, since it is a theoretical construct. Competence is not primarily a matter of the transfer of individual technical, or operational knowledge, skills and abilities, but more a broadly useable and holistic transferable competence that should be developed in vocational training (ETF, 2000a, p. 11).

In determining the level of competence that has been acquired, outcomes of learning are assessed through a variety of assessment methods. In many systems, other important factors will be taken into account in the evaluation of the training programme. The European Training Foundation (2000a, p. 13) offers the following examples:

- the content of the training course, the methods used and, where appropriate, the experience gained at various learning sites,
- any existing knowledge and skills and competence developed outside formal training courses,
- the individual character-specific pre-conditions and opportunities which the individual has, and
- the qualifications of trainers.

Figure 3.5 demonstrates which opportunities at the end of the figure are linked to the four types of vocational education and training standards, and the level of competence required (ETF, 2000a, p. 13).
Figure 3.5: Dependence of competence development on the quality/structure of the vocational education and training standards in a vocational training system (typical models).

Source: ETF, 2000a, p. 13.
Current emphasis is on the promotion of individual personality development as this has a major role to play in building the capacity of the individual. A trainee or employee should not merely ‘be drilled’ for specific workplaces, rather vocational education and training must endeavour to promote the individual’s potential (ETF, 2000a, p. 16).

Against this backdrop a distinction can be made between the components of ‘occupational/vocational competence’ as shown in figure 3.6. When combined, they enable the holder to successfully tackle work activities and situations in the world of work and to develop his or her personality (ETF, 2000a, p. 16).

Figure 3.6: Components of occupational/vocational competence (modern approach).

Source: ETF, 2000a, p. 16.
Bellis (2000, p. 47) shares this modern approach to competence. He states that human learning is not only something the learner ‘does’ while completing a task (physical action); ‘it is what the learner does in and with the mind, in and through the hands, and in and through values and feelings’. Bellis indicates that this approach to learning falls into three domains, and has been based on the work of Bloom (1963 and 1964) and his associates who refer to the cognitive (the intellectual), the affective (the value and relationship-based), and the psychomotor (the physical or mind-hand) domains of learning. The emphasis of learning is on gaining, and becoming aware of something happening to the whole person.

A definition of modern competence proposed by Bellis (2000, p. 60) is increasingly being adopted by industrial, commercial and educational institutions:

“A skill or integrated cluster of skills executed (carried out) within an indicated range or context to specific standards:

- standards of performance (relating to quality, expressed in various ways),
- standards of integrated understanding of the performance and its knowledge base,
- standards of understanding of the system in which the performance is carried out,
- standards of the ability to transfer to other related contexts, and
- standards of the ability to innovate when appropriate”.

The term ‘skill’ is further clarified by Bellis (2000, p. 61) within the context of the understanding of competence as ‘a generalised, performed ability in any domain (cognitive, affective and psychomotor) of learning and endeavour’.
Bellis (2000, p. 61) suggests that the definition of competence is clearly attempting to move the idea of skill and competence away from the psychomotor domain in the area of physical skills into the broader spectrum of cognitive and affective domains.

Bellis (2000, p. 65) stresses that competence and skills development processes should have consistent meanings, and indicates in figure 3.7 how the terms and concepts used, relate to each other, each within an ever expanding ellipse.

Figure 3.7: Concepts related to competence.

Source: Bellis, 2000, p. 65.
Bellis (2000, p66) sums up competence appropriately, as:

… the way we think, the ideas we hold, the way we understand concepts, and the belief in the value that we commit to them drives how we act, what we do, and what we help to create’.

The Australian vocational education and training system is also based on the concept of competency. The Australian National Training Authority apply the modern approach to competence, and outline that competency is far more than the skills an individual is able to perform. They describe competence as a ‘hands on’ and ‘head on’ approach and is equally about the knowledge that an individual brings to the application of these skills. This approach encourages multiskilling and the ability to transfer competency to new situations. This leads to improved flexibility and portability of skills across the workforce (ANTA, 2001b, p. 2).

Competency comprises the specifications of knowledge and skill and the application of that knowledge and skill to the standard of performance required in the workplace. This modern approach to competency encompasses a range of features (ANTA, 2001b, p. 3):

- the concept of competency focuses on what is expected of an employee in the workplace rather than on the learning process, and embodies the ability to transfer and apply skills and knowledge to new situations and environments,
- in competency standards the emphasis is on outcomes and on the application of skills and knowledge, and
- competency standards are therefore concerned with what people are able to do, and also with the ability to do this in a range of contexts.

A final, but key aspect on the Australian definition of competency is that standards should provide the basis for skill formation now, and in the
future. Competency standards should capture the ability to apply skills in new situations and changing work organisations, rather than reflecting the tasks currently performed (ANTA, 2001b, p. 6).

Mansfield (1996, p. 6), a prominent international Human Resources research and development consultant in the United Kingdom, supports this futuristic view of competence and asserts that:

… to meet the competitive demands of our economy, our view of competence needs to be firmly based on a broad and strategic view of a competent workforce, one which moves beyond the rhetoric of political statements into practical approaches which will lead to improvement and development; not a replication of what we already know to be inadequate.

The researcher concludes that an application of the modern view of competency must be an essential feature in any world-class training system.

3.5 CONCLUSION

This Chapter has reviewed the features of apprenticeships, traineeships and learnerships. Important findings in this Chapter include:

- It is apparent that the Australian concept of traineeships addresses the same elements as the South African concept of learnerships,
- these elements relate to access and entry into the labour market through periods of off-the-job and on-the-job learning,
- vocational education and training standards must be of high quality and forward looking, and
- modern competence relates to physical, intellectual and value orientated dimensions.
Training standards are important as the quality of the standards largely determine the quality and effectiveness of a country’s training system (ETF, 1999, p. 4).

The following Chapter will outline various vocational, educational and training models. Thereafter, a proposed model for the establishing, implementing and managing of learnerships in South Africa will be offered.
CHAPTER 4

DEVELOPMENT OF A PROCESS MODEL FOR EFFECTIVE LEARNERSHIP IMPLEMENTATION

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4.7 CONCLUSION
CHAPTER 4

DEVELOPMENT OF A PROCESS MODEL FOR EFFECTIVE LEARNERSHIP IMPLEMENTATION

4.1 INTRODUCTION

According to Lindeque and Verster, as quoted in Van Dyk, Nel, Van Z Loedolff and Haasbroek (1998, p. 9), winning nations have amongst others, a number of characteristics in common. One of these characteristics is that the German Vocational Education and Training (VET) system be used as a benchmark in the country's VET system.

Van Dyk, Nel, Van Z Loedolff and Haasbroek (2001, p. 462) state that the apprenticeship system in South Africa has been declining with technical college education and training, on average producing poor outcomes. Barker (1999, p. 222) confirms the apprenticeship decline and states that during most of the 1980s the number of new indentures declined from 14 497 in 1982 (a high point) to 5 648 in 1997.

The problem of strengthening the links between education and employment is that it tends to preoccupy policy makers in all countries. In countries that are growing rapidly, this preoccupation stems from the concern that the economy's demand for skilled workers will outstrip its supply. In countries where economic growth is slow, the concern may arise as a result of growing youth unemployment. In both cases, this attention often turns into efforts to vocationalise the curriculum, or create incentives for employers to participate in apprenticeship/skills training (Gill and Dar, 1996, p. 1).

A learnership process model for organisations to vocationalise workplace learning is presented in this Chapter. The process model is based on the
themes that have emerged from previous Chapters, together with the various models and current practices discussed in this Chapter.

4.2 A MODEL

As stated previously, Bellis (2000, p. 180) expresses the term model, as interconnected relationships between the main components or elements of a ‘system’. Thomas and Robertshaw (1999, p. 125) agree and state that ‘any proposed’ model is not an attempt to reduce highly complex matters into a simple schematic. Rather they feel that a model represents the way in which researchers have organised their thoughts on complex processes. Toop, Gibb and Worsnop (1994, p. 10) add that when using models, they should be interpreted and contextualised in terms of the applicable industry and organisational circumstances.

The process learnership model developed in this Chapter should be interpreted in terms of the ‘systemic’ view of the term model.

4.3 THE AUSTRALIAN TRAINEESHIP SYSTEM

When initially setting out to develop learnership policy, South African decision-makers were interested in the Australian traineeship concept. This fact together with the various SETA’s in South Africa interacting with their counterparts in Australia has prompted the researcher to review aspects of traineeship application in Australia (personal communication: electronic mail, Adrienne Bird, Senior Executive Manager: Employment and Skills Development Services with the Department of Labour, 24 October 2002).
4.3.1 A quality traineeship system

The researcher will outline the Australian ‘quality traineeship system’, as based on a research study undertaken on one’s approach to traineeship in Queensland Australia.

Schofield (1999b, p. 7) declares that quality can be a relative and often vague concept, used legitimately in different ways by different stakeholders to mean different things. It is especially complex when applied to services rather than products, specifically in aspects of instruction and learning.

Schofield (2000c, p. 8) proposes to define this broad concept of quality while being consistent with the views of the Australian National Audit Office:

In its broadest sense … quality incorporates assessment of outputs, processes and outcomes and takes into consideration the relevant objectives and resources. Assessment of quality involves the use of information gathered from key interests … to identify differences between expectations and experiences of users.

Quality must be evident not only in the traineeship system when taken as a whole, but also in relation to each of the major components of the system. It cannot be injected post hoc. Nor can it be confined to the quality of business processes; it must include the quality of the outcomes (Schofield, 1999a, p. 10).
The following aspects of quality provide for a broad template used to assess the overall quality of the traineeship system in Queensland (Schofield, 2000c, p. 8):

**Effectiveness:** Is the traineeship system achieving what it is intended to achieve?

**Fitness for purpose:** Do traineeships conform to specifications? Do they meet the expectations of customers? What is the incidence of service failure?

**Efficiency:** Do the resources used, the programme delivery processes and activities, the purchasing system and the outputs from the traineeship system deliver value for money to the taxpayer?

**Accountability:** Are all individuals and organisational stakeholders at all levels answerable for their plans, actions and their role in achieving the objectives of the traineeship system?
Due to the sheer size and complexity of traineeships and managing traineeships, Schofield (1999b, p. 2) proposes an approach that may be used in investigating the quality and effectiveness of traineeships. There is a tendency to focus attention on the problems with individual business processes or transactions. However, it is more helpful if a more ‘holistic systems’ perspective is taken and individual problems associated with traineeships are then viewed through a wider lens. The ‘quality traineeship system’ is considered as a business system, comprising of ten inter-related components as illustrated in figure 4.1.
Table 4.1 identifies some of the characteristics, which need to be present in each of the system components to produce a quality traineeship system (Schofield, 1999b, p. 10).

<table>
<thead>
<tr>
<th>Component</th>
<th>Characteristics of quality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Labour market need and demand</td>
<td>Both needs and demand for traineeships, from both employers and trainees must exist. If demand is not commensurate with the need perceived by government and industry, appropriate incentives may be introduced by government to stimulate demand to the required level, having regard to both intended and un-intended consequences of such incentives.</td>
</tr>
<tr>
<td>Employer trainee - contractual relationship</td>
<td>The relationship of trust between an individual employer and an individual trainee is the foundation of the traineeship system and is defined contractually. Accountabilities are clear and mutual rights and obligations are defined.</td>
</tr>
<tr>
<td>Employment – based training programme</td>
<td>The contents of the training is structured, sequenced and presented in ways that maximise the potential of trainees to achieve competence. Competence is ethically assessed and certified with a nationally recognised qualification.</td>
</tr>
<tr>
<td>Specified outcomes</td>
<td>The outputs and outcomes required from the traineeship system are clearly specified at every level. Accountabilities for achieving outcomes are clearly specified.</td>
</tr>
<tr>
<td>Legislation and regulation</td>
<td>Legislation and regulation set out the rules, and by inference, the values and ethical standards by which all must abide. Regulation is appropriate to the needs and culture of the traineeship system. Rules are few, clear and precise and are administered impartially.</td>
</tr>
<tr>
<td>Public policy</td>
<td>Public policy provides a sound framework for decision making within the traineeship system.</td>
</tr>
<tr>
<td>Planning</td>
<td>Stakeholders understand, on the basis of evidence what training is likely to be required, by whom and when, based on short, medium and long term planning requirements. This understanding forms the basis of resource agreements; flexibility in planning is evident.</td>
</tr>
<tr>
<td>Financial agreements and contracts</td>
<td>Resources are allocated efficiently across the traineeship system to ensure the outputs and outcomes are achieved, having regard to the impact on resource arrangements within the wider vocational education and training system. Resources are allocated and services purchased based on good financial modeling and clear outcome specifications.</td>
</tr>
<tr>
<td>Performance management</td>
<td>A quality traineeship system operates within a strong performance management framework, underpinned by robust performance information. Desired levels of performance are specified in relation to inputs, processes, outputs and outcomes. They are set at different levels and through open and co-operative relationships between stakeholders. Performance is monitored on an on-going basis and complemented by periodic strategic evaluation.</td>
</tr>
</tbody>
</table>
Management and administrative systems

| Management and administrative systems | All supporting management and administrative systems actively contribute to a quality traineeship system. They are modern, consistent, simple, fast, reliable, cost-effective and easily accessed by all users. They are based on sound business processes and are developed and managed within a strong risk management framework. |

Table 4.1: Quality characteristics of the quality traineeship system.

Source: Schofield, 1999b, p. 10.

All judgments about quality in the traineeship system will be derived directly or indirectly from the purpose or objective of the traineeship programme. The primary purpose of traineeships since its introduction in 1985 has moved along five principle axes as illustrated in table 4.2. These will change, with changing circumstances in employment, the training environment and changing policy priorities (Schofield, 1999b, p. 3).

Schofield sums up the quality traineeship system by emphasising, that all components must work together with the quality characteristics apparent, before a system can be regarded as a quality system (Schofield, 1999b, p. 3).
Primary Objectives

To develop vocational skills.
To stimulate job creation with some skills development.
For new entrants to the workforce.
For existing workers.

Secondary Objectives

To support new and emerging industries.
To support existing industries.
To develop entry-level skills (Australian Qualifications Framework 1-3).
To develop middle-level skills (Australian Qualifications Framework 6).
Through on-the-job and off-the-job training.
Through fully on-the-job training.

Table 4.2: Potential objectives of the traineeship system.

Source: Schofield, 1999b, p. 4.

Once these have been considered judgments can then be made as to whether the traineeship system is achieving the primary objectives as set out in the initial programme by asking the four broad questions to assess the overall quality of a traineeship system:

- is the traineeship system effective?,
- is the traineeship system fit for purpose?,
- is the traineeship system efficient?, and
- is there accountability in the traineeship system?
4.3.2 Research findings and additional comments from the Queensland traineeship review

Schofield (2000c, p. 14) makes additional comments and stresses that the quality of the learning outcomes from traineeship programmes depend on the capability of the Registered Training Organisation (RTO) [training provider] and its compliance with the various standards of training delivery and assessment.

Schofield (2000b, p. 4) also emphasises that the suitability of the workplace as a site for learning for off-the-job training and the learning environment offered by the workplace for planned on-the-job learning, become key ingredients in the quality of training. This shared goal by all stakeholders will bring significant improvements in the quality of traineeship training. This is essential if industries and workers are to be globally competitive.

Strickland, Simons, Harris, Robertson, Hartford, and Edwards (2001, p. 26) and Misko, Patterson and Markotic (2001, p. 176) concur with Schofield and state that the opportunities for improvement relate to adequate preparation of employers, trainees and RTO mentors prior to commencing the training programme, re-visiting of policy about consecutive contracts of training and broadening the range of training experiences available to trainees.

Schofield (2000c, p. 15) raises concerns about the long-term sustainability of the traineeships system due to the different workforce requirements of the new economy. Ray (2001, p. 36) together with various other authors (Schofield, 2000a, p. 1; Schofield, 2000b, p. 2; Schofield, 2000c, p. 15; Hawke, 2000, p. 4; Chappell, 2002, p. 1) cite evolutionary changes in the operation of the labour market, the
employment and training environment that may impact on skill requirements in the future:

- technological change: the increasing role of computers and the internet, loss of jobs in traditional areas,
- economic change: substantial outsourcing, short term business plans, small business growth due to contracting-out, limited outlook for employer to enter into four-year apprenticeship contracts,
- change in nature of work: casualisation and specialisation of work, low growth in full-time jobs, and
- social change: sees the rise of ‘individualism’ at the expense of communities, the loss of ‘social capital’ as large employers who trained skilled workers excess to own requirements ceased skills training.

Schofield (2000c, p. 16) provides a summation of the current and future state of the traineeship system in Australia:

… As with almost every other facet of economic and social life, the traineeship system; born and bred in the old economy is struggling to come to terms with its form and place in the new global economy.

The researcher notes that the findings from the Queensland traineeship review have identified significant gaps for a system that has been operating for approximately 14 years. These gaps, however, have evolved as a consequence of the demands of new economy, which places tremendous pressures on all resources and components of the traineeship system. It is vital that these pressures are noted and addressed. Adequate resources must be made available to avoid potentially detrimental or average learning outcomes in learnerships.
4.4 AN OVERVIEW OF THE VOCATIONAL ACADEMY

Much has been written on Germany’s approach to its traditional Vocational Education and Training (VET) system, with the apprenticeship model being well developed (Weihrich, Seidenfuss and Goebel, 1996, p. 31).

A new approach is proposed which goes beyond apprenticeship training. The apprenticeship model and the Vocational Academy (VA) fulfill a need for a higher level dual system education via an educational joint venture (Weihrich, Seidenfuss and Goebel, 1996, p. 32).

The researcher will review the traditional dual system, examine the new VA model, and finally provide an evaluation of the approach.

4.4.1 The vocational academy examined

Weihrich, Seidenfuss and Goebel (1996, p. 31) propose that the apprenticeship model needs to be supplemented by a higher level dual system education, which integrates theory and practice. What is proposed is a new approach which goes beyond apprenticeship training: a VA which is neither government nor industry dominated, but a joint venture between the two interest groups.

Weihrich, Seidenfuss and Goebel (1996, p. 31) postulate that both the apprenticeship model and the VA model fill an important need for making business and government organisations more competitive in the global market.

The VA focuses on work related subjects with an emphasis on problem solving. The partnership agreement between participating employers, a government funded institution and government has objectives of work
related higher learning in the following areas (Weihrich, Seidenfuss and Goebel, 1996, p. 35):

- to integrate training facilities of the employment sector and state educational institutions in a joint effort at co-operative education of the highest standards,
- to respond to employer demands for greater work orientation in higher education, and
- to give those students completing the programme an attractive option of post secondary education, while reducing the time students spent in tertiary education (three years at the VA versus more than six years on average at German universities).

Figure 4.2 shows the strong commitment to these goals by employers and educational institution. Employers and educators jointly set the objectives and standards, determine the content of training and decide the academic requirements. Both parties share the responsibility for governing and curriculum development. In operation of the programme, the on-the-job training and the academic course work are shared by the liaison and co-ordination committee. The responsibility for controlling performance is also shared by employers and VA educators (Weihrich, Seidenfuss and Goebel, 1996, p. 36).
Trainees spend 12 weeks at the Academy in lectures, seminars and practical exercises. They also work for 12 weeks in the company, where they learn about the structure and tasks of the various business functions. Individual learning plans are prepared jointly by the company and the VA (Weihrich, Seidenfuss and Goebel, 1996, p. 38).

A person enrolled in the VA, is both a student of the Academy and a trainee with an employer who pays a training allowance and bears the
cost for the time a student attends the Academy. The conditions of the
traineeship are governed by a training contact (Weihrich, Seidenfuss and

The VA considers itself a learning organisation that through periodic
evaluations of the course contents and learning processes, holistic
learning is emphasised and the material taught is up to date (Weihrich,

4.4.3 Evaluation of the vocational academy

A Survey conducted ten years after the inception of the VA showed that
the professional opportunities for VA graduates were considerably better
than those who had not received such training (Weihrich, Seidenfuss and
Goebel, 1996, p. 39). The learning-while-working approach leads to a
high degree of motivation among the participants, which in turn accounts
for the very low drop out rate of 10% from the VA (Weihrich, Seidenfuss

Although the traditional apprenticeship system is valuable for preparing
young people for a professional career; new and innovative approaches
may be required (Weihrich, Seidenfuss and Goebel, 1996, p. 39). The
VA fills an important business education gap not addressed by
universities or by traditional apprenticeship programmes for developing
specialists and managers (Weihrich, Seidenfuss and Goebel, 1996, p.
40).

This is in the light the strength of the joint commitment for planning,
operation, and control between the employer organisation and provider
can be seen. This approach forges higher level learning
outcomes that are relevant and applicable for organisations to become more effective and current. Accordingly the VA approach could be the response to the traditional German traineeship systems not meeting the requirements of the new economy.

4.5 HUMAN PERFORMANCE TECHNOLOGY MODEL

The Human Performance Technology (HPT) model uses a wide range of interventions that are sourced from many disciplines, including behavioural psychology, instructional systems design, organisational development and human resources management. HPT has been described as the ‘systematic’ and ‘systemic’ identification and removal of barriers to organisational and individual performance (HPT, Overview, p. 1).

HPT takes a systems view, and views organisations as having very complex systems that affect the performance of the individuals that work within them. A systems approach differs from a process approach in that a process contains inputs and outputs with feedback loops. A system implies an interconnected complex of functionally related components. The effectiveness of each unit depends upon how it fits into the whole, and the effectiveness of the whole depends on the way each unit functions. A systems approach considers the larger environment that impacts processes and other work. The environment includes inputs, however more importantly includes pressures, expectations, constraints and consequences (HPT, Overview, p. 1).

Du Plooy and Westraad (2003, p. 81) advocate the use of the HPT model as best practice to give attention to the elements of performance improvement implicit in the National Qualifications Framework (NQF) and related initiatives. The researcher will elaborate on the HPT model as featured in figure 4.3.
Figure 4.3: The Human Performance Technology (HPT) model.

Source: Van Tiem, Moseley and Dessinger, 2000, p. 3.
4.5.1 Performance analysis

The HPT analysis process begins with a comparison of the present and the desired levels of organisational and individual performance to identify performance gaps (HPT Overview, p. 3). A systematic assessment of the need or opportunity occurs at the beginning of a project. Needs or opportunities are about examining the current situation at the appropriate level (societal, organisational, process or work group) to identify the external and internal pressures affecting it (HPT, Overview, p. 2).

This process will determine the deficiencies or performance gaps that are to be remedied. The output is a statement describing the current state, the projected future state and the rationale or business case for action or non-action (HPT, Overview, p. 2).

The performance analysis is a compilation of an operational analysis (internal), and an environmental analysis (external). These areas together with the desired and actual state of workforce performance determines the performance gap (Van Tiem, Moseley and Dessinger, 2000, p. 3).

4.5.2 Cause analysis

Cause analysis is undertaken next to determine the work environment impact (information, resources and incentives) and people (motives, individuals’ capacity and skills) are having on performance, and why gaps in performance or expectations exist (HPT Overview, p. 3).

This step in the systematic process will determine what should be addressed to improve performance. The output is a statement of why performance is not happening, or will not happen without some intervention (HPT Overview, p. 2). The cause analysis attempts to
determine whether there is lack of environmental support, or a lack of repertory of behaviour (Van Tiem, Moseley and Dessinger, 2000, p. 3).

The output is a performance objective that describes the desired performance, de-lineates the conditions under which the performance is done, and identifies the criteria for successful performance (HPT Overview, p. 2).

4.5.3 Intervention selection and design

The design of the solution or specification of the requirement of the solution is about identifying key attributes of a solution. The output is a communication that describes the features, attributes, the elements of a solution and the resources required to actualise it (HPT Overview, p. 2). The solutions may include training and development, measurement and feedback systems, selection and compensation systems, etc (HPT Overview, p. 3).

4.5.4 Intervention implementation and change

Implementing the solution is about deploying the solution and managing the change required to sustain it. The outputs are changes in, or the adoption of, the behaviours that are believed to produce the anticipated results or benefits (HPT Overview, p. 2).

4.5.5 Evaluation

Evaluations measure the efficiency and effectiveness of what was done, how it was done, and the degree to which the solution produced the desired results so that the cost incurred and the benefits gained can be compared (HPT Overview, p. 2).
Evaluations are done after each phase of the process. Initially, a formative evaluation assesses the performance analysis, cause analysis, intervention selection and design, and intervention and change processes. The evaluation focuses on the immediate response of employees and their ability and willingness to perform the desired behaviours. The final evaluations are centered on improvement of business outcomes as well as determining Return On Investment (ROI) for the intervention (HPT Overview, p. 3).

4.5.6 Appraisal of the human performance technology model

The following areas should be integrated into any VET model:

- the consideration and impact of the broader systems on effective organisational and individual performance outcomes,
- the emphasis on major and systematic up-front analysis determining organisational and individual performance needs, together with an intensive cause analysis,
- intervention selection and design impact across broader systems,
- using intervention implementation to effect organisational and individual change, and
- emphasis on evaluation, not only formative and summative, but also ROI for the project.

4.6 THE PRESENTATION OF A PROCESS MODEL FOR EFFECTIVE LEARNERSHIP IMPLEMENTATION

This section will outline the various phases of the learnership process model as reflected diagrammatically in figure 4.4 for the effective implementation of learnerships.
The model proposed has 6 main phases that occur within the organisation, which interact with the ‘organisational management system’. The organisational management system acts as an intermediary for the managing and liaison of the learnership internally, and with stakeholders in the environment external to it. The process model functions within this scheme in relation to its particular ‘organisational context’ and applicable ‘range of industry’.

The phrase ‘range of industry’ refers to the particular sub-sector or chamber within which the organisation finds itself. The chambers that form part of this research study are the Automobile, and New Tyre chambers. These chambers relate to the Manufacturing Engineering and Related Services Education Training Authority (MERSETA), which services the chambers, in relation to the broader ‘manufacturing, engineering, and technology’ economic sector (Nel, Gerber, van Dyk, Haasbroek, Schultz, Sono, and Werner, 2001, p. 452).

The learnership process model should be interpreted as a sequential process model, with a recommended sequence of phases for consideration. If a learnership has been implemented previously, some of the phases may not be necessary, however, all phases and actions should be considered. Table 4.3 lists the actions that are required for the applicable phases in the learnership process model.
Figure 4.4  A process model for effective learnership implementation.
### Conduct Organisational Skills Planning (Phase 1)
- Perform organisational skills analysis
- Integrate learnership into organisational Human Resources Development Strategy

### Establish Learnership (Phase 2)
- Confirm demand for a learnership
- Generate unit standards and qualification for learnership

### Select and Design Learnership (Phase 3)
- Select an appropriate learnership programme to meet organisational goals
- Develop organisational workplace project proposal before implementation
- Design a learning programme outlining all learning requirements

### Prepare to Implement Learnership (Phase 4)
- Establish a process and project steering committee to guide implementation
- Form implementation partnerships with providers
- Develop an organisational capacity for delivery of the learnership
- Obtain workplace provider accreditation
- Select and support learners
- Develop learning material from the detailed curriculum

### Implement learnership (Phase 5)
- Implement workplace learning
- Conduct formative and summative assessment

### Monitor, Report and Evaluate (Phase 6)
- Prepare reports for organisation and SETA
- Determine the cost effectiveness and impact of the learnership
- Update organisational Quality Management System based on improvements identified

Table 4.3: Actions to be considered in the learnership process model phases.
4.6.1 Conduct organisational skills planning

Bellis and Hattingh (2003, p. 1) explain that planning for skills development must be aimed at improving individual and organisational performance.

➢ Perform organisational skills analysis

Hattingh (2003c, p. 2) declares that the organisations that will benefit most from the Skills Development Legislation will be those who successfully integrate skills planning and learnerships into their strategic business processes. Learnerships should be used as a tool to build the competence required to meet current and projected business goals (Hattingh, 2003b, p. 2).

Bellis (2002, p. 8) proposes five phases, across twelve steps, to aid the skills planning process:

Phase 1: Establish or confirm the goals of the skills planning strategy,
Phase 2: Identify and analyse the skill needs,
Phase 3: Design or select the skills development solution,
Phase 4: Plan implementation, and
Phase 5: Plan evaluation.

Bellis (2002, p. 8.) mentions a few crucial comments regarding the skills planning process. The process is not separate from the normal Human Resource Development (HRD) or training and development processes. Performing the skills development process is not about filling in forms, rather it is about thinking - in the long term and short term, creatively and imaginatively, critically and with empathy - about the processes and the quality and performance that needs to be developed. It is about taking
decisions for planning the achievement of real change and growth. The
twelve-step process to perform organisational skills planning is as
follows:

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Establish or confirm the goals of the skills planning strategy</td>
</tr>
<tr>
<td>2</td>
<td>Establish or confirm the organisational process for skills planning</td>
</tr>
<tr>
<td>3</td>
<td>Constitute the skills planning structure (team, committee)</td>
</tr>
<tr>
<td>4</td>
<td>Identify and analyse skills needs</td>
</tr>
<tr>
<td>5</td>
<td>Describe solutions to skills gaps and opportunities</td>
</tr>
<tr>
<td>6</td>
<td>Design or select skills development solutions</td>
</tr>
<tr>
<td>7</td>
<td>Prepare workplace skills plan</td>
</tr>
<tr>
<td>8</td>
<td>Implement the skills plan</td>
</tr>
<tr>
<td>9</td>
<td>Monitor the implementation</td>
</tr>
<tr>
<td>10</td>
<td>Reporting, record and report on skills development</td>
</tr>
<tr>
<td>11</td>
<td>Plan evaluation, monitor the implementation</td>
</tr>
<tr>
<td>12</td>
<td>Plan improvements, revise and recommend on skills planning process</td>
</tr>
</tbody>
</table>

Table 4.4: The process of planning for the development of skills (12 steps).

Source: Adapted from Bellis, 2002, p. 8.
Integrate learnership into organisational Human Resources Development Strategy

Learnerships are a key feature of the skills planning process and must be catered for when planning strategic skills development requirements (Strong, 2000c, p. 18). Skills planning must be derived from the organisational business plan and integrated into its overall HRD Strategy (Bellis, 2002, p. 10).

Through the skills planning process, it may be established that there is definitely a lack of skill to perform to standard. This means that the individual or group of individuals, could not perform even if they wanted to; then training may be the solution. Bellis (2002, p. 48) suggests further critical questions that need to be asked?

Question 1: Would the set of skills need to be packaged as a ‘skill programme’?,
Question 2: Would the range of this training need to be appropriately addressed through a learnership?,
Question 3: Are the structures, the people and time resources available to develop and manage a learnership for the group of people?, and
Question 4: Is the learnership existing and registered with the SETA and available to learners and employers?

Negative answers to critical questions 1 and 2 could indicate an organisational need for a skills programme or learnership. Lack of systems and resources in question 3 may indicate inadequate organisational preparation. If the answer to Bellis’ last question (question 4) is no, then the learnership would have to be established first.
The broad term establishment refers to the qualification and unit standards being registered with SAQA. The need for the learnership is confirmed by the SETA, and registered with that SETA and the Department of Labour (de Jager, Hattingh and Hüster, 2002, p. 6). The broad processes required for the learnership establishment will be clarified by de Jager, Hattingh and Hüster (2002) in the next subsection.

4.6.2 Establish learnership

The steps outlined in figure 4.5 need to be considered when establishing or developing a learnership. The steps and activities do not necessarily reflect a sequence, but only aspects to be considered. The process of establishing a learnership starts with an objective that should be formulated for its establishment (de Jager, 2001, p. 3).

➢ Confirm demand for a learnership

Learnerships must be demand led; this means they should be offered in response to a demonstrable social or economic need. These needs are more broadly based than the formal economic sector (Learnership working group, 1999, p 7).

When confirming a demand led learnership, the objective should be phrased as though it has already been achieved e.g. (de Jager, 2001, p. 3):

“A demand led learnerships has been developed and registered and all systems necessary for implementation are in place”.
The results or high level outputs required to ensure that a demand led learnership can be delivered include the following (de Jager, 2001, p. 3):

**Delivery 1:** The need for the learnership is quantified, localised, documented and accepted by the SETA,

**Delivery 2:** The process of development and preparation for implementation is well planned, managed and documented,
Delivery 3: The learnership is designed and registered,
Delivery 4: The SETA has the capacity and systems to provide guidance regarding requirements for registration and delivery,
Delivery 5: The workplace provider meets the requirements and has the capacity to provide the appropriate training in the work environment,
Delivery 6: The training provider (institutional) meets all the requirements and has the capacity to provide the education and training required, and
Delivery 7: Co-operation between the workplace provider and institutional training provider ensured.

The title of this subsection ‘establish learnership’ in terms of the ‘process model for effective learnership implementation’ are directed at delivery points 1 to 4 of de Jager (2001, p. 3) model. Delivery points 5 to 7 of de Jager’s model will be expanded in subsequent segments of the ‘learnership process model’.

- Generate unit standards and qualification for learnership

The researcher’s intent in this segment is to ensure that the appropriate qualifications and unit standards are available. If there were a lack of qualifications and unit standards the SETA would recommend that the qualification be appropriated by the National Standards Body (NSB), in order for the requisite qualifications and unit standards to be generated. A Standards Generation Body (SGB) would be established to generate the qualifications and unit standards (Mercorio and Mercorio, 2001, p. 94). Unit standards form the basis of qualifications and will form the content of learnerships (Strong and Vorwerk, 2001f, p. 19).
The generated qualifications and unit standards would be recommended to the NSB for approval and registered on the NQF (Bellis, 2000, p. 80). Hallendorf (2002, p. 8) makes mention of a Sector Qualifications Framework (SQF) that should be established to present the range of qualifications needed in a particular sector to meet the recognition needs in various areas, and levels for that sector. All planning, preparation and infrastructure needs to be provided for when proposing a learnership (Strong, 2000b, p. 8):

- identify providers,
- funding available,
- identify partners,
- learnerships need to reflect skill shortages, and
- all development work regarding national standards and qualifications needs to be complete.

Hattingh, Theron and Bellis (2002c, p. 7) present two vital aspects for the establishment and success of learnerships. The first is that key participants must be involved at an early stage of the project to establish ownership, accountability and ensure continuity. The second relates to having an effective functioning SETA that take decisions timeously, creates appropriate lines of reporting, and provides the administrative support, financial support, emotional support and commitment, which are all essential for project progress (Hattingh, Theron and Bellis, 2002a, p. 14).

4.6.3 Select and design learnership

Hattingh, Theron and Bellis (2002d, p. 2) outline that learnerships provide a unique type of learning that requires fundamentally different approaches to the structuring of a set of learning experiences and achieving outcomes. A divergent view is to reshape existing models,
such as apprenticeships and re-cast them into a mould that looks very much like learnerships. The benefit is that it speeds up the learnership development processes. The down side however, is that a ‘customised, unique, work-related’ product preferred way of learning for a specific learner target group, within a current legal framework, and acknowledging the role of formal academic institutions are lost.

➢ Select an appropriate learnership programme to meet organisational goals

When a learnership is chosen, it must be the most appropriate route to a qualification. Learners who already have extensive practical experience, but do not have the qualification that reflects their expertise, do not need to go through the costly and time consuming learning process required in a learnership and should consider alternative routes. Inexperienced learners who lack both the theoretical as well as the practical application would make the best candidates (Hattingh, 2003c, p. 3).

The researcher notes that once the learnership has been selected, and an appropriate qualifications identified the learnership must be designed and contextualised to meet the specific organisational operational context.

➢ Develop an organisational workplace project proposal before implementation

Addis (2003, p. 1) advocates a ‘Project Based Approach’ (PBA) to integrate learning and assessment for learnership and skills programme implementation. The PBA uses identified ‘workplace specific projects’, which have clearly defined objectives and outputs that are related to the learner and the business. Projects allow for continuous measurement of the business effectiveness objectives (i.e. productivity, quality), as well
as to ensure that the learner is not only competent, but also effective in terms of performance.

Meyer, Opperman and Dyrbye (2003, p. 4) agree and argue for the inclusion of business effectiveness measures, such as the ROI analysis, to provide estimated returns from completed learnerships. Swanson and Holton (1999, p. 4) stress that assessment of performance results are a core organisational process, and HRD must be held accountable for obtaining the performance results through its interventions.

de Jager and Hüster (2003, p. 7) share a similar view of Addis’s PBA and place emphasis on the development of ‘an action orientated curriculum’. An action-orientated learning approach structures learning opportunities in such a way that the learner is enabled to act increasingly independently. After an extensive development process it culminates in the development of an organisational learning programme.

Addis (2003, p. 2) sketches the PBA development process as starting with the identification of the various inputs that will firstly assist in understanding the projects, and secondly will enable the projects to be formulated.

As a guide, the following inputs would normally apply, but the list can be increased to include other appropriate inputs (Addis, 2003, p. 2):

- life world of the learner,
- qualification details,
- exit level outcomes,
- unit standards (in terms of a content analysis),
- current business practices in terms of; core values, Quality Management Systems (QMS), current trading conditions, processes and problems, skills development planning, performance appraisals, and special projects,
• middle management inputs in terms of organisational culture, production and quality requirements, and
• inputs from labour.

The characteristics of the PBA are (Addis, 2003, p. 3):

• projects describe the current business situation with projects designed to incorporate approximately 70% of learning exclusively workplace based,
• projects are workplace specific, which means that the learning is contextualised,
• the overall scope of projects includes the development, planning and implementation of business related solutions,
• projects achieve integrated learning by means of clustering unit standards or parts thereof (specific outcomes),
• projects measure applied competence as per NQF regulations,
• formative assessment is ascertained during and at the completion of each unit standard included in a project,
• integrated summative assessment is set at stages during the project and at the end of a project,
• on average there are 3 workplace projects per qualification, and
• specific projects can be designed at set up to assess Recognition of Prior Learning (RPL).

The first important aspects of the project outputs are that they must be measurable not only at the end of a project, but also while it is running. The second important aspect of project outputs is that the measurements must result in tangible evidence. Addis (2003, p. 4) advocates 5 steps for the development of learner and business indicators:

Step 1: Establish baseline indicators,
Step 2: Decide the measurement intervals during the PBA,
Step 3: Ensure that the measurements are taken,
Step 4: Set up feedback processes for parties concerned to review the findings, and take appropriate action if major variances occur, and
Step 5: Compare terminal indicators to baseline indicators.

The approach is represented diagrammatically in figure 4.6. All project information and details are described in a ‘project document’ for project approval prior to implementation.

Figure 4.6: Project Based Approach (PBA) integrating learning and assessment for learnership and skills programme implementation.


➢ Design a learning programme outlining all learning requirements

Compiling the workplace learning programme next entails a detailed analysis of the unit standards where all aspects of the unit standards are identified, contextualised and formulated into a learning sequence. Cognisance of the interrelatedness of the unit standards must be taken
into account. The following must also be included in the sequence of learning (Addis, 2003, p. 7):

- the estimated learning time,
- the starting date of the section of learning,
- the estimated completion date for the section of learning, and
- the details and location of the learning.

A timeline can now be drawn up which clearly indicates the weekly learning activities. By careful monitoring a learners progress can be ascertained, and remedial steps taken should there be a project timing variance (Addis, 2003, p. 8). Looking at ways of integrating structured learning and workplace learning will help determine how the process is going to be approached and how the learning process will be designed (Strong and Vorwerk, 2001d, p. 10).

4.6.4 Prepare to implement learnership

de Jager, Hattingh and Hüster (2002, p. 7) propose 9 phases for the implementation of learnerships across most sectors and organisations. What follows are actions recommended for consideration in learnership implementation derived from the lessons learned using the de Jager, Hattingh and Hüster's (2002) 9 phase model; together with information and documentation from Shane Duncan (personal communication: Solutions Manager: People Inc. Masikhulisane, Human Resources and Performance Improvement Consultants based in Port Elizabeth 9 December 2003).
Establish a process and project steering committee to guide implementation

Establish the process for delivery by setting up a Learnership Implementation Steering Committee (LISC) that will guide the process and make critical decisions. Develop a QMS that will provide a framework to guide quality during the process, together with authorising a business plan and budget. A project manager must be appointed to keep the process in motion within the company. The project team must schedule regular meetings during the process to aid the dissemination of information to all role-players (Duncan, 2004, p. 1).

Form implementation partnerships with providers

A workshop must be conducted with employers and providers to develop a curriculum framework, learning programme, learning methodology and activity distribution. Forge partnerships with leading providers that will add value to the learnership process (Duncan, 2004, p. 1).

de Jager and Hüster (2003, p. 8) elaborate that a curriculum framework is to provide guidance to learners, providers, workplaces, material developers, and quality assurors:

- what must be learned (content),
- how it should be learnt, and
- how it can be assessed.

Develop organisational capacity for delivery of the learnership

Employers and providers must also discuss and prepare for accreditation. An Implementation Task Team (ITT) must be set up at the workplace with the institutional provider to establish a learning
partnership. Develop organisational capacity for delivery by identifying, training and registering assessors. Provide training to prepare workplace trainers and mentors (facilitators). Develop roles responsibilities for workplace facilitators and assessors. Identify and source staff required for administration, including any additional equipment and/or resources necessary for delivery. The targeted learners and existing workforce would need orientation regarding the learning delivery (Duncan, 2004, p. 2).

➢ Obtain workplace provider accreditation

SETA’s play a pivotal role with regard to QMS; however, the expectation is that companies would each develop a system that is unique and beneficial to them. The aim of the QMS will be to add value to the process of learning and skill development, and that this in turn will have positive implications for South Africa (Strong, 2000d, p. 2).

Companies should obtain provider accreditation by developing a vision, mission and policy statement for the training function. Clear policies, procedures, and work instructions must be drafted in accordance with relevant Education and Training Quality Assurance (ETQA) body requirements. Accreditation requirements are to be identified with actions before an application for accreditation is made (Duncan, 2004, p. 2).

➢ Select and support learners

Develop internal learner selection policies, procedures and processes; and advertise. Develop similar selection policies, procedures and processes for unemployed learners. Identify and select learning candidates using the guidelines developed. Select and prepare learners for pre-screening/assessment activities (Duncan, 2004, p. 3). Coetzee and Stone (2004, p. 8) concur and state that appointed learners must be
subjected to orientation on an organisational, and learnership programme level. de Jager, Hattingh and Hüster (2002, p. 5) emphasise that a success factor of learnership implementation is selecting the ‘right’ learner for the ‘right’ learnership level.

Hattingh (2002e, p. 25) provides 6 phases for the recruitment and selection of learners for learnerships. Hattingh shares that organisations should not set up elaborate systems for recruitment and selection. Keep the process simple and utilise processes that currently exist for other learning programme, as learnerships are simply a different route to achieving learning outcomes.

Learners finally selected are to sign learnership agreements and contracts of employment, if learners are unemployed. Learners are given credit for RPL against the qualification. An individual learning programme against the broad curriculum and learning programme, together with an individual rotational plan between providers, is developed for each learner. Learners are provided with orientation as to (Duncan, 2004, p. 3):

- roles and responsibilities,
- learning methodology,
- learning approach,
- curriculum learning programme,
- rotation plan,
- formative assessment,
- summative assessment,
- assessment appeal procedures, and
- support structures.

Secularly, people are mostly assessed in the context of a group or team. This means that learning methodologies which use teams prepare a
person for the kind of environment in which new skills and knowledge will be applied (Strong and Vorwerk, 2001a, p. 9).

➢ Develop learning material from the detailed curriculum

Outcomes-based education and training has also shifted the standards away from the course or textbook. The unit standards and the qualification are now separate from the medium of instruction. This allows more flexibility in the planning of a learning pathway to achieve the desired outcomes. The pathway can be customised to that of the learner. Choices are based on effectiveness and learner needs (Strong and Vorwerk, 2001c, p. 5).

Development of learning material against the detailed curriculum framework and learning programme is prepared. The curriculum framework and learning programme are sufficient to guide learning material developers to evaluate, adapt and/or develop new integrated learning material and resources that will address the outcomes-based action orientated approach (de Jager and Hüster, 2003, p. 24).

Westraad (2003, p. 9) recommends 7 action steps that may be used to develop high-quality, authentic and relevant learning material.

Action step 1: Select a relevant qualification or unit standard,
Action step 2: Analyse the qualification or unit standard,
Action step 3: Ensure that the SAQA critical cross-field outcomes are incorporated and developed,
Action step 4: Develop a profile of the learners,
Action step 5: Select a delivery mode that accommodates both the formal and work-based learning components,
Action step 6: Design learning and assessment opportunities, and
Action step 7: Pilot and refine.
de Jager (2002, p. 18) and Coetzee (2004b, p. 3) underscore the importance of an integrated learning programme that is developed in an Outcomes Based Education and Training (OBET) format. The format needs to be resource-rich utilising a multiplicity of learning resources such as computers, Compact Discs (CDs), videos, text books, and targeted learning modules must be identified for the learning programme, and be incorporated into the facilitation process. The advent of e-learning can aid this connection of people development with technology in the practice of developing human resources (Cronje and Vorster, 2004, p. 1).

The ‘prepare to implement learnership’ component is a large phase crucial for the successful implementation of the learnership process model. The following table is a summary of the project tasks necessary for the process models effective implementation. These project tasks are a summary from the literature review in the above sub-section and illustrated in table 4.5 for efficient management of the process.

*Prepare to Implement Learnership (phase 4)*

- Establish a process and project steering committee to guide implementation
  - Establish a learnership management team
  - Develop a quality management system including business plan and budget
  - Appoint a project manager to drive the process
  - Schedule regular meetings to ensure communication
Form implementation partnerships with providers
- Conduct a workshop with employers and providers to develop a broad curriculum and learning programme
- Select and form partnerships with leading providers
- Decide on learning activity distribution

Develop organisational capacity for delivery of the learnership
- Conduct a workshop with employer and providers to prepare for accreditation
- Set up an implementation team at workplace and provider
- Identify, train and register assessors
- Provide training to workplace trainers and mentor (facilitators)
- Identify staff required for administration
- Identify and obtain any additional equipment and/or other physical resources needed
- Orientate existing workforce

Obtain workplace provider accreditation
- Develop a vision and mission statement regarding the training function
- Obtain and complete an accreditation application form
- Develop and document clear policies and/or procedures in accordance with ETQA requirements

Select and support learners
- Develop learner selection policy, procedures and processes
- Identify, select and prepare learners
- RPL learners
- Develop individual learning programmes
- Plan rotation between institutional and workplace learning for each learner
- Orientate learners
- Sign learnership agreements
Table 4.5: Project task summary for the ‘prepare to implement learnership’ phase.

4.6.5 Implement learnership

Coaching and mentoring are based on natural skills that all people possess and can be further nurtured and developed to support learning processes (Strong and Vorwerk, 2001b, p. 20). Sound coaching creates the link between structured learning and workplace experience (Strong and Vorwerk, 2001b, p. 3).

Duncan (2004, p. 2) points out that workplace mentors are critical to the success of any workplace learning. The mentors manage the learners during workplace training, convey knowledge of organisational routines and managerial systems, and identify opportunities for learning. The mentor’s primary focus is developing the learner comprehensively by using day-to-day working experiences. Jacklin (2003, p. 3) confirms this aspect and stresses the need to have trained persons in place prior to embarking on learnership implementation.

Implement workplace learning

Learning is implemented by mentors being assigned to a learner who manages their overall development, formative assessments and release to the next project or area of learning. Mentors compile a Learning Programme (LP) that describe when and where the learners will receive learning against the unit standards, relative to their particular project. The LP is scheduled to develop a learning plan (Duncan, 2004, p. 3).
The actual ‘learnership qualification training’ starts with the mentor issuing the learners with Learning Guides (LG) and Work Books (WB). The LG provide theoretical context for the learning, while the WB governs the self-assessments, theoretical tests and practical workplace based assignments. The learner completes 30 per cent of the learning in an off-the-job environment i.e. 20 per cent as homework off site, and 10 per cent in an off-the-job environment at work (classroom). The balance, 70 per cent, is provided practically with on-the-job demonstrations and practical application of the learning in the workplace (Duncan, 2004, p. 3).

de Jager (2002, p. 15) argues for credits ratios (i.e. notional hours) to be apportioned as follows: one third institutional learning, one third practical on-the-job learning, and one third self study time; for structured workplace learning versus structured institutional learning. de Jager (2002, p. 15), however debates further that implementation of the above credit ratios proved problematic. A complicating matter is that the notional hours are time-based, and contradict outcomes based learning; as competence can be achieved in a much shorter time than learning determined by a calendar-based schedule.

➢ Conduct formative and summative assessment

Assessment involves learners in the workplace demonstrating their competence by meeting all the requirements of a unit standard before they receive the credit for that standard. Learners need to show assessors evidence of their competence (Strong and Vorwerk, 2001e, p. 2).

Mentors conduct formative assessments of learning outcomes on a continuous basis as learner’s complete assignments, self-assessments and tests. The mentor ensures that learners compile a Portfolio of
Evidence (PoE) using these signed off documents. On completion of all aspects of learning in a particular project, the mentor ensures that the learner is transferred to the next project, and appropriate communication regarding the transfer is made (Duncan, 2004, p. 3).

A qualified assessor uses the formative assessment records as evidence for the summative assessment conducted at the end of the learning programme. Summative assessments are designed to ensure that the learner has fulfilled all of the competency requirements of the programme (Kenwright and Hattingh, 2003, p. 20).

The assessor will advise the mentor where a learner has not completed, or adequately met the requirements of the projects. The mentor will advise the learner in this regard and will be required to implement the agreed remedial or corrective action within set time-frames. On completion of all of the projects, the learner's PoE is submitted to the assessor who assesses the evidence against set criteria and makes a decision of ‘Not Yet Competent’ (NYC) or ‘Competent’ (C), and provides the employee with feedback (Duncan, 2004, p. 5).

Hattingh (2003a, p. 16) declares that there must be separate and joint summative and integrative assessment to assess workplace and institutional learning. Figure 4.7 outlines the learnership qualification training process.
Figure 4.7: Learnership qualification training process for the Project Based Approach (PBA).

The assessor forwards the completed portfolios to MERSETA for moderation. MERSETA is responsible for the issue of certificates to learners via the Skills Development Facilitator (SDF). The SDF plays a significant role between all stakeholders as can be seen in figure 4.7 (Duncan, 2004, p. 5).

The mentor and learner also review the LP. Deviations and improvements are noted, and appropriate remedial/corrective action is recommended to effect future learning programme design changes (Duncan, 2004, p. 5). The success of learning within an organisation depends on the effective management of the learning process. The process includes the selection of learners, learning materials, learning providers and resources (Strong and Vorwerk, 2001g, p. 2).

4.6.6 Monitor, report and evaluate

The evaluation team should ideally perform its motoring and evaluation function throughout implementation. This will allow the team to make recommendations throughout the implementation process, as opposed to an after-the-fact report of what when wrong (Hattingh, 2003a, p. 20).

➢ Prepare reports for organisation and SETA

Monitoring and reporting takes the form of reports on progress against the individual learning plan. The mentors complete internal reports for company consumption, and external reports for MERSETA. The weekly reports detailing learner progress on the project plan are summarised for review by the SDF, LISC, and Employee Development Committee (EDC). Appropriate corrective action is implemented and tracked to resolve any identified concerns (Duncan, 2004, p. 4).
Determine the cost effectiveness and impact of the learnership

Evaluation is done after each phase of the process: perform organisational skills planning, establish learnership, select and design learnership, prepare to implement learnership, and implement learnership. The lessons learned would be fed back and appropriate amendments made. Updates to all organisational policy and procedures are actioned together with feedback to all stakeholders (Duncan, 2004, p. 7).

de Jager, Hattingh and Hüster (2002, p. 18) stipulate that the purpose of the evaluation is to determine the cost effectiveness and impact of the learnership and to make recommendations for future implementations. As summative evaluation centres on the improvement of business outcomes, the actual business indicators measured would provide data to determine a ROI for the project (Addis, 2003, p. 4). The value of a cost-benefits analysis to analyse the impact of training on the organisation allows a company to demonstrate the value gained from the skills development initiative (SDPU, 2002, p. 14).

The learnership working group (1999, p. 58) cite additional areas that should be evaluated to assess the effectiveness of learnerships. The areas are:

- Whether or not productivity levels have been increased in the industry,
- Whether or not levels of employment and employability have increased, and
- Whether or not higher levels of innovations are being achieved in industry.
Update organisational Quality Management System based on improvements identified

A QMS links and organises all the components of the learning and skills development system; deals with the quality of the learning processes and the relationship between them and their products or outcomes (Strong and Vorwerk, 2001, p. 3).

de Jager, Hattingh and Hüster (2002, p. 18) confirm that policies and procedures together with other aspects of the QMS are reviewed and updated where required, and in accordance with Education Training and Quality Assurance (ETQA) body requirements.

The LISC is responsible for the review of the evaluation aspects for future project decisions with communications regarding the project successes disseminated to both Line Management and other stakeholders (Duncan, 2004, p. 7).

Re-implementation of the same learnership in the same implementation environment, using mainly the same training institutions and employers, would require some adaptation geared towards more effective implementation. Re-implementation of a learnership in a completely different environment would require more substantial adaptation to accommodate the differences (Hattingh, 2003a, p. 20).

4.6.7 Organisational management system

The ‘organisational management system’ acts as the intermediary or connection between the organisational processes and organisational systems, and the environment external to it. The role of this sub-system is to ensure that the necessary project objectives and sub-objectives are managed and accomplished from the internal, and/or external
stakeholders and role-players. What follows is a narration of the critical system enabler, and important stakeholders and role-players liaison.

A major enabler to ensure a successful learnership is a sound quality assurance framework. Quality assurance mechanisms and accreditation for education and training providers (includes: external training providers; and internal in-house, company training departments) are not undertaken to satisfy South African Qualifications Authority (SAQA), the Sector Education and Training Authority (SETA), or Education Training Quality Assurance (ETQA) body. The main driving force towards quality in education and training provision are from the clients and learners who are paying for the education and training services. Quality comes from within the organisation as it works towards making legal requirements a living part of day-to-day work. Quality should be part of everyone's job description, and part of the organisational culture (Hattingh, 2003d, p. 2). SAQA (2001, p. 5) corroborate this and detail that they will not prescribing a QMS for ETQAs and providers.

The Education Training and Development Practices Sector Education and Training Authority (ETDP SETA) similarly argue that quality assurance are all planned activities within a QMS to assure that everyone involved in the education and training process maintain quality. Within learnerships the providers of the structured theoretical learning component (external provider), as well as the workplace provider of the structured workplace experience and learning (internal provider) must be accredited with the relevant SETA, ETQA (ETDP, 2002, p. 18).

The researcher observes that an organisational QMS is used as a basis to assure quality of learning, and as a baseline for ‘continuous improvement opportunities’ that can be applied to the system.
SAQA registers and controls unit standards and qualifications. The development of unit standards and qualifications usually entail working within SAQA structures, NSB and SGB’s depending on the state of existing qualifications (ETDP, 2002, p. 24). The SETA, within which the learnership falls, leads with support in the development and implementation of all sector co-ordinated learnerships (ETDP, 2002, p. 26). The SETA’s will interact with organisations on a number of topics. They range from skill development, accreditation and external moderation of work based assessment, to the promotion and registration of learnership contracts (Mercorio and Mercorio, 2001, p. 5).

The Department of Labour (DoL) develops the regulations that govern the registration of learnerships. The DoL evaluates and registers learnerships, and have the legal authority to develop either regulations or guidelines in respect thereof (Skills Development Regulations Guidelines, 2003, p. 1).

The South African Revenue Service (SARS) is responsible for the collection of monthly levy payments from organisations and paid to the identified SETA. The SETA then disperses grants to the organisation on a monthly basis if applying requirements are met. When following up on the lack of grant disbursements, the SDF may have to liaise with SARS to remedy problems regarding administration (personal communication: Shane Duncan, Solutions Manager: People Inc. Masikhulisane, Human Resources and Performance Management Consultants based in Port Elizabeth, 10 July 2003).

As learnerships are about staff training, unions play an important role, both in the conceptualisation of programmes, their implementation and monitoring. Learners work for the employer, participate in on-the-job training organised by the employer, and learn through a provider.
Learners on learnerships are employees and are entitled to be union members (ETDP, 2002, p. 24).

Employers employ the learners and ensure that while they are working they are also learning about the job. They must ensure that all on-the-job learning is integrated with structured learning. They play a role in assessing learners and it is their responsibility to identify and train workplace assessors and mentors. The employer/provider is subject to the same rules and regulations pertaining to provider QMS. The employer’s and provider’s roles and responsibilities must be clearly defined, understood and documented in the learnership agreement (Warrin, 2003, p. 25).

Effective communication is critical to the success of any multi-faceted long-term project involving stakeholders and participants spread over a large geographical area.

Communication throughout the project should be geared towards achieving specific objectives at different stages of the project (Hattingh, Theron and Bellis, 2002b, p. 16):

- **before commencement**: to inform interested parties, obtain buy-in, gain commitment and clarify roles, responsibilities and accountabilities of all stakeholders and participants,
- **during the project**: to keep stakeholder informed of main developments, obtain feedback, guide decision making, address obstacles, delays, funding, and other assistance required to ensure progress, and
- **at the end of the project**: to communicate outcomes of the project, guide stakeholders on how to implement the processes and products through providing guidelines and implementation manuals.
The researcher concludes that the above enablers to successful learnership implementation are by no means comprehensive. The SDF would predominately lead the system enablers, and the management and liaison with the various stakeholders and role-players within the dynamic ‘organisational management system’.

4.6.8 Organisational context and range

All Education Training and Development (E T and D) endeavours give rise to two kinds of models. The actual practice of the pilot implementation endeavors; and the dynamics and key characteristics of the process, of which the pilot is but an example in practice (Du Plooy and Westraad, 2003, p. 234).

In terms of replicability, it is useful to aim at replicating the outcome, rather than replicating the practice. A process model describes what to consider in developing a unique practice within a unique context and range (Du Plooy and Westraad, 2003, p. 234). Context refers to organisational size, resources of people, finance, premises, capacity and commitment to implement, while range refers to one of the applicable 25 economic sectors of industry (Du Plooy and Westraad, 2003, p. 257). Hattingh agrees and states that organisations must identify the action steps relevant to their own situations as there is no ‘one size fit all’ model (2003a, p. 1).

Therefore, in order to obtain successful replication of an outcome, it is necessary to develop unique appropriate means, guided by the process model indicating values; and with examples of previous practice to guide implementation. The model must show not only the various components of the system, but also allow for the consideration of widely differing contexts and a range of industries.
4.7 CONCLUSION

This Chapter has framed the various theoretical models that have influenced the learnership process model. Based on a review of the models discussed the researcher notes that the ‘process model for effective learnership implementation’ provides a systemic model that incorporates key actions for consideration when implementing learnerships.

As learnerships are essentially an application of change management processes, the success of learnerships in an organisation is based on the organisational ability to change their current culture to one of being an active and ongoing ‘learning and performance culture’. To impact this culture currently, a ‘critical mass’ of learners needs to be skilled to affect permanent changes in applying the new and improved work behaviours.

The following Chapter will outline and provide the basis for an empirical study, which will elaborate on the research methodology used during this research project.
CHAPTER 5

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CHAPTER 5

RESEARCH METHODOLOGY

5.1 INTRODUCTION

In Chapter two the aspects of workplace learning were discussed, with the features of learnerships reviewed in Chapter three. Chapter four focused on the development of an organisational learnership model, which was used as a basis for this research study.

The purpose of this Chapter is to describe the research methodology used during this study. This Chapter will elaborate on the research methods and sample, together with the construction of the survey questionnaire.

5.2 RESEARCH PARADIGMS AND METHODOLOGY

Mouton (2001, p. 56) and Hussey and Hussey (1997, p. 54) clarify the term research methodology, and state that it refers to the overall approach to the research process. Vogt (1993, p. 196) as quoted in Hussey and Hussey (1997, p. 114) adds that research design refers to the science (and art) of planning procedures for conducting studies to obtain the most valid findings.

The term research design denotes a detailed plan that will guide and focus the research. The research paradigms used in a study may be more qualitative, or quantitative in nature. The research paradigms selected, thus have important implications for the choice of methodology, and hence methods for collecting data (Collis and Hussey, 2003, p. 113).
The paradigms adopted are represented in a continuum in figure 5.1. The continuum shows the main features of the two paradigms (Hussey and Hussey, 1997, p. 54).

<table>
<thead>
<tr>
<th>Positivist paradigm</th>
<th>Phenomenological paradigm</th>
</tr>
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<tbody>
<tr>
<td>Tends to produce quantitative data</td>
<td>Tends to produce qualitative data</td>
</tr>
<tr>
<td>Uses large samples</td>
<td>Uses small samples</td>
</tr>
<tr>
<td>Concerned with hypothesis testing</td>
<td>Concerned with generating theories</td>
</tr>
<tr>
<td>Data is highly specific and precise</td>
<td>Data rich and subjective</td>
</tr>
<tr>
<td>The location is artificial</td>
<td>The location is natural</td>
</tr>
<tr>
<td>Reliability is high</td>
<td>Reliability is low</td>
</tr>
<tr>
<td>Validity is low</td>
<td>Validity is high</td>
</tr>
<tr>
<td>Generalises from sample to population</td>
<td>Generalises from one setting to another</td>
</tr>
</tbody>
</table>

Figure 5.1: Features of the two main paradigms.

Source: Hussey and Hussey, 1997, p. 54.

Collis and Hussey (2003, p. 77) and Leedy (1993, p. 143) debate that there is difficulty in mixing the two main paradigms in the same study as they represent two extremes of the continuum. It is, however, perfectly possible and advantageous to use qualitative and quantitative methods for collecting data, and reconciling these two paradigms. A questionnaire survey providing quantitative data could be accompanied with in-depth interviews to provide qualitative insights.

The use of different research approaches, methods and techniques in the same study is known as triangulation and can overcome the potential bias and sterility of a single method approach. A type of triangulation known as methodological triangulation is one of four types of triangulation. Methodological triangulation uses both quantitative
together with qualitative methods for data collection (Leedy, 1993, p. 143).

Hussey and Hussey (1997, p. 75) quote Jick (1979) who contends that triangulation has vital strengths, and encourages productive research. However, replication is exceedingly difficult to perform due to type mixed quantitative and qualitative method approach.

The research paradigm adopted in this study was phenomenological, as the study was close to the research situation, with a high degree of validity. As this paradigm is not strong on reliability and could change from one setting to another, methodological triangulation was used to solve the main problem and sub-problems. The main problem and sub-problems were:

MAIN PROBLEM

How successful are the methods used by organisations within the Manufacturing Engineering and Related Services Education and Training Authorities (MERSETA) chambers to develop, implement and maintain learnerships?

SUB-PROBLEM ONE

What methods are required for organisations to develop, implement and maintain learnerships that are revealed in literature?

SUB-PROBLEM TWO

What methods are organisations within the MERSETA chambers utilising to develop, implement and maintain learnerships?
SUB-PROBLEM THREE

To what extent do the methods used by organisations within the MERSETA chambers differ from those suggested in the literature?

The following broad procedures were adopted to solve the main and sub-problems. Chapter two conducted a literature examination to determine the aspects of workplace learning. Chapter three considered and reviewed critical features of learnerships. Extensive international experience was considered and discussed. This resulted in the solving of sub-problem one and two.

Chapter four reviewed international vocational models and South African learnership literature to formulate an organisational learnership model. The presentation of the learnership model for effective learnership implementation solved sub-problem two and was used for the compilation of the survey questionnaire to establish the extent to which organisations agree or disagree with the model developed in this study. Structured interviews were conducted with the survey questionnaire and was designed to elicit responses to questions that could be statistically analysed to determine the extent to which respondents concur with the theoretical model.

The structured interview was administered while asking more in-depth questions, which allowed the structured interview to become more unstructured in nature. This was necessary to draw out the qualitative data required to focus on the ‘first hand experience’ of the individual organisational experiences. The results obtained were used to adapt the theoretical model, and align it with the views of the majority of respondents. The successful completion of this phase resulted in the solving of sub-problem three.
5.3 CONDUCTING THE EMPIRICAL STUDY

The empirical study was conducted by means of a structured interview discussion. A questionnaire was developed for this purpose and served as a measuring instrument and to guide the questioning. The data from the questionnaire was analysed, and the results elaborated upon. The qualitative data gathered during the change from the structured questions, to more in-depth questioning aided more valuable understanding of the respondent’s views relating to the themes being explored.

5.3.1 Collecting original data

During the research study a considerable amount of ‘secondary data’ was collected as result of the literature search. Many research projects, regardless of the research paradigm, use more than one method for collecting data (Hussey and Hussey, 1997, p. 140). Figure 5.2 shows the main methods of ‘primary data’ or ‘original data’ collection. Regarding the overall research design decisions and methodology adopted, further decisions on selecting methods of data collection, and analysis need to be considered (Collis and Hussey, 2003, p. 151).

The methods used do not necessarily provide quantitative or qualitative data; however, it depends on how the methods are structured and used (George and Jones, 2002, p. 675).

<table>
<thead>
<tr>
<th>Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Critical incident technique</td>
</tr>
<tr>
<td>• Diaries</td>
</tr>
<tr>
<td>• Focus groups</td>
</tr>
<tr>
<td>• Interviews</td>
</tr>
<tr>
<td>• Observation</td>
</tr>
</tbody>
</table>
The researcher conducted the structured interviews using the questionnaire to collect data. The reason for this is that the quantitative approach would allow for the interpretation of the data relatively easily and speedily (Hussey and Hussey, 1997, p. 151). However, the qualitative questioning approach used during the structured interviews was conducted to overcome potential response biases, and provide for greater validity and reliability of the study (Hussey and Hussey, 1997, p. 74).

Collis and Hussey (2003, p. 168) caution researchers as to the various problems associated with conducting interviews. The whole process is very time consuming and costly. There are also the issues of maintaining the anonymity of participants, together with reassuring the organisation of the confidentiality of the information sought. Interviews must be conducted in the same way, with questions posed similarly so that the respondent understands the question in the same way. The authors stress the potential negative bias the interviewer could have on the process, specifically the elements of class, race or sex bias.

Rosenthal (Hussey and Hussey, 1997, p. 157) refers to research that may have ‘sexual biases’, based on research conducted to determine why male and female researchers sometimes obtain significantly different data from their subjects. Interviewees have certain expectations of the interviewer and will give what they consider a ‘correct’ or acceptable response.
The events that have taken place prior to the interview may also affect the interviewees responses i.e. the interviewees may have received either a salary increase, a cut in work hours or a reprimand. Another down side is that interviews are conducted one-on-one; however, sometimes the interviewees may be accompanied by another person to ensure that all the questions may be answered. The dynamics of the interview change as the interviewees are ‘wearing two hats’ i.e. the interviewees would have different perceptions on questions based on their individual frame of reference (Hussey and Hussey, 1997, p. 158).

Despite these disadvantages, the researcher postulates that an interview permits a higher degree of confidence in the replies than questionnaire responses. The researcher can take account of non-verbal communications and behaviour of the interviewee. When conducting interviews as part of a positivist survey there are strict rules that the interviewer must be abide by if bias is to be kept to a minimum. Brenner (Hussey and Hussey, 1997, p. 158) recommends that the following rules be followed with structured interviews:

- read the questions as they are worded in the questionnaire,
- read slowly and use correct intonation and emphasis,
- ask the questions in the correct order,
- ask every question that applies,
- use response cards when required,
- record exactly what the respondent says,
- do not answer for the respondent,
- show a neutral interest in the answers given by the respondent,
- make sure that each answer has been understood and that it is adequate, and
- do not show approval or disapproval of any answer.
Conclude by thanking interviewed respondent and reassure them that the information will be treated as confidential (Collis and Hussey, 2003, p. 171). Researchers have ethical obligations when conducting the research project. There is much commentary and debate as to ethical principles that should be applied when conducting research in, Hussey and Hussey (1997, p. 38) and George and Jones (2002, p. 688).

Kervin (1992, p. 38) however, provides a checklist for the promotion of ethical research:

- will the research process harm participants or those about whom information is gathered (indirect participants)?,
- are the findings of this research likely to cause harm to others not involved in the research?,
- are you violating accepted research practice in conducting the research and data analysis, and drawing conclusions?, and
- are you violating community standards of conduct?

If researchers could answer these ethically constructed questions in the affirmative, the researcher may be found in a compromising position. Thus, the researcher took cognisance of interview bias, and the ethical considerations as part of this research study.

5.3.2 Designing the questionnaire

A questionnaire is a list of carefully structured questions, chosen after considerable testing, with the view to eliciting reliable responses from a chosen sample. The aim of a questionnaire is to find out what a selected group of participants do, think or feel. A positivist approach suggests that closed questions should be used, and is a crucial element of data collection. As with structured interviews, each respondent must
understand the question in the same way (Hussey and Hussey, 1997, p. 161).

The length of a questionnaire depends on the type of respondent. Depending on the need of the respondent, a questionnaire can require up to ten minutes to complete. Longer than that would seem to risk causing the respondents to ‘put off’ completing the questionnaire until they have more time. The length of time it takes to complete the questionnaire can be determined during the piloting phase (Allison, O’Sullivan, Owen, Rice, Rothwell and Saunders, 1996, p. 75).

Presentation can do much to encourage and help respondents to complete a questionnaire correctly, and it can also make the subsequent analysis of data much easier. The questionnaire purpose must be apparent; the respondents must know the context in which the questions are being posed. This can be achieved by attaching a covering letter or by starting off the questionnaire with an explanatory paragraph (Collis and Hussey, 2003, p. 175).

There is much debate regarding the best location for the classifying questions which ask about the respondents’ age, education, etc. Some authors believe that they are best placed at the beginning of the questionnaire, so that respondents gain confidence in answering easy questions. Others prefer to place them at the end, so that the respondents start with more interesting questions. It is essential to pilot and test the questionnaire as fully as possible before distributing it. Try out the questionnaire on people who are similar to those in the sample (Hussey and Hussey, 1997, p. 163).

The main components of questionnaires are (Allison, et al., 1996, p. 75):

- a title,
• a case number uniquely identifying each completed questionnaire,
• introductory remarks; if there is no covering letter these will include the usual contents of such a letter,
• instructions for completing items; unless self evident, they are given just before the first items requiring a new mode of completion,
• respondent data; these cover matters such as age, education, job title, level of management, etc. Usually it is not the primary purpose of the questionnaire to gather such data, rather it permits the analysis of the views, opinions and perceptions that these kind of people hold,
• focal data, these items gather data on the opinions and views that lie at the core of the study,
• open questions, to capture topics that might otherwise have escaped notice, and
• closing remarks; always thank the respondent and indicate how to return the completed questionnaire back to the researcher.

Cost is often an important element when it comes to deciding on the best method to distribute the questionnaire and this will depend on the size and location of the sample. Distribution methods are as follows (Hussey and Hussey, 1997, p. 163):

• by post,
• by telephone,
• face-to-face,
• group distribution, and
• individual distribution.

Schnetler, Stroker, Dixon, Herbst and Geldenhyse (1989, p. 16-19) comment that post is the most commonly and reasonably inexpensive method used, even if a large sample is necessary. The questionnaire and covering letter are posted to the sample population, usually with a prepaid envelope for returning the completed questionnaire. Postal
distribution of the questionnaire is easy to administer, although the response rate can be very low.

Welman and Kruger (1999, p. 152) elaborate on response rates, and state that 10 per cent or less are uncommon and that it introduces the problem of sample bias. The reason for this is that those who may have responded could have a particular interest in the topic, and therefore are not representative of the population. Gillham (2000, p. 48) agrees and states that if the response rate is less than 30 per cent then the value and validity of the method and results are in question.

Hussey and Hussey (1997, p. 164) clarify questionnaire non-response bias. There are two types: questionnaire non-response, where the questionnaires are not returned at all; and item non-response, where some of the questions in the questionnaire have not been answered. Non-response is crucial in a questionnaire survey, as the research design will be based on the fact that the researcher will generalise from the sample to the population. A large number of item non-responses in a questionnaire are usually evidence that the question was faulty and should be omitted from the analysis.

5.3.3 Designing questions

Questions are used as the vehicle for extracting the primary research data. When designing questions it is essential to have a substantial amount of knowledge regarding the subject, so that the most appropriate questions may be asked. Also it is important to keep the potential audience in mind, as this will guide the level of question complexity (Hussey and Hussey, 1997, p. 165).

Questions are designed to obtain factual information from respondents and use ‘closed’ questions. Other questions that seek opinions are
‘open-ended’ and not suitable for analysis. Closed questions are where the respondent’s answer is selected from a number of predetermined alternatives, normally termed ‘multiple choice answers’. Closed questions are convenient as they usually allow for easy analysis, since the range of potential answers are limited (Riley, Wood, Clarke, Wilkie and Szivas, 2000, p. 82).

Factual questions using closed, or multiple choice answers do not allow any flexibility for the respondent. To allow participants more discriminating responses a ‘rating scale’ is provided. The ‘Likert scale’ is frequently used, which turns a question into a statement and asks the respondents level of agreement with the statement (Hussey and Hussey, 1997, p. 181).

Another critical area when designing questions is question validity and reliability. Reliability is concerned with obtaining the same results from a repeated research. Validity is concerned with the extent to which the research findings accurately represent what is happening in the situation; i.e. the data collected is a true picture of what is being studied (Hussey and Hussey, 1997, p. 173). There are three ways of estimating the reliability of the responses to questions (Sekaran, 2000, p. 206):

- test re-test method: the questions are asked of the same people, but on two separate occasions, with the results correlated,
- split-halves method: the questionnaires are divided into two equal piles. The responses to the first half of the questions in the questionnaire of first pile, are correlated with the second half of the questions from the second pile, and
- internal consistency method: every item or question is correlated with every other item across the entire sample and the average inter-item correlation is taken as an index of reliability.
Kemp (Berry, 2003, p. 212) stresses three types of validity that particularly need to be considered in the use of a questionnaire as a measuring instrument. The three main areas are content validity, construct validity, and face validity. The evaluation of the validity of the questionnaire can be achieved by:

…”a logical explanation of the items to determine if they adequately represent the subject being investigated [content], if they relate to the 'construct' being tested, and if they appear at 'face' value to be suitable”.

The researcher noted these pertinent comments on instrument and question design, and integrated them into the research survey questionnaire.

5.3.4 Establishing the sample

Selecting a sample is a fundamental element of a positivistic study. A sample is made up using some of the members of a population. A population refers to a body of people under consideration for research purposes. A sampling frame refers to a list from which all the sampling units are drawn (Emory and Cooper, 1991, p. 82).

de Vos, Strydom, Foché and Delport (2002, p. 201) and Hussey and Hussey (1997, p. 144) emphasise the importance of a representative sample, or a good sample. A representative sample is one in which the results obtained form the sample can be taken to be true for the whole population. A representative sample will allow the researcher to generalise from the results. A good sample must be (Hussey and Hussey, 1997, p. 145):
chosen at random (every member of the population must have a chance of being chosen),
large enough to satisfy the needs of the investigation being undertaken, and
be unbiased.

In a technical paper by DSS Research (2001, p. 1), the authors comment on two major forms of sampling error that might occur in surveys; namely, random error and systematic error. The authors remark that inexperienced researchers must be aware of these forms of sampling error, as even in a complete census of all known members of a population, the census is subject to these forms of error.

Random error is the difference between the sample results and the true results. This form of error may be reduced by increasing the sample size. Systematic error occurs when the sample results consistently vary in one direction, either higher or lower, from the true values for the specific population. This form of error relates to errors in the sample design, and errors in the measurement thereof (DSS Research, 2001, p. 1).

Sampling has an important bearing on the generalisations of the population. Welman and Kruger (1999, p. 47) and Saunders, Lewis and Thornhill (2000, p. 153) distinguish between probability samples and non-probability samples. Probability sampling determines the probability that any element or member of the population will be included in the sample. Non-probability sampling by contrast cannot specify this probability. Types of probability samples are (Welman and Kruger, 1999, p. 47):

- simple random samples,
- stratified random samples,
- systematic samples,
• cluster samples.

Types of non-probability samples are:

• accident or incidental samples,
• purposive samples,
• quota samples, and
• snowball samples.

Random sampling occurs when members from the population are chosen at random. A sample must be large enough to ensure that some of the extreme members (very high or very low) are chosen in the sample. The larger the sample the better it will represent the population as a whole. Bias occurs if samples are chosen deliberately by a person, as this will lead to favoritism, or chosen in a haphazard fashion. An unbiased sample is one which will give the views of each section of a population in a balanced way and should be made up of members from each section of the population (Hussey and Hussey, 1997, p. 145).

Welman and Kruger (1999, p. 52) define simple random sampling as:

“Each member of the population has the same chance of being included in the sample and each sample of a particular size has the same chance of being chosen”.

Hussey and Hussey (1997, p. 148) cite Czaja and Blair (1996) who discuss various factors in detail, regarding the appropriate sample size. The critical question is, ‘how accurate and precise do researchers want the results of their study to be? Researchers should also consider previous studies to establish an indication of anticipated responses (Hussey and Hussey, 1997, p. 149). There is much debate as to the
correct sample size by authors. However, Sekaran (2000, p. 297) summarises the factors affecting decisions on sample size:

- the extent of the precision desired (the confidence interval),
- the acceptable risk in predicting that level of precision (confidence level),
- the amount of variability in the population itself,
- the cost and time constraints, and
- the size of the population itself.

Ghezzo (2002, p. 1) provides a summation of sample size and comments that sample sizes estimated are approximations. Always err in a conservative way and estimate a sample size greater than what is really needed. Excess precision is not bad, only expensive. Low precision is not only bad, but wastes resources, work and time; and the results obtained will be useless for another application.

In the case of the sample for this study where the population was reasonably small, i.e. less than 10, the entire population of each chamber of the MERSETA was surveyed. This allowed the research outcomes of this study to be more precise, although it was time and cost intensive.

5.4 PILOTING THE QUESTIONNAIRE

A pilot survey is a scaled down version of the full survey. Allison et al. (1996, p. 51) outline the process for conducting the initial or first draft pilot survey:

- collect a small portion of the data,
- stop the survey,
- assess information obtained, and
• modify full survey as required before undertaking it.

The key point is that the initial draft pilot survey should not take too long to do, but should cover sufficient subject matter in order to determine if there is any design concerns (Allison et al., 1996, p. 51).

The process proceeds to an extended piloting of the first version of the questionnaire on typical respondents. A pilot run is done on 10 to 25 respondents who are of similar ability and background to the survey target population, before hundreds of questionnaires are sent out (Allison et al., 1996, p. 95). The researcher will be able to obtain an assessment of the validity of the questions as well as the likely reliability of the data that will be collected (Saunders et al., 2000, p.305).

The researcher’s role is to note any perceived ambiguity or lack of clarity for re-wording. Methodological purity requires that the respondents to the piloting phase be excluded from the final version of the questionnaire, as contact with them may have altered their views, and thus can no longer be suitable for a representative sample (Allison et al., 1996, p. 95).

The researcher’s approach in this study consisted of three phases. The first was to obtain a statistician's assessment of the feasibility of the questionnaires design, for analysis purposes. Secondly, three Human Resources Practitioners (HRP) who were representative of the population made recommendations for amendment to the questionnaire. Thirdly, the amended questionnaire was re-run on a new group of five HRP’s to refine the questionnaire to its final form (refer Appendix B).
5.5 THE COVERING LETTER

Salkin (2000, p. 140) stipulates that a questionnaire must contain a covering letter. The reason for this is that it establishes a sense of authority and conveys the importance of the project.

Leedy (1997, p. 196) states that the initial letter should be carefully and thoughtfully structured and should stress the concerns of the person receiving the letter, rather than any selfish interests of the sender. Allison et al. (1996, p. 91) agrees and asserts that respondents to the questionnaire need an explanation as to why they should co-operate by completing it. This usually calls for a covering letter made up of the following contents:

- why the survey is being conducted,
- who is sponsoring it or who has authorised it,
- who is doing it,
- why the respondent should fill it in,
- how soon the completed questionnaire is needed,
- what is going to happen to the findings,
- how the respondents privacy will be respected through anonymity, and
- respondent thanked for co-operating.

As it is rare to get a 100 per cent response to the first mailing, a follow-up plan with a covering letter should be prepared from the beginning (Allison et al., 1996, p. 96). An effective practice to increase survey response rates is to communicate ahead of time and prepare respondents for the coming survey, and also to explain the value and importance of the survey (Guidestar communication, 2003, p. 1).
The researcher communicated ahead of time by telephone and briefed respondents as to the imminent survey. A covering letter, together with a follow-up letter for submission with the questionnaire was prepared (refer Appendix A).

5.6 IMPLEMENTING THE QUESTIONNAIRE

The names, telephone numbers, and electronic mail addresses of organisations (unit of analysis) operating in the Automobile and New Tyre chambers of the MERSETA were obtained from the relevant chamber head offices.

The researcher telephonically briefed respondents as to the impending survey prior to forwarding the survey documents. The electronic versions of the questionnaire and covering letter were then mailed to the organisations. One week later the individuals were contacted and appointments set up to facilitate the completion of the questionnaire. The quantitative survey was administered and qualitative information drawn out as to the individual organisational experiences in implementing learnerships. Where necessary organisations out of the geographical area of Port Elizabeth and the Eastern Cape were contacted and the survey facilitated by telephone.

Allison et al. (1996, p. 95) state that the timing of the follow-up is difficult to pre-determine, however it is best done when the responses begin to flatten out. Any subsequent follow-up should be timed in the same way as depicted in the cumulative responses curve illustrated in figure 5.3 (Allison et al., 1996, p. 96). Organisations who did not respond were followed up with to determine their participation in the survey. Organisations that were willing to participate were surveyed using the structured and unstructured methods to determine their views.
Figure: 5.3: Cumulative responses curve.


A follow-up was made to individuals who had not responded after four weeks were sent an electronic mail reminder emphasising the importance of contacting the researcher for facilitation of the questionnaire. A new mail message was sent with a follow up letter (refer Appendix C).

5.7 CONCLUSIONS

This Chapter provided a comprehensive review of the research methodology used in the research study.

The discussion provided evidence that the researcher needed to pay particular attention to sampling error, and ensuring the validity of questionnaire design, to assure its reliability. In Chapter six the researcher will undertake the analysis and interpretation of the responses to the survey, which was undertaken in terms of the guidelines established in Chapter five.
CHAPTER 6

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CHAPTER 6

ANALYSIS AND INTERPRETATION OF THE EMPIRICAL STUDY

6.1 INTRODUCTION

The research methodology used during the research study was described in Chapter five. The purpose of Chapter six is to investigate inherent meanings from the research data obtained from the empirical study. The research results will draw inferences and identify emerging themes from the data. The data will be analysed and interpreted in terms of the following arrangement; Section A: biographical data of respondents, Section B: the use of learnership programmes, Section C: a process model for effective learnership implementation.

The aim of Chapter six is to assist in resolving the third sub-problem, namely:

**SUB-PROBLEM THREE**

To what extent do the methods used by organisations within the Manufacturing Engineering and Related Services Education and Training Authority (MERSETA) chambers differ from those suggested in the literature?

The results from Section A are presented with an interpretation of the profile of respondents. Section B outlines the status of learnership implementation by the responding organisation, and potential reasons for not utilising formal learnership programmes. Section C of the questionnaire allows verification of the process model for effective learnership implementation that emerged from literature.
The research findings from Sections A, B and C have been organised in the same sequence as the questions appear in the survey questionnaire (refer Appendix B).

6.2 THE RESPONSE RATE

MERSETA is made up of five chambers that form part of its demarcation namely, the chamber Plastics, chamber Metal and Engineering, chamber Motor Retail, chamber Automobile, and chamber New Tyre. The Plastics chamber has plus minus 1200 organisations (units of analysis), Metal and Engineering chamber has plus minus 9284 organisations, and Motor Retail chamber has plus minus 2958 (MERSETA, 2003, p. 24). These chambers have different sizes of organisations, which indicate different strata’s of unit of analyses, and information is sketchy or most available as to their composition, and nature of work.

The two chambers that were selected due to their similarity in terms of nature were the Automobile and New Tyre chambers. Their similarity was due to similar population size in terms of the unit of analysis, i.e. Automobile has a population of seven, and New Tyre has a population of four. These two chambers are similar, relative to the other chambers even though the actual quantum of unit of analyses does not exactly equal one another. The chambers have further similarities due to the nature of operations, i.e. manufacturing and assembly processes, the large number of employees employed by chamber organisations, and the advanced stage in implementing and managing learnerships.

The employer organisations that make up the Automobile chamber are Ford South Africa, BMW South Africa, Nissan South Africa, Toyota South Africa, General Motors South Africa, Daimler Chrysler South Africa, and Volkswagen South Africa. The employer organisations that made up the New Tyre chamber are Bridgestone Firestone South Africa, Continental
Tyre South Africa, Dunlop Tyres International, and Goodyear South Africa. The labour stakeholder representation in these two chambers is the National Union of Metal Workers (NUMSA) and Solidarity.

CHART 6.1
DEPICTION OF THE RESPONSE RATE

<table>
<thead>
<tr>
<th>Percentage Participation in Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
</tr>
<tr>
<td>80%</td>
</tr>
<tr>
<td>60%</td>
</tr>
<tr>
<td>40%</td>
</tr>
<tr>
<td>20%</td>
</tr>
<tr>
<td>0%</td>
</tr>
</tbody>
</table>

**MERSETA Chambers**

<table>
<thead>
<tr>
<th>Outstanding</th>
<th>Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Tyre Chamber</td>
<td>1</td>
</tr>
<tr>
<td>Automobile Chamber</td>
<td>2</td>
</tr>
</tbody>
</table>

Source: Respondents to the survey.

There were five respondents from the Automobile chamber, and three respondents from the New Tyre chamber as reflected in Chart 6.1. Emory and Cooper (1991, p. 333) and Saunders, Lewis and Thornhill (2000, p. 158) agree that a 30 per cent response rate is a reasonable and acceptable response for a postal surveys.
Bluen and Goodman as quoted by Welman and Kruger (1999, p. 152) report that response rates of 36 per cent in South African postal surveys for registered personnel practitioners may be expected.

A response rate of 71 per cent for the Automobile chamber, and 75 per cent for the New Tyre chamber was obtained in this research study. The researcher postulates that the response was considered above average and thus acceptable for the purpose of this study.

6.3 ANALYSIS AND INTERPRETATION OF BIOGRAPHICAL DATA OF SECTION A

Section A of the questionnaire captured the respondent's biographical information. The questions were designed to highlight independent variables that could be used to facilitate comparisons between responses to the dependant variables to the responses to questions in Section B and C.

As indicated there were five respondents from the Automobile chamber, and three respondents from the new Tyre chamber. The organisational size, province, region or area, and respondents' highest qualifications were not analysed and interpreted.

The reason for this was to maintain the confidentiality of the respondents and their organisations due to the size of the population being relatively small.
TABLE 6.1
RESPONDENTS ACCORDING TO CURRENT POSITION

<table>
<thead>
<tr>
<th>CURRENT POSITION</th>
<th>AUTOMOBILE</th>
<th>NEW TYRE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skills Development Facilitator</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Human Resources Manager</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Human Resources Officer</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Training Manager</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Training Officer</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Other</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>TOTAL</td>
<td>6</td>
<td>5</td>
</tr>
</tbody>
</table>

Actual Number of Respondents 5 3

Source: Results obtained from an analysis of the current position of respondents.

From Table 6.1 it can be seen that the respondents from the Automobile chamber and New Tyre chambers biographical details indicate current positions of Training Managers and Skills Development Facilitators. one respondent from the Automobile chamber fulfilled a dual portfolio of Training Manager and Skills Development Facilitator, while one respondent selected the ‘other’ category.

Explanation of the ‘other’ category by the respondent indicated a specialist portfolio related to learnership project implementation. There were two respondents from the New Tyre chamber indicated that they fulfill dual portfolios as a Training Manager and Skills Development Facilitator. The respondents to the research study were the most appropriate participants as training manages and skills development facilitators would be actively involved in organisational skills development and learnership implementation.
TABLE 6.2
RESPONDENTS ACCORDING TO LENGTH OF SERVICE

<table>
<thead>
<tr>
<th>LENGTH OF SERVICE</th>
<th>AUTOMOBILE</th>
<th>NEW TYRE</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 - 5 years</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>6 - 10 years</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>11 - 15 years</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>More than 15 years</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>TOTAL</td>
<td>5</td>
<td>3</td>
</tr>
</tbody>
</table>

Source: Results obtained from an analysis of respondents' length of service and experience.

Interpretation of the results from Table 6.2 show the length of service and experience of respondents in their current positions, as 11 to 15 years, and more experience for the Automobile chamber. A summary of the results of the length of service for the New Tyre respondents in their current positions showed five years, and more experience.

The respondents to the research study hold positions at high levels within their organisations and are representatives at an industry chamber level of MERSETA.

Although the respondents' experience in their current positions may be short in some instances, this indicates that they would have had to have much experience in driving skills development processes prior to the current positions which they hold within their organisation.
TABLE 6.3
RESPONDENTS ACCORDING TO LEARNERSHIP WORKSHOP ATTENDANCE

<table>
<thead>
<tr>
<th>LEARNERSHIP WORKSHOP ATTENDANCE IN THE LAST 2 YEARS</th>
<th>AUTOMOBILE</th>
<th>NEW TYRE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, I have attended</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>No, I have not attended</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>5</strong></td>
<td><strong>3</strong></td>
</tr>
</tbody>
</table>

Source: Results obtained from an analysis of respondents attendance at a learnership workshop within the last two years.

Table 6.3 shows that four out of the five respondents from the Automobile chamber had attended a learnership workshop within the last two years. Likewise all respondents from the New Tyre chamber had attended a learnership workshop within the last two years. The majority of respondents have had continuous exposure to the latest information relating to learnerships.

Analysing all the data from Section A, and summarising the results from all the respondents indicated and confirmed that in both the Automobile and New Tyre chambers, the most suitable and experienced individuals responded to the research study.
6.4 QUANTITATIVE ANALYSIS OF RESULTS OF SECTION B OF THE QUESTIONNAIRE

The quantitative analysis in this section followed a format of stating the phase to be interpreted, a frequency table indicating the actual respondents’ views, and an interpretation of the results furnished.

This section simultaneously analyses the respondents’ views that pertain to the Automobile chamber, and New Tyre chamber for questions B.1, B.2, and B.3. The following sub-section concentrates on an analysis of Section B.1 from the questionnaire, the ‘use of learnership programmes’.

**TABLE 6.4**
RESPONDENTS ACCORDING TO ORGANISATIONAL STATUS REGARDING LEARNERSHIP IMPLEMENTATION, AUTOMOBILE CHAMBER

<table>
<thead>
<tr>
<th>ORGANISATIONAL LEARNERSHIP IMPLEMENTATION</th>
<th>RESPONSE FREQUENCY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not planning to implement at this stage</td>
<td>0</td>
</tr>
<tr>
<td>Planning to implement shortly</td>
<td>2</td>
</tr>
<tr>
<td>Implementation in process</td>
<td>1</td>
</tr>
<tr>
<td>Re-implementing the same and/or different learnership/s</td>
<td>2</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>5</strong></td>
</tr>
</tbody>
</table>

Source: Results obtained from an analysis of respondents organisational status regarding learnership implementation (Automobile chamber).

Table 6.4 showed the results from question B.1 for the Automobile chamber, and reflected that two units of analyses are planning to
implement learnerships shortly; one is in the process of implementing learnerships, while two are re-implementing the same and/or different learnership/s. All respondents to question B.2, except for one, were using formal learnerships as a strategy to enhance employee development as part of the Skills Development Act.

The following sub-section focuses on the analysis of question B.1 from the questionnaire, the ‘use of learnership programmes’ in the New Tyre chamber (see Table 6.5).

**TABLE 6.5**
**RESPONDENTS ACCORDING TO ORGANISATIONAL STATUS REGARDING LEARNERSHIP IMPLEMENTATION**
**NEW TYRE CHAMBER**

<table>
<thead>
<tr>
<th>ORGANISATIONAL LEARNERSHIP IMPLEMENTATION</th>
<th>RESPONSE FREQUENCY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not planning to implement at this stage</td>
<td>0</td>
</tr>
<tr>
<td>Planning to implement shortly</td>
<td>2</td>
</tr>
<tr>
<td>Implementation in process</td>
<td>0</td>
</tr>
<tr>
<td>Re-implementing the same and/or different learnership/s</td>
<td>1</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>3</strong></td>
</tr>
</tbody>
</table>

Source: Results obtained from an analysis of respondents organisational status regarding learnership implementation (New Tyre chamber).
The results from question B.1 for the New Tyre chamber in Table 6.5 reflected that two units of analyses are planning to implement learnerships shortly; and one is in the process of re-implementing the same and/or different learnership/s. All respondents to question B.2, except for one were using formal learnerships as a strategy to enhance employee development as part of the Skills Development Act.

Analysis of the results from questions B.1, and B.2 of Section B of the survey show that the respondents from both chambers are actively utilising learnerships, and planning to implement learnerships shortly.

This experience of actively planning and implementing learnerships confirmed that the feedback from the respondents was credible, and increased the validity of the research study findings.

What follows is an analysis and interpretation of why organisations may not use formal learnership programmes. One respondent indicates their view as to the reasons why organisations may not be utilising formal learnership programmes for question B.3.
### TABLE 6.6
RESPONSE ACCORDING TO REASONS WHY ORGANISATIONS MAY NOT BE UTILISING FORMAL LEARNERSHIP PROGRAMMES, AUTOMOBILE CHAMBER

<table>
<thead>
<tr>
<th>Reasons for not utilising formal learnership programmes</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of an organisational need</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Learnerships are too costly to implement</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Insufficient legislative grants and incentives for learnership implementation</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Lack of know how on how to implement learnerships</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Line management not prepared to commit time/resources to implementing learnerships</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Organisational culture and/or climate is not conducive to learnership implementation</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Previous attempts to execute learnerships were unsuccessful</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Insufficient impact of learnerships on organisational goals</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Increased industrial relation issues related to learnership implementation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Party's roles, responsibilities and accountabilities regarding learnerships are not clear</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Management and/or organisation believe that requisite skills will develop naturally</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

Source: Results obtained from an analysis of respondents as to the reason why organisations may not be utilising from all learnership programmes (Automobile chamber).

In Table 6.6 there was agreement with the view that the reasons for organisations not utilising formal learnership programmes were a combination of: no organisational need, insufficient legislative grants and
incentives for learnership implementation, party's roles responsibilities and accountabilities regarding learnerships not being clear, lack of know how on how to implement learnerships, and line management not prepared to commit time/resources to implementing learnerships.

There was disagreement with the views that organisational culture and/or climate are not conducive to learnership implementation, learnerships are too costly to implement, and there is insufficient impact of learnerships on organisational goals.

There was however a strong disagreement with the views that the reasons for organisations not utilising formal learnership programmes was that management and/or the organisation believe that requisite skills will develop naturally, and previous attempts to execute learnerships were unsuccessful.

The respondent’s view was uncertain with regard to the increased industrial relation issues related to learnership implementation.

One respondent from the New Tyre chamber shared their view as to the reasons why organisations may not be utilising formal learnership programmes.
## TABLE 6.7
RESPONSE ACCORDING TO REASONS WHY ORGANISATIONS MAY NOT BE UTILISING FORMAL LEARNERSHIP PROGRAMMES, NEW TYRE CHAMBER

<table>
<thead>
<tr>
<th>Reasons for not utilising formal learnership programmes</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of an organisational need</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Learnerships are too costly to implement</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Insufficient legislative grants and incentives for learnership implementation</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Lack of know how on how to implement learnerships</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Line management not prepared to commit time/resources to implementing learnerships</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organisational culture and/or climate is not conducive to learnership implementation</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Previous attempts to execute learnerships were unsuccessful</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Insufficient impact of learnerships on organisational goals</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Increased industrial relation issues related to learnership implementation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Party's roles, responsibilities and accountabilities regarding learnerships are not clear</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Management and/or organisation believe that requisite skills will develop naturally</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

Source: Results obtained from an analysis of respondents as to the reason why organisations may not be utilising formal learnership programmes (New Tyre chamber).

In Table 6.7 there was agreement with the view that the reasons for organisations not utilising formal learnership programmes were: line management are not prepared to commit time/resources to implementing
learnerships, and that the organisational culture and/or climate may not be conducive to learnership implementation.

There was disagreement with the views that; there was a lack of an organisational need, insufficient legislative grants and incentives for learnership implementation, increased industrial relation issues related to learnership implementation, party's roles, responsibilities and accountabilities regarding learnerships are not clear, and that management and/or the organisation believe that requisite skills will develop naturally.

The respondent's view was uncertain with regard to the reasons for organisations not utilising formal learnership programmes: the lack of know how on how to implement learnerships, insufficient impact of learnerships on organisational goals, learnerships being too costly to implement, and that previous attempts to execute learnerships were unsuccessful.

The two respondents' views from the Automobile, and New Tyre chambers were compared and interpreted in Table 6.8. To compare the two chambers more accurately the Automobile respondent is coded by using an 'A', and the New Tyre respondent coded by using a 'N'. Where the respondents views are similar the coding would be denoted by an 'S', to indicate the similar views of the respondents from the two chambers.
TABLE 6.8
RESPONDENTS ACCORDING TO REASONS WHY ORGANISATIONS MAY NOT BE UTILISING FORMAL LEARNERSHIP PROGRAMMES, AUTOMOBILE AND NEW TYRE CHAMBERS

<table>
<thead>
<tr>
<th>Reasons for not utilising formal learnership programmes</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of an organisational need</td>
<td>A</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Learnerships are too costly to implement</td>
<td></td>
<td>N</td>
<td>A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Insufficient legislative grants and incentives for learnership implementation</td>
<td>A</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lack of know how on how to implement learnerships</td>
<td>A</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Line management not prepared to commit time/resources to implementing learnerships</td>
<td></td>
<td>S</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organisational culture and/or climate is not conducive to learnership implementation</td>
<td>N</td>
<td>A</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Previous attempts to execute learnerships were unsuccessful</td>
<td>N</td>
<td>A</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Insufficient impact of learnerships on organisational goals</td>
<td></td>
<td>N</td>
<td>A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increased industrial relation issues related to learnership implementation</td>
<td>A</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Party's roles, responsibilities and accountabilities regarding learnerships are not clear</td>
<td>A</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Management and/or organisation believe that requisite skills will develop naturally</td>
<td></td>
<td>N</td>
<td>A</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Results obtained from an analysis of respondents as to the reason why organisations may not be utilising formal learnership programmes between the Automobile and New Tyre chambers (Automobile ‘A’ and New Tyre ‘N’ chamber, and where there is similarity ‘S’).
Table 6.8 shows that there are divergent views as to the reasons why organisations may not be utilising formal learnership programmes. There is however agreement in the aspect that line management may not be prepared to commit time/resources to implementing learnerships. Furthermore, there is agreement that the requisite skills that organisations may need will not develop naturally.

There are areas where the respondent’s views are grouped and were close to one another, although not similar in nature. The following views held by respondents were split between an uncertain view and a disagreement point of view:

- Learnerships are too costly to implement,
- Insufficient impact of learnerships on organisational goals, and
- Increased industrial relation issues related to learnership implementation.

The respondent’s point of view was also split between an uncertain point of view, and an agreement point of view on the following point:

- Lack of know how on how to implement learnerships.

Interpreting and summarising the respondents’ views, it seems that organisations may believe that learnerships are cost effective, can positively impact on organisational goals and can be implemented without many employee relation problems. Also, there may be a need for more knowledge, skills and ‘know how’ to implement learnerships. These inferences, however, remain to be substantiated. There should be further focused reviews into these areas before more concrete and objective deductions can be made, as this section of data was not part of the primary purpose of this research study.
6.5 QUANTITATIVE ANALYSIS OF RESULTS OF SECTION C OF THE QUESTIONNAIRE

The following sub-section summarises the responses from the Automobile and New Tyre chambers, and provides an analyses of Section C of the questionnaire. Section C surveys the process model for effective learnership implementation, with each phase of the model analysed. The actions that make up each phase are scrutinised, together with the tasks that make up the actions in ‘phase 4: prepare to implement learnership’.

TABLE 6.9
RESPONDENTS ACCORDING TO CONDUCTING ORGANISATIONAL SKILLS PLANNING: PHASE 1, AUTOMOBILE CHAMBER

Conduct organisational skills planning: Phase 1

<table>
<thead>
<tr>
<th>Actions for conducting organisational skills planning</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perform an organisational skills analysis</td>
<td>1</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Integrate learnerships into organisational Human Resources Development Strategy</td>
<td>1</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Results obtained from an analysis of respondents according to the actions required for the conduction of organisational skill planning (Automobile chamber).
The analysis of ‘phase 1: conduct organisational skills planning’ for the Automobile chamber indicated that there is agreement and strong agreement with the actions required for the conduction of organisational skills planning (see Table 6.9).

**TABLE 6.10**

RESPONDENTS ACCORDING TO CONDUCTING ORGANISATIONAL SKILLS PLANNING: PHASE 1, NEW TYRE CHAMBER

Conduct organisational skills planning: Phase 1

<table>
<thead>
<tr>
<th>Actions for conducting organisational skills planning</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perform an organisational skills analysis</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Integrate learnerships into organisational Human Resources Development Strategy</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Results obtained from an analysis of respondents according to the actions required for the conduction of organisational skill planning (New Tyre chamber).

The respondents view in the New Tyre chamber for the actions required for ‘Phase 1: conduct organisational skill planning’, was agreed and strongly agree with (see Table 6.10).
Establish learnership: Phase 2

<table>
<thead>
<tr>
<th>Actions for establishing a learnership</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Confirm demand for a learnership</td>
<td>2</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Generate unit standards and qualifications for learnership</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Results obtained from an analysis of respondents according to the actions required for establishing a learnership: Phase 2 (Automobile chamber).

‘Phase 2: actions for establishing a learnership’ indicate agreement and strong agreement with the actions necessary for establishing a learnership in the Automobile chamber (see Table 6.11).

However, one respondent disagreed with the action of generating unit standards and qualifications for learnership (see Table 6.11). From an organisational view the respondents view may be interpreted as correct as organisations do not generate unit standards and qualifications for learnerships.

However from a broader learnership process perspective the unit standards and qualifications are necessary and organisations can and should lobby appropriate bodies.
The industry bodies that may be lobbied are, Sector Education and Training Authorities (SETA’s), National Standards Bodies (NSBs) and South African Qualifications Authority (SAQA) to initiate and develop the requisite unit standards and qualifications for the industry and organisations.

**TABLE 6.12**
RESPONDENTS ACCORDING TO THE ESTABLISHING OF LEARNERSHIPS: PHASE 2, NEW TYRE CHAMBER

Establish learnership: Phase 2

<table>
<thead>
<tr>
<th>Actions for establishing a learnership</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Confirm demand for a learnership</td>
<td>1</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Generate unit standards and qualifications for learnership</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Results obtained from an analysis of respondents according to the actions required for establishing a learnership: Phase 2 (New Tyre chamber).

The respondents view in the New Tyre chamber of the actions required for ‘phase 2: establish learnership’ was agree and strongly agree with (see Table 6.12).
## TABLE 6.13

RESPONDENTS ACCORDING TO THE SELECTION AND DESIGN OF LEARNERSHIPS: PHASE 3, AUTOMOBILE CHAMBER

Select and design learnership: Phase 3

<table>
<thead>
<tr>
<th>Actions for selecting and designing a learnership</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select a learnership as an appropriate programme to meet organisational goals</td>
<td>2</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop an organisational workplace project proposal before implementation</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Design a learning programme outlining all learning requirements</td>
<td>2</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Results obtained from an analysis of respondents according to the actions required to select and design a learnership: Phase 3 (Automobile chamber).

‘Phase 3: select and design learnership’ shows a high level of agreement and strong agreement with the actions for selecting and designing a learnership (see Table 6.13). One respondent indicated an uncertain view of developing an organisational workplace project proposal before implementation.

The respondent may have been unclear as to this action’s purpose, and thus indicted this view. However, there still seems to be general agreement as to the balance of respondents’ views.
TABLE 6.14
RESPONDENTS ACCORDING TO THE SELECTION AND DESIGN OF LEARNERSHIPS: PHASE 3, NEW TYRE CHAMBER

Select and design learnership: Phase 3

<table>
<thead>
<tr>
<th>Actions for selecting and designing a learnership</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select a learnership as an appropriate programme to meet organisational goals</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop an organisational workplace project proposal before implementation</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Design a learning programme outlining all learning requirements</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Results obtained from an analysis of respondents according to the actions required to select and design learnership: Phase 3 (New Tyre chamber).

The analysis of views expressed by the New Tyre chamber on 'phase 3: select and design learnership' showed agreement and strong agreement levels (see Table 6.14).
TABLE 6.15
RESPONDENTS ACCORDING TO PREPARING TO IMPLEMENT LEARNERSHIPS: PHASE 4, AUTOMOBILE CHAMBER

Prepare to implement learnership: Phase 4

<table>
<thead>
<tr>
<th>Actions for preparing to implement a learnership</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish a process, and project steering committee to guide implementation</td>
<td>3</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Form implementation partnerships with providers</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop organisational capacity for delivery of the learnership</td>
<td>2</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Obtain workplace provider accreditation</td>
<td>3</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Select and support learners</td>
<td>2</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop learning material from the detailed curriculum</td>
<td>3</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Results obtained from an analysis of respondents according to the actions required to prepare for learnership implementation: Phase 4 (Automobile chamber).

‘Phase 4: prepare to implement learnership’ showed agreement and strong agreement for the actions for preparing to implement a learnership by the Automobile chamber. One respondent disagreed with the action of forming implementation partnerships with providers (see Table 6.15). The respondent in the Automobile chamber may have been interpreting this action as learnerships that are currently being implemented, however from a process perspective perhaps future learnerships may require partnerships with providers.
Still, there seems to be consensus and general agreement as to the applicability of the actions required to select and design a learnership.

**TABLE 6.16**

RESPONDENTS ACCORDING TO PREPARING TO IMPLEMENT LEARNERSHIPS: PHASE 4, NEW TYRE CHAMBER

Prepare to implement learnership: Phase 4

<table>
<thead>
<tr>
<th>Actions for preparing to implement a learnership</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish a process, and project steering committee to guide implementation</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Form implementation partnerships with providers</td>
<td>2 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop organisational capacity for delivery of the learnership</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Obtain workplace provider accreditation</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Select and support learners</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop learning material from the detailed curriculum</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Results obtained from an analysis of respondents regarding the actions that are required to prepare to implement learnership: Phase 4 (New Tyre chamber).

The actions required for ‘phase 4: prepare to implement learnership’, together with the tasks required for learnership preparation were strongly agreed, and agreed to by respondents of the New Tyre chamber (see Table 6.16).
### TABLE 6.17
RESPONDENTS ACCORDING TO PREPARING TO IMPLEMENT LEARNERSHIPS: PHASE 4 (ACTIONS AND TASKS), AUTOMOBILE CHAMBER

Prepare to implement learnership: Phase 4 (actions and tasks)

Please indicate the degree to which you agree/disagree with the following tasks required for preparing to implement learnerships?

<table>
<thead>
<tr>
<th>Tasks for 'Preparing to implement a learnership'</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish a process, and project steering committee to guide implementation by: Establishing a learnership management team</td>
<td>3</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Developing a quality management system including business plan and budget</td>
<td>2</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appointing a project manager to drive the process</td>
<td>3</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scheduling regular meetings to ensure communication</td>
<td>2</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Form implementation partnerships with providers by: Conducting a workshop with employers and providers to develop a broad curriculum and learning programme</td>
<td>2</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Selecting and form partnerships with leading providers</td>
<td>1</td>
<td>3</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deciding on learning activity distribution</td>
<td>3</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Tasks for 'Preparing to implement a learnership' [continued]

<table>
<thead>
<tr>
<th>Task</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Develop organisational capacity for delivery of the learnership by:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conducting a workshop with employer and providers to prepare for accreditation</td>
<td>1</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Setting up an implementation team at workplace and provider</td>
<td>2</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identifying, train and register assessors</td>
<td>3</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Providing training to workplace trainers and mentor (facilitators)</td>
<td>3</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identifying staff required for administration</td>
<td>4</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identifying and obtain any additional equipment and/or other physical resources needed</td>
<td>1</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Orientating existing workforce</td>
<td>2</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Obtain workplace provider accreditation by:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Developing a vision and mission statement regarding the training function</td>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Obtaining and complete an accreditation application form</td>
<td>1</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Developing and document clear policies and/or procedures in accordance with ETQA requirements</td>
<td>1</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Select and support learners by:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Developing learner selection policy, procedures and processes</td>
<td>2</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identifying, select and prepare learners</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recognising Prior Learning of learners</td>
<td>1</td>
<td>3</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Developing individual learning programmes</td>
<td>1</td>
<td>3</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Planning rotation between institutional and workplace learning for each learner</td>
<td>2</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Orientating learners</td>
<td>1</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Signing learnership agreements</td>
<td>4</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Tasks for ‘Preparing to implement a learnership’ [continued]

<table>
<thead>
<tr>
<th>Develop learning material from the detailed curriculum by:</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Developing a detailed curriculum</td>
<td>2</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Selecting and developing learning material</td>
<td>2</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Results obtained from an analysis of respondents according to the actions required to prepare to implement learnership: Phase 4 (Automobile chamber).

The respondents’ view of the tasks relating to the actions required for ‘phase 4: prepare to implement learnership’ for the Automobile chamber are summarised. There was general consensus in agreement and strong agreement for the tasks, except for a few notable exceptions (see Table 6.17).

Two units of analyses (organisations) held an uncertain view of the task, decision of learning activity distribution; and one organisation disagreed with the task of selecting and forming partnerships with leading providers as part of the action ‘form implementation partnerships with providers’.

There was an uncertain view held by four different respondents with the tasks; identifying staff required for administration, identifying, select and prepare learners, Recognising Prior Learning (RPL) of learners, and developing individual learning programmes as part of the ‘select and support learners’ action required in ‘phase 4: prepare to implement learnership’.
It would be presumptuous for the researcher to offer potential interpretations of the respondents regarding their ‘uncertain’ and ‘disagree’ points of view relating to the tasks required to prepare to implement learnerships. It would however be more accurate to conclude that there is generally more agreement on the tasks required to support the actions for phase 4.

**TABLE 6.18**

**RESPONDENTS ACCORDING TO PREPARING TO IMPLEMENT LEARNERSHIPS: PHASE 4 (ACTIONS AND TASKS), NEW TYRE CHAMBER**

Prepare to implement learnership: Phase 4 (actions and tasks)

Please indicate the degree to which you agree/disagree with the following tasks required for preparing to implement learnerships?

<table>
<thead>
<tr>
<th>Tasks for ‘Preparing to implement a learnership’</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish a process, and project steering committee to guide implementation by: Establishing a learnership management team</td>
<td>1</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Developing a quality management system including business plan and budget</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appointing a project manager to drive the process</td>
<td>1</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scheduling regular meetings to ensure communication</td>
<td>1</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tasks for ‘Preparing to implement a learnership’ [continued]</td>
<td>Strongly Agree</td>
<td>Agree</td>
<td>Uncertain</td>
<td>Disagree</td>
<td>Strongly Disagree</td>
</tr>
<tr>
<td>------------------------------------------------------------</td>
<td>----------------</td>
<td>-------</td>
<td>-----------</td>
<td>----------</td>
<td>-------------------</td>
</tr>
<tr>
<td><strong>Form implementation partnerships with providers by:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conducting a workshop with employers and providers to develop a broad curriculum and learning programme</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Selecting and form partnerships with leading providers</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deciding on learning activity distribution</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Develop organisational capacity for delivery of the learnership by:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conducting a workshop with employer and providers to prepare for accreditation</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Setting up an implementation team at workplace and provider</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identifying, train and register assessors</td>
<td>1</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Providing training to workplace trainers and mentor (facilitators)</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identifying staff required for administration</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identifying and obtain any additional equipment and/or other physical resources needed</td>
<td>1</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Orientating existing workforce</td>
<td>1</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Obtain workplace provider accreditation by:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Developing a vision and mission statement regarding the training function</td>
<td>1</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Obtaining and complete an accreditation application form</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Developing and document clear policies and/or procedures in accordance with ETQA requirements</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tasks for ‘Preparing to implement a learnership’ [continued]</td>
<td>Strongly Agree</td>
<td>Agree</td>
<td>Uncertain</td>
<td>Disagree</td>
<td>Strongly Disagree</td>
</tr>
<tr>
<td>-------------------------------------------------------------</td>
<td>----------------</td>
<td>-------</td>
<td>-----------</td>
<td>----------</td>
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</tr>
<tr>
<td><strong>Select and support learners by:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Developing learner selection policy, procedures and processes</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identifying, select and prepare learners</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recognising Prior Learning of learners</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Developing individual learning programmes</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Planning rotation between institutional and workplace learning for each learner</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Orientating learners</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Signing learnership agreements</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Develop learning material from the detailed curriculum by:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Developing a detailed curriculum</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Selecting and developing learning material</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Results obtained from an analysis of respondents according to the actions required to prepare to implement learnerships: Phase 4 (New Tyre chamber).

In Table 6.18 one unit of analysis had an uncertain view as to the task of developing individual learning programmes, as part of the action required ‘select and support learners’ in phase 4. It would be presumptuous of the researcher to interpret the respondents’ view in light of the position of the other respondents’ views.

An interpretation of the New Tyre chamber profile above, and comparing that profile to the Automobile chamber revealed the following. One respondent from the Automobile chamber also held an uncertain view with regard to the task developing individual learning programmes required for the ‘select and support learner’s action’. Further in-depth
analysis of this specific aspect may reveal more information relating to this area. In summary however, there was more agreement with the action and tasks requisite for this phase.

**TABLE 6.19**

RESPONDENTS ACCORDING TO THE IMPLEMENTATION OF LEARNERSHIPS: PHASE 5, AUTOMOBILE CHAMBER

Implement learnership: Phase 5

<table>
<thead>
<tr>
<th>Actions for implementing a learnership</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Implement workplace learning</td>
<td>2</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conduct formative assessment</td>
<td>1</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conduct summative assessment</td>
<td>2</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Results obtained from an analysis of respondents according to implement learnership: Phase 5 (Automobile chamber).

The analysis of ‘phase 5: implement learnership’ indicated a high level of agreement and strong agreement from respondents form the Automobile chamber (see Table 6.19).
### TABLE 6.20
RESPONDENTS ACCORDING TO THE IMPLEMENTATION OF LEARNERSHIPS: PHASE 5, NEW TYRE CHAMBER

Implement learnership: Phase 5

<table>
<thead>
<tr>
<th>Actions for implementing a learnership</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Implement workplace learning</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conduct formative assessment (Refers to assessment that takes place during the process of learning)</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conduct summative assessment (Refers to assessment for making a judgement about achievement and is carried out when a learner is ready to be assessed at the end of a programme of learning)</td>
<td>1</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Results obtained from an analysis of respondents according to the implementation of learnerships: Phase 5, (New Tyre chamber).

The respondents showed strong acceptance of the actions required for ‘phase 5: implement learnership’ form the New Tyre chamber (see Table 6.20).
TABLE 6.21
RESPONDENTS ACCORDING TO THE MONITORING, REPORTING
AND EVALUATING OF LEARNERSHIPS: PHASE 6, AUTOMOBILE
CHAMBER

Monitor, report and evaluate: Phase 6

<table>
<thead>
<tr>
<th>Actions for monitoring, reporting and evaluating</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepare reports for organisation and MERSETA</td>
<td>1</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Determine the cost effectiveness and impact of the learnership</td>
<td>3</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Update organisational Quality Management System based on improvements identified</td>
<td>1</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Results obtained from an analysis of respondents according to the monitoring, reporting and evaluating of learnerships: Phase 6 (Automobile chamber).

The respondents from the Automobile chamber held a view of agreement and strong level of agreement for 'phase 6: monitor, report, and evaluate' (see Table 6.21).
TABLE 6.22
RESPONDENTS ACCORDING TO THE MONITORING, REPORTING AND EVALUATING OF LEARNERSHIPS: PHASE 6, NEW TYRE CHAMBER

Monitor, report and evaluate: Phase 6

<table>
<thead>
<tr>
<th>Actions for monitoring, reporting and evaluating</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepare reports for organisation and MERSETA</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Determine the cost effectiveness and impact of the learnership</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Update organisational Quality Management System based on improvements identified</td>
<td>1</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Results obtained from an analysis of respondents according to the monitoring, reporting and evaluating of learnerships: Phase 6 (New Tyre chamber).

The respondents from the New Tyre chamber showed strong acceptance of the actions required for 'phase 6: monitor, report, and evaluate' (see Table 6.22).

Summarising and interpreting the views of the Automobile chamber, and the New Tyre chamber, respondents show a high level of agreement with the 'process model for effective learnership implementation'.

Due to the interpretation and analysis of the respondents to this survey, and by comparing the specific views of respondents from the Automobile and New Tyre chambers, the researcher concludes that there is an
above average level of acceptance for the ‘process model for effective learnership implementation’.

6.6 REVIEW OF THE QUALITATIVE ANALYSIS WITH A VIEW TO ELIMINATING, ALTERING OR ADDING TO ASPECTS OF THE PROCESS MODEL FOR EFFECTIVE LEARNERSHIP IMPLEMENTATION

A process model for effective learnership implementation was developed by a process of synthesis from various Human Resources Development (HRD) models, both from South Africa and internationally.

A survey questionnaire was developed to establish the views of respondents as to their agreement and/or disagreement with the process model for effective learnership implementation. The closed-ended questions used in the structured interview were asked to force respondents to share their views on the model and to stimulate a discussion around the actions and tasks necessary to implement the learnership model.

Much qualitative information was gleamed from this process and assisted in confirming the results of the process learnership model. Qualitative information emerged from the unstructured interviewing process. Part of the structured interview process to elicit information that may warrant consideration as to the addition and/or removal of actions and/or tasks of the learnership model.

An examination of the quantitative results and qualitative information facilitated and gained from respondents, together with the independent variables to the learnership survey were considered. A decision of proposing no phase, action, or task changes, or elimination was made.
The reason for this was based on the high degree of agreement on the process model for effective learnership implementation.

The qualitative exploration confirmed this position. However, during the unstructured survey interview and facilitation there were additional recommendations to amend and alter the model.

What transpired was that organisations need to be sensitised and educated as to learnerships before considering more seriously its implementation. For this reason an additional phase was added to allow organisations to be sensitised and educated as to the impact of learnerships on their organisations. Organisations that are sensitised and buy-in to the broad approach have a higher degree of impact and success when implementing learnerships.

Organisations that make a decision not to engage the process further with regard to learnership implementation, therefore exit the process model. This sensitisation filter was added and incorporated into the process model for effective learnership implementation.

The organisational context and range of industry, was modified by combining the dimensions to stress their importance when replicating the outcomes of effective learnership implementation in differing contexts, and across diverse ranges of industry.

What further emerged was that learnerships cannot only be effective within a process approach, and should also take place within a positive ‘organisational learning culture’. This concurs with the conclusions and important findings of Chapter two (aspects of workplace learning), and Chapter four (a process model for effective learnership implementation). Hattingh and Smit (2004, p. 2), and Hattingh and van der Walt (2004, p. 6) concur with these insights and use the term ‘organisational learning
culture’. The authors further emphasise that a continual learning and organisational culture that promotes learning must be maintained. Learning (L) must be equal to, or greater than the environmental change (EC), or the organisation will not adapt and die. This concept is expressed as a mathematical equation; namely L > EC.

To account for, emphasise and promote a continual learning and organisational culture that promotes learning an additional element of ‘organisational learning culture’ was added to balance the ‘organisation management system’ sub-system. Both the sub-systems are needed for effective learnership outcomes. The reason why both were needed was because they balance organisational behaviourist management systems, versus organisational people learning systems.

It would appear that ‘organisational learning culture’ lies at the heart of the learnership process model, and assists with effective implementation. Due to this significant finding it was important to include this concept in the six-phase integrated learnership model.

6.7 THE SIX-PHASE INTEGRATED LEARNERSHIP MODEL

The objective of this study was to develop a learnership model which can assist organisations to accomplish learnership implementation more effectively. That objective has been met by following a three set process, namely:

a) Developing a process model for effective learnership implementation from a study of secondary sources used,
b) Establishing a sample of Training Managers, and Skills Development Facilitators (SDFs) from the Automobile and New Tyre chambers that form part of MERSETA. These respondents shared their views as to whether they agreed and/or disagreed
with a process model for the effective implementation of learnerships in South Africa. This was achieved by using a questionnaire as part of a structured interview component to gain quantitative data, and at the same time an unstructured interview component to acquire qualitative data, and
c) The results from this empirical survey were used to develop a 'six-phase integrated learnership model.

The extensive discussion of the 'quantitative analysis of Section C of the questionnaire sub-section' and 'review of qualitative analysis sub-section' has been incorporated into the process model for effective learnership implementation, which culminated in the six-phase integrated learnership model.

<table>
<thead>
<tr>
<th>Phases</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase 1</td>
<td>Conduct organisational skills planning</td>
</tr>
<tr>
<td>Phase 2</td>
<td>Establish learnership</td>
</tr>
<tr>
<td>Phase 3</td>
<td>Select and design learnership</td>
</tr>
<tr>
<td>Phase 4</td>
<td>Prepare to implement learnership</td>
</tr>
<tr>
<td>Phase 5</td>
<td>Implement learnership</td>
</tr>
<tr>
<td>Phase 6</td>
<td>Monitor, report and evaluate</td>
</tr>
<tr>
<td></td>
<td>Organisational management system, and organisational learning culture</td>
</tr>
<tr>
<td></td>
<td>Organisational context and range of industry</td>
</tr>
</tbody>
</table>

Table 6.23: Phases and actions required for the six-phase integrated learnership model.
Presented in Table 6.23 is the six-phase integrated learnership model reflecting the broad phases and actions required for successful learnership implementation. The phases and actions are indicated and show the sequence and order that should be considered in learnership programmes. Some phases and actions may be skipped as previous programmes may have layed a foundation and prepared the way for a more efficient path to implementing learnerships. All phases and actions should however be considered when applying the six-phase integrated learnership model to effectively implement learnerships.

A pictogram of the six-phase integrated learnership model is illustrated in figure 6.1. The figure shows the incorporation of the various recommendations by the majority of respondents to the research study. The various dimensions are indicted by the different colours. The first dimension is the organisational sensitisation which is a precursor to the more elaborate six-phase integrated learnership model indicated. The overarching dimension of the Organisational Management System, and Organisational Learning Culture indicted show the management dimension and values that must underpin and support learnership implementation. The six-phase integrated learnership model with the various dimension occur in an environment of appropriate organisational contexts and applicable range of industries.
Figure 6.1: A six-phase integrated learnership model.
<table>
<thead>
<tr>
<th>Conduct Organisational Skills Planning (Phase 1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>➢ Perform organisational skills analysis</td>
</tr>
<tr>
<td>➢ Integrate learnership into organisational Human Resources Development Strategy</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Establish Learnership (Phase 2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>➢ Confirm demand for a learnership</td>
</tr>
<tr>
<td>➢ Generate unit standards and qualifications for learnership</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Select and Design Learnership (Phase 3)</th>
</tr>
</thead>
<tbody>
<tr>
<td>➢ Select an appropriate learnership programme to meet organisational goals</td>
</tr>
<tr>
<td>➢ Develop an organisational workplace project proposal before implementation</td>
</tr>
<tr>
<td>➢ Design a learning programme outlining all learning requirements</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Prepare to Implement Learnership (Phase 4)</th>
</tr>
</thead>
<tbody>
<tr>
<td>➢ Establish a process and project steering committee to guide implementation</td>
</tr>
<tr>
<td>➢ Form implementation partnerships with providers</td>
</tr>
<tr>
<td>➢ Develop an organisational capacity for delivery of the learnership</td>
</tr>
<tr>
<td>➢ Obtain workplace provider accreditation</td>
</tr>
<tr>
<td>➢ Select and support learners</td>
</tr>
<tr>
<td>➢ Develop learning material from the detailed curriculum</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Implement Learnership (Phase 5)</th>
</tr>
</thead>
<tbody>
<tr>
<td>➢ Implement workplace learning</td>
</tr>
<tr>
<td>➢ Conduct formative and summative assessment</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Monitor, Report and Evaluate (Phase 6)</th>
</tr>
</thead>
<tbody>
<tr>
<td>➢ Prepare reports for organisation and SETA</td>
</tr>
<tr>
<td>➢ Determine the cost effectiveness and impact of the learnership</td>
</tr>
<tr>
<td>➢ Update organisational Quality Management System based on improvements identified</td>
</tr>
</tbody>
</table>

Table 6.24: Phases, actions, and tasks to be considered in the six-phase integrated learnership model.
Prepare to Implement Learnership: phase 4

- Establish a process and project steering committee to guide implementation
  - Establish a learnership management team
  - Develop a Quality Management System including business plan and budget
  - Appoint a project manager to drive the process
  - Schedule regular meetings to ensure communication
- Form implementation partnerships with providers
  - Conduct a workshop with employers and providers to develop a broad curriculum and learning programme
  - Select and form partnerships with leading providers
  - Decide on learning activity distribution
- Develop organisational capacity for delivery of the learnership
  - Conduct a workshop with employer and providers to prepare for accreditation
  - Set up an implementation team at workplace and provider
  - Identify, train and register assessors
  - Provide training to workplace trainers and mentor (facilitators)
  - Identify staff required for administration
  - Identify and obtain any additional equipment and/or other physical resources needed
  - Orientate existing workforce
- Obtain workplace provider accreditation
  - Develop a vision and mission statement regarding the training function
  - Obtain and complete an accreditation application form
  - Develop and document clear policies and/or procedures in accordance with ETQA requirements
Select and support learners

- Develop learner selection policy, procedures and processes
- Identify, select and prepare learners
- RPL learners
- Develop individual learning programmes
- Plan rotation between institutional and workplace learning for each learner
- Orientate learners
- Sign learnership agreements

Develop learning material from the detailed curriculum

- Develop a detailed curriculum
- Select/develop learning material

Table 6.25: Actions and tasks summary for the ‘prepare to implement learnership’ phase 4.

Reflected in Table 6.24 are the phases, actions and tasks to be considered when implementing the six-phase integrated learnership model. Table 6.25 outlines the actions and tasks to be taken into account when developing ‘phase 4: prepare to implement learnership. The above tables and figure can aid organisations to project manage the six-phase integrated learnership model.

6.8 CONCLUSION

The purpose of Chapter six was to analyse and interpret the data obtained from the empirical study. Chapter six determined the results of the quantitative results and qualitative information, and was used to identify dependent variables relating to the process model for effective learnership implementation.
The results obtained from the empirical study indicted a high degree of agreement with the process model for effective learnership implementation. The results from the empirical survey, together with the results obtained during the literature reviews in Chapters two, three, and four were incorporated into a six-phase integrated learnership model. The new six-phase integrated learnership model resolved the third sub-problem of the study, namely;

**SUB-PROBLEM THREE**

To what extent do the methods used by organisations within the MERSETA chambers differ from those suggested in the literature?

The final Chapter presents a summary of significant findings, and conclusions and recommendations pertaining to the research are offered.
CHAPTER 7

SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

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7.2 PROBLEMS AND LIMITATIONS 205

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7.4 RECOMMENDATIONS 209

7.5 CONCLUSION 211
CHAPTER 7

SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

7.1 INTRODUCTION

The final Chapter provides an opportunity for reflecting, and summing up the outcomes of the research project. In this Chapter the main findings are summarised in relation to the main and sub-problems.

The problems and limitations encountered in conducting the study are described, and recommendations for future research proposed, with final conclusions.

7.2 PROBLEMS AND LIMITATIONS

No major problems were encountered in conducting this study. Initially during the course of 2001 when this study was started, there was not sufficient literature available on learnerships. However, due to extensive literature searches, adequate international literature was gathered. In time ample local literature became available, together with various learnership pilot projects emerging with reports of the ‘lessons learned’ from the implementation of these learnership projects.

Currently there is a wealth of journals, articles, magazines and non-print media relating to learnerships, however only on a superficial level of complexity. A minor problem encountered was the lack of response from a few of the respondents of the population. Follow-up phone calls and electronic mails was utilised to encourage and set up structured interviews with respondents from the chamber organisations.
A limitation of the research study was that the data collected was limited to certain chambers of the Manufacturing Engineering and Related Services Education and Training Authority (MERSETA), namely the Automobile and New Tyre chambers. The reason for selecting these chambers over the other chambers was due to the fact that the surveyed chambers have a similar profile, i.e. unit of analyses. Referring to the other three chambers, namely the metal and engineering, plastics, motor retail chambers, there were various different unit of analyses totals, and with many strata within these chambers, or which not much information was readily available..

The strata relate to different types of business processes utilised across the chamber, and within actual organisations. Further differences relate to organisational size, headcount, and experience with regard to implementing learnerships.

The different strata would have to be identified and each stratum surveyed to assure the validity and reliability of the research findings. Information as to the profile of each stratum was not readily available and would have prolonged the research project excessively. Thus, the researcher postulates that should the other three chambers of the MERSETA be surveyed, it may produce different research results.

7.3 SUMMARY OF THE STUDY

The main problem identified in this study was:

How successful are the methods used by organisations within the MERSETA chambers to develop, implement and maintain learnerships?
The study was prompted by the fact that there are many challenges to Sector Education and Training Authorities (SETAs), and organisations when implementing learnerships so as to add value; however, there are not many guidelines currently available to aid this process since “The learnership models are in people’s heads at this stage” (J Kromberg, learnership Manager, MERSETA, personal communication, 23 November 2001).

In order to solve the main problems, sub-problems were developed and addressed in Chapter one of this study. The sub-problems are listed, together with a brief discussion on each sub-problem.

**SUB-PROBLEM ONE**

What methods are required for organisations to develop, implement and maintain learnerships that are revealed in literature?

**SUB-PROBLEM TWO**

What methods are organisations within the MERSETA chambers utilising to develop, implement and maintain learnerships?

**SUB-PROBLEM THREE**

To what extent do the methods used by organisations within the MERSETA chambers differ from those suggested in the literature?

A literature examination to determine the aspects of workplace learning was conducted (Chapter two). The aspects of workplace learning were explored, including the various perspectives of learning, together with an investigation into workplace learning. Chapter three discussed
apprenticeships, traineeships, learnerships, vocational education and training standards, and competence.

Chapter four presented a process model for effective learnership implementation that was based on international approaches together with South African models and current practices.

A survey questionnaire was then developed to establish the extent to which organisations agree or disagree with the learnership process model developed in Chapter four. Structured interviews were conducted using the survey questionnaire which was designed to elicit responses to questions that could be statistically analysed to determine the extent to which respondents concur with the learnership process model.

The structured interview was moved from closed questions to asking more open and in-depth questions. This allowed the structured interview to become more unstructured in nature. This was necessary to draw out the qualitative data required to focus on the ‘first hand experience’ of the individual organisational experiences.

The results obtained from the empirical study indicated a high degree of agreement with the process model for effective learnership implementation. The results obtained from the quantitative data, and qualitative data were used to adapt the learnership process model, and align it with the views of the majority of respondents. The information was included and the learnership process model was enhanced to produce a six-phase integrated learnership model.

In summary therefore, it is clear that the main problem and sub-problems were solved by conducting the comprehensive literature study and developing a learnership model. Further, the results from the empirical survey substantiated the learnership model developed.
7.4 RECOMMENDATIONS

Recommendations for the application of this research project’s finding are proposed, and suggestions for appropriate further study in areas related to the research problem are offered.

The objective of this study was to develop a learnership model which can assist organisations to implement learnership training more effectively. This has been achieved as a model was proposed and authenticated by industry. Furthermore, a project management template has been supplied to assist in the management of learnerships in an organisation.

The researcher believes that the following recommendations should be implemented by MERSETA in order for learnerships to be introduced to organisations.

1. Firstly, MERSETA should approach organisations and sensitise senior management as to the availability of the six-phase integrated learnership model. Additionally, senior management should establish whether the organisational culture is conducive to the implementation of the six-phase integrated learnership model.

2. Secondly, the individual and divisions tasked with implementing learnerships should ensure that the six-phase integrated learnership model fits into the wider organisational sub-culture. Should the six-phase integrated learnership model be implemented in isolation, it could lead to indifferent learning results.

3. Thirdly, educational training and development institutions, such as Universities, Technikons, and public and private training providers should be approached by MERSETA to assist organisations with the introduction of learnerships. This would greatly assist organisations as these educational training and development
institutions would have the capacity and capability to provide advice and further guidelines as to learnership qualification training.

Finally, since it is the nature of research to always give rise to further unanswered questions it is necessary to make recommendations for future research. Further investigation in the following areas is recommended:

- As the research study was limited to the Automobile and New Tyre chambers of the MERSETA, the various other chambers of the MERSETA could be surveyed and their results compared to the current research undertaking,
- The research study could be expanded to various other industries and sectors to ascertain whether there is portability of the six-phase integrated learnership model across the economic sector,
- As learnerships are platforms to the effective implementation of the Skills Development Act No. 95 of 1998, a research study could be undertaken to establish which the most popular and/or appropriate vehicles being used by organisations to give effect to the Skills Development Legislation are.

7.5 CONCLUSION

The Skills Development Act No. 97 of 1998 specifies the implementation of learnerships as one of the SETAs deliverables. With the Government focusing on delivery, Sector and Education and Training Authorities can use the six-phase integrated model as a guide to influence their legislated performance objectives. As the implementation of learnerships is conducted by organisations, SETAs could use the six-phase integrated learnership model to capacitate organisations as to the benefits and processes that learnership qualification training requires.
The organisations and SETAs would then be contributing to the National Skills Development Strategy of 2001, which aims to improve the workplace skills of South Africans. These results would then ultimately develop the human resources of South Africa, and impact on the Human Resources Development Strategy (Coetzee, 2004a, p. 1).

There would thus be a sound confidence level when implementing learnerships, as the six-phase integrated learnership model has been comprehensively developed and surveyed by organisations that are currently implementing learnerships on a large scale. The confidence level to use the six-phase integrated learnership model would be high, as there was a high degree of agreement with the learnership model that was developed as part of this research study.
REFERENCES


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Pandy, A. (2003). *Leadership development workshop*. Learning conducted at Delta Motor Corporation in Port Elizabeth, on the 7th of March 2003 by the Group Training Manager from the Learning and Development Institute (LDI), BevServ HR.


30\textsuperscript{th} May 2004

Dear colleague,

**Organisational Learnership Survey**

You're invited to participate in a survey aimed at establishing your views of a process model for the effective implementation of learnerships in South Africa.

Your assistance in completing and returning the attached questionnaire would be greatly appreciated and should take no more than **15 minutes**. Please rest assured that your anonymity will be protected, and all data will be treated as confidential.

Please complete the **quantitative** section by filling in a cross (X), and the **qualitative** section by inserting your views. Should you require further clarity or need more information please contact the researcher at 041 - 368 5236, or 083 565 5321.

It would be appreciated if you complete the questionnaire electronically and return it by e-mail to brian.hamlet@absamail.co.za before the 15\textsuperscript{th} June 2004. If you wish to receive a summary of the results from the survey please indicate this at the end of the questionnaire (summary planned for end July 2004). Thank you for your collaboration.

Yours sincerely,
Brian Hamlet
Researcher

Prof. Dave Berry (Promoter)
Head of Department: Human Resources Management
Research title: The development of a model for establishing, implementing, and maintaining learnerships in South Africa.

The researcher has developed a learnership process model, which can assist organisations to accomplish learnership implementation effectively. The questionnaire is designed to test the degree to which you agree that the process model can assist your organisation in implementing learnerships.

**Organisation Context**

A process model for effective learnership implementation.
Section: A Biographical detail

Please supply the following information regarding your organisation by completing the appropriate information, or indicating a cross (X) in the appropriate box.

A.1  Approximately how many employees does your organisation employ?

A.2  In which province and region does your organisation predominantly operate?

Province  
Region or Area  

A.3  To which chamber of the MERSETA does your organisation belong?

- Auto
- Metal & Engineering
- Motor
- New Tyres
- Plastics

A.4  What position do you currently hold?

- Skills Development Facilitator
- Human Resources Manager
- Human Resources Officer
- Training Manager
- Training Officer
- Other (please specify)  

A.5  What is your length of service in your current position?

- 0 - 5 years
- 6 - 10 years
- 11 - 15 years
- More than 15 years

A.6  What is your highest qualification?

A.7  Have you attended a workshop on learnerships in the past two years?

- Yes
- No
Section B: Use of learnership programmes

B.1 What is the status of your company with regard to learnership implementation?

<table>
<thead>
<tr>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not planning to implement at this stage</td>
</tr>
<tr>
<td>Planning to implement shortly</td>
</tr>
<tr>
<td>Implementation in process</td>
</tr>
<tr>
<td>Re-implementing the same and/or different</td>
</tr>
<tr>
<td>learnership/s</td>
</tr>
</tbody>
</table>

B.2 Does your organisation currently use formal learnership programmes as strategy to enhance employee development as part of the Skill Development Act?

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
</table>

If Yes, proceed to Section C If no, complete questions B3, and then proceed to Section C

B.3 Reasons for not utilising formal learnership programmes.

Please indicate the degree to which you agree with the following reasons why your organisation does not utilise formal learnership programmes.

<table>
<thead>
<tr>
<th>Reasons for not utilising formal learnership programmes</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>A Lack of an organisational need</td>
<td></td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>B Learnerships are too costly to implement</td>
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<td></td>
<td></td>
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<tr>
<td>C Insufficient legislative grants and incentives for</td>
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<tr>
<td>learnership implementation</td>
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<tr>
<td>D Lack of know how on how to implement learnerships</td>
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<tr>
<td>E Line management not prepared to commit time/resources</td>
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<tr>
<td>F Organisational culture and/or climate is not</td>
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<tr>
<td>conducive to learnership implementation</td>
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<tr>
<td>G Previous attempts to execute learnerships were</td>
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<td></td>
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<tr>
<td>unsuccessful</td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>H Insufficient impact of learnerships on organisational</td>
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</tr>
<tr>
<td>goals</td>
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<tr>
<td>I Increased industrial relation issues related to</td>
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<tr>
<td>learnership implementation</td>
<td></td>
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<tr>
<td>J Party's roles, responsibilities and accountabilities</td>
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<td>regarding learnerships are not clear</td>
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<td>K Management and/or organisation believe that</td>
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<tr>
<td>requisite skills will develop naturally</td>
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<tr>
<td>L Other (please specify): ................................</td>
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</tr>
</tbody>
</table>
Section C: A Process Model for Effective Learnership Implementation

Conduct organisational skills planning: Phase 1

Please indicate the degree to which you agree/disagree with the following actions relating to the conducting of organisational skills planning?

<table>
<thead>
<tr>
<th>Actions for conducting organisational skills planning</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1 Perform an organisational skills analysis</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.2 Integrate learnerships into organisational Human Resources Development Strategy</td>
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<tr>
<td>1.3 Other (please specify):..........................................................</td>
<td></td>
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</tr>
</tbody>
</table>

Establish learnership: Phase 2

Please indicate the degree to which you agree/disagree with the following actions relating to the establishing of learnerships?

<table>
<thead>
<tr>
<th>Actions for establishing a learnership</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1 Confirm demand for a learnership</td>
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<tr>
<td>2.2 Generate unit standards and qualifications for learnership</td>
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<td>2.3 Other (please specify):..................</td>
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</tbody>
</table>
Select and design learnership: Phase 3

Please indicate the degree to which you agree/disagree with the following actions relating to the selecting and design of learnerships?

<table>
<thead>
<tr>
<th>Actions for selecting and designing a learnership</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.1 Select a learnership as an appropriate programme to meet organisational goals</td>
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<tr>
<td>3.2 Develop an organisational workplace project proposal before implementation</td>
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<tr>
<td>3.3 Design a learning programme outlining all learning requirements</td>
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<td>3.4 Other (please specify):</td>
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</tbody>
</table>

Prepare to implement learnership: Phase 4

Please indicate the degree to which you agree/disagree with the following actions relating to the preparing to implement learnerships?

<table>
<thead>
<tr>
<th>Actions for preparing to implement a learnership</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.1 Establish a process, and project steering committee to guide implementation</td>
<td></td>
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<tr>
<td>4.2 Form implementation partnerships with providers</td>
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<tr>
<td>4.3 Develop organisational capacity for delivery of the learnership</td>
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<tr>
<td>4.4 Obtain workplace provider accreditation</td>
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<tr>
<td>4.5 Select and support learners</td>
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<tr>
<td>4.6 Develop learning material from the detailed curriculum</td>
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<td>4.7 Other (please specify):</td>
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</tbody>
</table>


### Prepare to implement learnership: Phase 4 (actions and tasks)

Please indicate the degree to which you agree/disagree with the following tasks required for preparing to implement learnerships?

<table>
<thead>
<tr>
<th>Tasks for &quot;Preparing to implement a learnership&quot;</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.8 Establish a process, and project steering committee to guide implementation by: Establishing a learnership management team</td>
<td></td>
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<tr>
<td>4.9 Developing a quality management system including business plan and budget</td>
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<tr>
<td>4.10 Appointing a project manager to drive the process</td>
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<td>4.11 Scheduling regular meetings to ensure communication</td>
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<tr>
<td>4.12 Form implementation partnerships with providers by: Conducting a workshop with employers and providers to develop a broad curriculum and learning programme</td>
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<tr>
<td>4.13 Selecting and form partnerships with leading providers</td>
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<tr>
<td>4.14 Deciding on learning activity distribution</td>
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<tr>
<td>4.15 Develop organisational capacity for delivery of the learnership by: Conducting a workshop with employer and providers to prepare for accreditation</td>
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<tr>
<td>4.16 Setting up an implementation team at workplace and provider</td>
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<tr>
<td>4.17 Identifying, train and register assessors</td>
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<tr>
<td>4.18 Providing training to workplace trainers and mentor (facilitators)</td>
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<tr>
<td>4.19 Identifying staff required for administration</td>
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<td>4.20 Identifying and obtain any additional equipment and/or other physical resources needed</td>
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<tr>
<td>4.21 Orientating existing workforce</td>
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<tr>
<td>4.22 Obtain workplace provider accreditation by: Developing a vision and mission statement regarding the training function</td>
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<tr>
<td>4.23 Obtaining and complete an accreditation application form</td>
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<tr>
<td>4.24 Developing and document clear policies and/or procedures in accordance with ETQA requirements</td>
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</tbody>
</table>
### Tasks for "Preparing to implement a learnership" [continued]

<table>
<thead>
<tr>
<th></th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.25</td>
<td><strong>Select and support learners by:</strong></td>
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<tr>
<td></td>
<td>Developing learner selection policy, procedures and processes</td>
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<tr>
<td>4.26</td>
<td>Identifying, select and prepare learners</td>
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<tr>
<td>4.27</td>
<td>Recognising Prior Learning of learners</td>
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<tr>
<td>4.28</td>
<td>Developing individual learning programmes</td>
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<tr>
<td>4.29</td>
<td>Planning rotation between institutional and workplace learning for each learner</td>
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<tr>
<td>4.30</td>
<td>Orientating learners</td>
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<tr>
<td>4.31</td>
<td>Signing learnership agreements</td>
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<tr>
<td>4.32</td>
<td><strong>Develop learning material from the detailed curriculum by:</strong></td>
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</tr>
<tr>
<td></td>
<td>Developing a detailed curriculum</td>
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<tr>
<td>4.33</td>
<td>Selecting and developing learning material</td>
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<tr>
<td>4.34</td>
<td>Other (please specify):………………………………………</td>
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<td>……………………………………………………………..</td>
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</tbody>
</table>

### Implement learnership: Phase 5

Please indicate the degree to which you agree/disagree with the following actions relating to the implementation of learnerships?

<table>
<thead>
<tr>
<th>Actions for implementing a learnership</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.1</td>
<td>Implement workplace learning</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>5.2</td>
<td>Conduct formative assessment (Refers to assessment that takes place during the process of learning)</td>
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<tr>
<td>5.3</td>
<td>Conduct summative assessment (Refers to assessment for making a judgement about achievement and is carried out when a learner is ready to be assessed at the end of a programme of learning)</td>
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<tr>
<td>5.4</td>
<td>Other (please specify):………………………………………</td>
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<td></td>
<td>……………………………………………………………..</td>
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</tbody>
</table>
Monitor, report and evaluate: Phase 6

Please indicate the degree to which you agree/disagree with the following actions relating to the monitoring, reporting and evaluating learnerships?

<table>
<thead>
<tr>
<th>Actions for monitoring, reporting and evaluating</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.1 Prepare reports for organisation and MERSETA</td>
<td></td>
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</tr>
<tr>
<td>6.2 Determine the cost effectiveness and impact of the learnership</td>
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<tr>
<td>6.3 Update organisational Quality Management System based on improvements identified</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>6.4 Other (please specify):</td>
<td></td>
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</tbody>
</table>
<pre><code>                                                                                                              |                |       |           |          |                   |
</code></pre>

Respondents additional comments and input requested on learnership model:

........................................................................................................................................................................
........................................................................................................................................................................

If you wish to receive a summary of the results from the survey please confirm your contact Details:

Name: ........................................................................

Position: .................................................................

Address: ........................................................................

Tel: ..............................................................................

Fax: ..............................................................................

Cell: ..............................................................................

E-mail: ...........................................................................

Thank you for your kind co-operation. Please return the questionnaire to the researcher.
1st July 2004

Dear colleague,

Organisational Learnership Survey

You’re invited to participate in a survey aimed at establishing your views of a process model for the effective implementation of learnerships in South Africa. Your input would be of significant value in the extension of learnership knowledge.

Your assistance in completing and returning the attached questionnaire would be greatly appreciated and should take no more than 15 minutes. Please rest assured that your anonymity will be protected, and all data will be treated as confidential.

Please complete the quantitative section by filling in a cross (X), and the qualitative section by inserting your views. Should you require further clarity or need more information please contact the researcher at 041 - 368 5236, or 083 565 5321.

It would be appreciated if you complete the questionnaire electronically and return it by e-mail to brian.hamlet@absamail.co.za before the 15th July 2004. If you wish to receive a summary of the results from the survey please indicate this at the end of the questionnaire (summary planned for end August 2004). Thank you for your collaboration.

Yours sincerely,
Brian Hamlet
Researcher

Prof. Dave Berry (Promoter)
Head of Department: Human Resources Management