

STUDY UNIT 1 – THE ROLE & IMPORTANCE OF HRD IN THE ORGANISATION

1. Reflect on your own life and write a few thoughts on how the changes described above apply to the world in which you function.
 - 1.1. *Individuals are all different. Their background, culture and current surroundings all contribute to who they are and how they respond to the changes they encounter in their lives. You may find that you are very dependent on technology and the internet. There may be political changes or even uprisings in your local community. Perhaps you are currently looking for a job and are getting first-hand exposure to the legal rules governing the South African workplace. Wherever you find yourself, you probably realise that change is necessary for growth and that your response to that change will determine the effectiveness of your growth as a person and an employee.*
2. After considering the above information, would you say it is necessary for a business organisation to be able to adapt to change and to maintain a competitive advantage? Give reasons for your answer.
 - 2.1. *In the world of business, it is all about meeting the needs of your customers. These needs can (and do) change on a daily basis and, in order to keep up, organisations need to increase their organisational responsiveness. By introducing flexible ways to conduct business, organisations can overcome their uncertainty about being able to deal effectively with change. Besides profit gains, they will also enhance their productivity, innovation, performance and market share.*
3. Reflect on the following statement and indicate whether it is true or false. Discuss this statement with a friend, colleague or family member: For the organisation to be dynamic, growth-oriented and fast-changing, it should develop its HR.
 - 3.1. *This statement is true. Although positive personnel policies and programmes motivate the employees and buy their commitment and loyalty, these efforts cannot keep the organisation dynamic. For an organisation to be dynamic, it should have dynamic human resources. For human resources to be dynamic, they must acquire capabilities continuously and adopt values and beliefs in accordance with the changing requirements of the organisation. Similarly, when employees use their initiative, take risks, experiment, innovate and make things happen, the organisation may be said to have an enabling culture. Competent human resources can be dynamic in an enabling culture. Thus the organisation can develop, change and excel only if it has developed human resources. Therefore, HRD plays a significant role in making the human resources healthy, useful and purposeful.*
4. Read up on or speak to your friends, family or colleagues about the term “business organisation”. Then describe this term in your own words.
 - 4.1. *Owing to the many different types of organisations that exist, there are many definitions of this term/concept. However, the following are the most important aspects that you need to include in your definition:*
 - *people (two or more)*
 - *making a conscious effort to coordinate tasks and functions*
 - *to achieve a common goal (or a set of common goals)*
5. Training and development initiatives not only have to adhere to legislative guidelines, but also have to be reinvented quite often. Reflect on why continuous improvement is necessary and what managers can do to ensure continuous improvement.
 - 5.1. *The training cycle is focused on the continuous improvement of learning programmes and employees’ performance in the workplace. Because employees need to improve their performance on a continuous basis, it is important for managers to give them the opportunity to do so. Providing a once-off training opportunity will not be sufficient and could be a very costly mistake. As long as employees are learning, the organisation can maintain a competitive advantage. The training cycle provides for continuous improvement through the assessment and evaluation of programme effectiveness. It identifies further training needs and current deficiencies of the programmes used to address the training gap. It is therefore necessary to apply the steps of the training cycle on a regular basis.*

6. Summary

6.1. What is the difference between principal and supplementary activities in human resource management?

6.1.1. *The principal activities entail human resource planning, employment equity, recruitment and selection, compensation and benefits, employee relations, employee health and safety and human resource development (HRD), which includes all training and development activities. The supplementary activities include organisation and job design, performance appraisal and management, and human resource information systems.*

6.2. What is the main purpose of HRD?

6.2.1. *The main purpose of HRD is to facilitate optimal employee performance by creating and making available training and development (T&D) and learning experiences to the employees in the workplace.*

6.3. Name the activities involved in HRD.

6.3.1. *Activities involved in HRD include the following:*

- *training*
- *development*
- *employee orientations*
- *skills and technical training*
- *management development programme*
- *organisational learning and development*
- *career development*

STUDY UNIT 2: HUMAN RESOURCE DEVELOPMENT FUNCTIONS IN THE ORGANISATION

1. As the manager of your local football club, you have to strategise, organise, lead, assure quality and evaluate the activities of the club for the next football season. Write down which activities you think you have to carry out under each of the following management functions: Strategising; Organising; Leading; Assuring Quality; Evaluating.

- *We are sure you came up with a number of ideas for each of these functions. The following are just a few examples of what you could have listed:*
- **Strategising**: *strategise the activities for the season by drawing up a fixtures list; budget for the activities of the club.*
- **Organising**: *organise the various matches; assign responsibilities to the various members of the club management.*
- **Leading**: *motivate the players and management committee members; direct the activities of the club.*
- **Assuring quality**: *ensure that quality management policies and procedures are applied.*
- **Evaluating**: *control the expenditure of the club; control the management committee meetings.*

2. Approach the training manager of your company or any organisation you are familiar with and ask them the following questions. Make notes about their responses to each question:

- What is the value proposition of the HRD department?
- What strategising activities are conducted in respect of T&D in the organisation?
- What organising activities are conducted in respect of T&D in the organisation?
- What leading activities are conducted in respect of T&D in the organisation?
- What quality assurance activities are conducted in respect of T&D in the organisation?
- What evaluation activities are conducted in respect of T&D in the organisation?

After your discussion with the HRD manager, draw up a list of the activities and classify them under the headings: value proposition, strategising, organising, leading, assuring quality and evaluating. Do you think the list is complete? What do you think should be added? Reflect on this and add those points that may have been omitted by the T&D manager.

2.1. You may have obtained a variety of inputs from the organisation you consulted. The following is an example of what you may have been able to clarify under the management functions in respect of T&D in organisations:

Management Function	Related T&D Activity
<i>Defining the T&D value proposition (Management determines the REQUIREMENTS of the key stakeholders.)</i>	<ul style="list-style-type: none"> • Identify the main stakeholders. • Determine the goals and values of the stakeholders. • Clarify what is important to them. • Specify the requirements.
<i>Strategising (Management decides WHAT needs to be done.)</i>	<ul style="list-style-type: none"> • Determine the T&D needs. • Analyse tasks. • Analyse learning outcome. • Draw up a strategic plan for HRD. • Draw up an annual schedule of courses. • Plan learning intervention. • Plan budgetary requirements.
<i>Organising (Management decides HOW it should be done.)</i>	<ul style="list-style-type: none"> • Organise the HRD department. • Allocate responsibilities. • Select methods. • Select training methods. • Select media • Select training staff and trainers. • Arrange accommodation. • Make administrative arrangements.
<i>Leading (Management says HOW and WHEN it should be done.)</i>	<ul style="list-style-type: none"> • Motivate staff and students. • Provide direction and guidelines. • Provide support.
<i>Assuring quality (Management ensures that all T&D practices comply with the national quality outcomes-based /workbased T&D requirements.)</i>	<ul style="list-style-type: none"> • Establish quality management system. • Draft policies and procedures. • Train and educate HRD and T&D staff • Ensure that HRD and T&D staff are trained.
<i>Evaluating (Management determines whether HRD and T&D practices comply with standards and whether T&D interventions added value for stakeholders.)</i>	<ul style="list-style-type: none"> • Measure results. • Assess learning. • Assess success of training. • Determine what changes are required.

3. **Summary**

3.1. Name the six management functions of HRD.

3.1.1. HRD management functions include the following:

- Defining the T&D value proposition
- Strategising
- Organising
- Leading
- Assuring Quality
- Evaluating

3.2. Discuss the five phases of the training cycle.

3.2.1. The training cycle is the iterative (repeating), scientific and systematic process of determining learners' training needs; designing learning and skills programmes and materials; delivery training; assessing and moderating learners' achievements; and evaluating the effectiveness of learning or skills programmes for continuous improvement initiatives.

STUDY UNIT 3: HUMAN RESOURCE DEVELOPMENT PROFESSIONAL ROLES

1. List the most important characteristics of T&D professionals.

1.1. T & D professionals are:

- *results-driven*
- *investigative*
- *able to set and comply with quality standards*
- *cooperative and collaborative*
- *willing and able to add value for stakeholders*
- *flexible, while maintaining important principles*
- *responsible for their own continuous professional development*
- *ethical and responsible in their service to the profession and clients*

2. Describe the role of the T&D professional as a leader, administrator and manager.

2.1. T & D professions fulfilled these roles by:

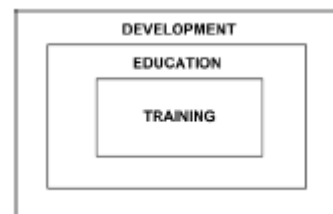
- *making decisions appropriate to the level*
- *managing learning*
- *carrying out administrative duties efficiently*
- *participating in workplace learning and development decision-making structures*
- *supporting learners and colleagues*
- *demonstrating responsiveness to changing circumstances, needs and stakeholder expectations*

STUDY UNIT 4: IMPORTANT CONCEPTS RELATED TO THE PSYCHOLOGY OF LEARNING

1. Reflection on what you know about HRD so far.
 - 1.1. *HRD consists of education, training and development and is defined as organised learning experiences provided by employers within a specified period of time to bring about the possibility of performance improvement, personal growth and enhancement of employees' employability orientation, to satisfy the current and future needs of the organisation.*
2. Explain the concepts you have just studied to a new employee in the HRD department of your organisation. For each of these concepts, write a short description and give an example. Use your own words. (Competencies, Attitudes & Beliefs, Knowledge, Skills)
 - 2.1. **Competencies** are specific behaviours that learners use to demonstrate the achievement of satisfactory performance. Competencies consist of attitudes and beliefs, knowledge and skills. For example, oral and written communication skills in English are a specific competence you should have in order to study this module. In the business environment, competence in reading, writing and speaking English is a requirement.
 - 2.2. **Attitudes** are the affective outcomes of learning experiences. Attitudes describe how learners feel about a certain situation, object or other people. For example, you may either really dislike studying this module or you may really enjoy studying it. Employees may feel that the orientation programme they had to attend after their appointment was fruitful and provided them with necessary information, or they may feel that it was a waste of time.
 - 2.3. **Knowledge** is the cognitive outcome of a learning experience. It describes how each learner processes information and attaches sense and meaning to it. Knowledge can be explicit or tacit. Make sure that you can differentiate between the two types of knowledge. It is important that you strive to achieve tacit knowledge in your learning experiences and programmes. The information you acquire in this module is the knowledge you need to be able to pass the module.
 - 2.4. **Skills** are the application of competencies to a specific task or situation. Being able to write a business report, use a computer effectively, drive a car or cook a nutritious meal are all skills.
3. Think about learning to use a computer and your experiences during the learning phase. Reflect on how learning to use a computer relates to the concepts you have just learnt. Now write down your experiences of learning to use a computer and how they relate to the concepts we have discussed.
 - 3.1. *Learning to use a computer involves being confronted with the technology and overcoming certain preconceived ideas (assumptions) about what the technology can do and your ability as a learner to master the complexity of the technology (changing attitudes). For example, some people are afraid of computers because they believe that doing something wrong might cause the computer to explode or their data to be lost. For others who are comfortable with the technology, there may be other preconceived ideas or expectations. For example, I enjoy the fact that computers make my job easier, but I also tend to regard them as unpredictable. I may switch my computer off in the evening with everything working well, only to find that something (usually the printer) doesn't work when I switch it back on again in the morning. I then wonder what could have changed overnight to cause this. I, therefore, have to work on changing my belief (attitude) that computers are fairly unreliable, which they clearly are not! In the process of learning how to use a computer, we are exposed to bits of knowledge, for example how to log on to a network, how to use an e-mail program and how to create a document and store it. Some of this knowledge is explicit (when you log on to a network, you have to use your username and password), and some of it should or could be tacit (you have to use your username and password so that the network knows who you are and can retrieve any of your own data that you stored on the network). After the attitude change (no longer being afraid of computers, or not being afraid that if you do something wrong the computer will explode) and the acquisition of knowledge, we acquired the skills to work on the computer – such as switching it on without being afraid, logging on to the network, creating and storing a document, and printing. Once all four of these skills had been achieved, we reached a certain level of competence – we can now work productively on the computer without making too many mistakes. This means that we experienced a change in competencies through the learning experiences provided, in other words, we were trained. Can you see that you have to acquire knowledge before you can acquire skills?*

4. Differentiate between training, education and development, and indicate how they relate to one another.

4.1. *Training is about changing or acquiring competencies required for a specific job, while education is about changing competencies, social skills and intellectual capacity; in other words, education is a broader concept. Development is an even broader concept, aimed at long-term change and development of potential. Learners are exposed to experiences where they can gain new insights into themselves and their organisation. Can you see that each of these concepts is broader than the previous one? In terms of the business environment, training can be described as all the knowledge and skills you acquire to prepare you for a specific job. That means that the content of what you are currently studying can be considered as training. So then why do we refer to it as tertiary education? Because we are not only equipping you with the knowledge and skills to perform a specific job, but also to function effectively in the business environment, we require you to become familiar with using a computer, because in the business environment you will be working on a computer often, if not daily. So, we are not only teaching the content of a few modules, but also preparing you for the business environment. When you start working and are identified to participate in a management development or mentorship opportunity, you will be moving on to development, which is preparation for future positions.*



5. Think of examples of at least three qualifications where the above three components already exist. Explain how these qualifications include all three components.

5.1. *Three qualifications that already contain a knowledge, practical and work experience component:*

- 5.1.1. **Nursing** – Nurses have to master certain theoretical principles. These are practised in laboratory or group sessions before the nurses gain work experience in hospital wards.
- 5.1.2. **Chartered accountants** – This qualification contains a huge section of knowledge and theory, including practical exercises in certain accounting practices. The learners have to complete an article period and pass the board examination before they can be called chartered accountants.
- 5.1.3. **Apprenticeships** – (e.g. diesel mechanics, electricians, boilermakers) Apprentices complete certain sections of the knowledge component of their qualification, then do specific practical exercises and, finally, gain work experience before progressing to another section of the knowledge component and repeating the whole learning cycle for that specific knowledge component. This process is repeated for all knowledge components until completion of the entire qualification. Other qualifications that consist of both a theoretical and a practical component are those for medical doctors and teachers.

6. **Summary**

6.1. Daniel is currently working as an HR practitioner for a manufacturing company. He has been registered as a student for a diploma in human resource management since 2009. He has been identified as a staff member with the potential to become a human resource development manager. Yesterday he received an email from his mentor, recommending that he attend a skills development facilitation course.

6.1.1. Identify the training that Daniel will attend.

- Skills Development Facilitation Course

6.1.2. Identify the education in the scenario.

- Diploma in Human Resource Management

6.1.3. Identify the development component in the scenario

- He has been identified as a staff member with the potential to become a human resource development manager.

6.1.4. Define each of the following concepts: training; education; development.

- **Training** is the transfer of specific skills to an employee and forms the foundation of learning programmes; it involves a short-term change effort.
- **Education** entails providing the knowledge, skills, moral values and understanding in the normal course of life; it is a medium-term change effort.
- **Development** involves a long-term change effort and it is intended to broaden individuals through experience and to give them new insights into themselves and their organisation.

6.1.5. How do these concepts differ?

6.1.5.1. Training:

- It is a specific way to facilitate learning in an organisation.
- It is regarded as a planned, short-term change effort to modify competencies, attitudes and beliefs, knowledge or skills behaviour through learning experiences.
- The goal is to sustain employees' employability by helping them to achieve effective performance in an activity or range of activities.

6.1.5.2. Education:

- This is a medium-term change effort intended to prepare individuals for promotions or for enhanced technical abilities in their current jobs.
- Education is broader in scope than training.
- It aims to develop individuals' knowledge, social understanding and skill, and intellectual capacity.

6.1.5.3. Development:

- This is a long-term change effort intended to broaden individuals through experience and to give them new insights into themselves and their organisation.
- Development focuses on the long-term growth and development of individuals in a way that fulfils their potential.

ETD efforts should be designed and delivered in a manner that encourages individuals to use and apply their innate talents.

6.1.6. Explain the competencies developed in applied competence and applied occupational Competence. Give an example of each.

6.1.6.1. Applied competence

- This refers to what learners should demonstrate when they complete a learning programme.

It consists of three elements:

6.1.6.1.1. Foundational competence:

This demonstrates an understanding of the knowledge and thinking that underpin the actions taken.

6.1.6.1.2. Practical competence:

This demonstrates the ability to consider a range of practical actions and make a decision about what actions to perform; it also involves demonstrating skills based on acquired knowledge.

6.1.6.1.3. Reflexive competence:

This demonstrates whether you are able to integrate knowledge and skills with understanding; it also demonstrates an ability to apply knowledge and skills in different contexts and to adapt to change in unforeseen circumstances. **Examples:** presentation skills, problem-solving, application of essential methods, fundamental knowledge

6.1.6.2. Occupational competence

This consists of three components:

6.1.6.2.1. Knowledge and theory:

This is normally provided through formal learning.

6.1.6.2.2. Practical skills:

This involves the application of knowledge and theory and the practising of occupational skills in a controlled environment.

6.1.6.2.3. Work experience:

*This involves experience gained in the workplace after completion of knowledge and theory and the practical skills components of a qualification. **Example:** apprenticeship*

STUDY UNIT 5: THE NATURE OF LEARNING AND HOW WE LEARN

1. Write down the meaning of the following items:

1.1. Competency

This entails typical behaviours (which include attitudes and beliefs, knowledge and skills) that individuals demonstrate when undertaking job-relevant tasks to produce job-related outcomes within a given organisational context. Competencies relate to specific descriptions of work tasks or job outputs that have to be achieved in order to demonstrate satisfactory job performance.

1.2. Attitude

This is a mental state of readiness, organised through experience, to behave in a characteristic way towards the object of the attitude.

1.3. Belief

This is a conviction that something is true.

1.4. Skill

This entails those aspects of behaviour that need to be performed to an acceptable level to ensure effective job performance. It includes proficiency to perform a particular task.

1.5. Implicit Learning

This is the implicit knowledge that people use daily in most of what they do, but which they cannot describe.

1.6. Explicit Learning

This is learning that requires conscious and deliberate thought and effort, such as memorising, problem-solving and understanding.

2. Reflect on the following questions:

2.1. How did you learn your mother tongue?

We learn our mother tongue through implicit learning. We can apply the principles and knowledge related to our mother tongue, but we don't really know how we gained that knowledge or what the principles are.

2.2. How do you study for an examination?

When we prepare for an examination, we learn through explicit learning. Explicit learning requires work on our part. It requires conscious and deliberate thought and effort. Explicit learning can be divided into three activities: memorising, problem-solving and understanding. Look at your answer to question 2 and decide into which category your learning for the examination will fall: is it memorising, problem-solving or understanding? Chances are most learners will concentrate on memorising – and perhaps problem-solving – to master material. However, during the course of this semester, you should try to concentrate on the understanding level of explicit learning because this will ensure that you are able to apply the concepts you will be learning to your work situation.

2.3. How do you learn to fit into a group?

We use implicit learning to help us fit into a group. No one gives us a crash course on the group's norms and values and which behaviours will be acceptable and unacceptable. We learn these things by observing the behaviour and listening to the verbal exchanges of the group members.

2.4. How do you learn to do a job?

We learn to do a job through a combination of implicit and explicit learning. Our colleagues will explain certain aspects of a job, but other aspects we will pick up as we go along, through observation and asking questions and, sometimes, by making mistakes. When we receive feedback from our colleagues, it will help us to learn to do our jobs. Can you see that when we learn to do our jobs, we do not sit and memorise certain aspects? We move through problem-solving to understanding (try something, make a mistake, get feedback) and thus we learn to do whatever it is in the correct way. Thus explicit learning later becomes implicit learning – we can usually do our job automatically, without being shown repeatedly or having to study the textbook again and again. Doing our job becomes just as automatic a behaviour as speaking, reading and writing in our mother tongue.

2.5. What is the relationship between the two different forms of learning?

After working through the questions, you should be able to “see” the difference between implicit and explicit learning.

3. Read through the following descriptions. Determine whether implicit or explicit learning is taking place.

- Nomsa is learning how to behave at the dinner table.
- Pieter has started working at his new place of work and he is still getting used to the new ideas of acceptable and unacceptable behaviour.

Both Nomsa and Pieter are using implicit learning. We are not always consciously aware of the knowledge we gain from implicit learning, but we can apply the knowledge when the situation so requires.

- Jonathan is studying for an examination and is memorising the names of the different learning theories and their characteristics.
- Siviwe is participating in a group exercise in which he is learning to apply interviewing skills.
- Seshni has to apply the interpersonal communication principles she learnt on a supervisor’s training course in her work situation.

Jonathan is memorising, which means that he is using explicit learning. Both Siviwe and Seshni are using explicit learning – they have to apply knowledge, which means that they have to understand the knowledge before they can apply it.

- Alice is doing a case study in which she has to solve the planning problems of a production manager. Alice is solving a problem, which is explicit learning.

4. Reflect on the factors that prevent you from learning. List at least five factors. Divide the factors that you listed into the following three categories:

External Factors	Internal Factors	Learning Experience

4.1. *Most of the barriers to learning exist inside us, that is, they are internal. As HRD practitioners, we must be aware not only of our own barriers to learning, but also of the possible barriers that may exist for the learners for whom we will be designing learning programmes, since we need to prevent these barriers from obstructing the learning experience. We should also point out to learners that, ultimately, only they themselves can overcome any internal barriers to learning; learners thus determine their own success in learning situations.*

5. **Summary**

5.1. What kind of learning did you use when you learnt your mother tongue?

Implicit learning

5.2. Discuss the nature of learning by explaining the concept of implicit learning.

*Implicit learning refers to the implicit knowledge that **people use daily**. They use it in most of **what they do, but they cannot describe it**. People **are not consciously aware** of the knowledge they gain from implicit learning, but they can **still apply the knowledge** when the situation requires it. **They cannot explain the relevant knowledge**. Implicit learning is described as **noticing regularities in the world** and responding to them **in consistent ways; it is automatic and occurs without conscious control**. **The end result is implicit knowledge**.*

5.3. What kind of learning do you use to study for an examination?

Explicit learning

5.4. Name the three (3) activities involved in explicit learning.

Memorising, problem-solving and understanding

STUDY UNIT 6: LEARNER CHARACTERISTICS AND LEARNING STYLES

1. Reflect on what each of these characteristics means and then decide to what extent each characteristic applies to you as a learner:

Characteristic	Does it apply to me?	Do I want this to change?
Motivation or need to know		
Readiness to learn		
Performance orientation / mastery orientation		
Level of experience		
Self-directed learning strategies		
Lifelong learning orientation		

2. Think about how your characteristics as a learner will influence your learning in this module. Are there some characteristics you would like to change? (Think very carefully about performance/mastery orientation. If you only want to pass the exam, or your only goal is to get a distinction in this subject, you have a performance orientation. If you want to really gain knowledge and understanding to prepare you for the business environment, you have a mastery orientation.) If you want to change some of your characteristics as a learner, think about how you will go about doing so.

Characteristics I want to change	How I will change the characteristic

- 2.1. *We feel motivated to learn or know something when the knowledge is important to us for some reason. If you have the ability to learn the subject matter, have the necessary experience level, possess the required knowledge and believe in your ability to do well, you are ready to learn. When we are performance-oriented, we concentrate on doing well and being evaluated positively (doing well in the test or examination). When we are mastery-oriented, we want to increase our competence for the tasks we are faced with and we see mistakes and errors as ways to learn.*

The more experienced we are as learners, the less structure we need in a learning programme; the less experienced we are, the more structure we need. Adult learners prefer self-directed learning strategies, where they set their own pace and establish their own structure. Lifelong learners have critical insight, independent thought and the ability to analyse reflectively. They manage their own learning because they possess personal autonomy and can and will initiate learning themselves.

HRD practitioners should develop and nurture the abilities of adult learners by incorporating the principles of adult learning (andragogy) into their HRD practices and processes. Always keep in mind that each individual involved in a learning experience is responsible for their own learning. From the baby who is learning to talk, to the learner who needs to pass a subject, to the executive who must learn how to deal with conflict in the work situation, we are all responsible for our own learning. Parents, teachers, lecturers, mentors and HRD practitioners make it possible for people to utilise a learning experience, but each learner decides whether they will use that experience to their own advantage.

3. List each of the principles of andragogy and then relate them to yourself as a learner.

- 3.1. *I need to know **why** I must learn this.*
- 3.2. *I am capable of **self-direction**.*
- 3.3. *I have **prior experiences** that can be **utilised** in the learning experience.*
- 3.4. *I am **ready to learn** when I must solve a problem or fill a gap.*
- 3.5. *I learn best when I have to solve problems in a **real-life situation**.*
- 3.6. *I want to learn because **I have decided to**, and not because it will give me a promotion or because someone else convinced me that it would be a good idea.*

4. Read the following information and reflect on the questions in the following section:

How do we process information?

Every day we receive information through our senses, but we process only that information to which we pay attention. This is called selective attention (Dooley et al, 2005). Think of a time when you were engrossed in a conversation with someone and then clearly heard your name mentioned by someone else in the same room. This is an example of selective attention. Another example is when you start thinking about buying a new car or cell phone. Have you noticed how often you see the same model of car or cell phone that you want to buy? You probably saw that model of car or cell phone just as often before you made your decision, but you did not pay attention to it at the time.

Sometimes behaviours become automatic. We do not have to pay as much attention to these behaviours as we had to when we first started doing them. Think about making a cup of coffee. How much attention do you pay to all the tasks involved in making the coffee? And yet, how often do you burn yourself with hot water or forget to add sugar? This is called automaticity (Dooley et al, 2005). You have made coffee so often that it has become automatic. You can make a good cup of coffee without consciously thinking about it. This example is related to implicit and explicit learning.

4.1. *Before we can remember information, it must be repeated and encoded (related to concepts we already have in our memory). We can also arrange the information in some kind of logical order, but the best way to remember is to make meaningful connections with something we already know. This means that we must understand what we are reading or doing before we can successfully remember information and integrate that information into our daily lives.*

5. Think about situations in your own life where you learnt through social learning. Write down a few examples.

5.1. *Is there someone whose behaviour, social situation or work experience you admire? Do you find yourself emulating (copying) this person's behaviour, grooming or way of addressing others? If so, you are engaged in social learning. Chances are that the first person you found yourself copying when you were a small child was your mother or father. How often did you tell others (and yourself) that you wanted to be just like your mommy or daddy when you grew up? This is social learning. Social learning continues throughout our lives.*

6. From the following examples, identify which learning theory is being described. Explain how you identified the learning theory.

Description of learning theory	Explanation
People learn because they are offered a reward for doing things.	<i>When we learn because a reward is offered, the behaviourist approach is at work.</i>
People are concerned with the thinking processes involved in learning and their long- and short-term memories and the attention they pay to the information they receive from the world influence the way they learn	<i>A concern with thinking processes indicates cognitive information processing.</i>
People learn through social situations. They are influenced by the situation, but they also influence the situation.	<i>Learning through social situations involves the social learning theory.</i>

7. Reflect on how you prefer to learn. Which of the four phases describes the way you prefer to learn? Are you a
- watcher?
 - thinker?
 - doer?
 - feeler?

How will you incorporate the other three phases in your learning experiences to ensure effective learning?

7.1. *According to Kolb, our learning will be more effective (move towards understanding and implicit learning) when we incorporate all four phases into our learning experiences. For example, I tend to be a doer, wanting to apply what I have learnt practically. I also tend to teach that way, so I need to ensure that I incorporate watching, thinking and feeling into my own learning and into the way I facilitate other people's learning.*

8. What is your learning style preference? Think back to a mathematics, science or language class when you were at school. Some of the learners always understood what the teacher was trying to explain, while others were completely lost. This has as much to do with learning styles as it does with intelligence. How many of you were good at mathematics and science, but poor at languages? And for whom was it the other way around? Did you do well in a test when the subject matter was easy to memorise (such as business management), or did you perform better when you were required to understand and apply your knowledge or skills (such as science or languages)?

8.1. *Our preferred learning style(s) will influence how well we learn when using certain learning materials and how well we master certain learning contents. For example, I struggled with maths and science at school, but excelled at languages. I'm still not very good when it comes to analytical content, but I can do very well when applying what I have learnt. How about you? Why is this knowledge important for HRD practitioners? The learning interventions we develop should be presented in such a way that they engage more than one learning style. We can thus involve more diverse learners actively in the learning experience and make the learning content not only understandable, but also enjoyable to learn and interesting to apply.*

9. Summary

9.1. Assanda is working as a receptionist in a small consultancy firm. After school, she had no money for further study and started working as a cleaner for a firm who cleans office blocks. She completed a certificate in office administration and then realised that she would also need to be competent in the use of a computer in order to work effectively. She therefore enrolled for various computer courses. She is currently enrolled for a secretarial diploma, which she studies part-time. List any five (5) abilities of Assanda as a lifelong learner.

- 9.1.1. *Develop and be in touch with curiosities.*
- 9.1.2. *Formulate questions that can be answered through enquiry.*
- 9.1.3. *Identify the information required to answer different questions.*
- 9.1.4. *Locate the most relevant and reliable sources of information.*
- 9.1.5. *Select and use the most efficient methods for collecting the required information from the appropriate sources.*
- 9.1.6. *Organise, analyse and evaluate the information to get valid answers and generalise, apply and communicate answers.*

STUDY UNIT 7: PRINCIPLES OF LEARNING

1. Describe how learning to drive a motor-vehicle involves part learning. Next describe whether you think the learning sequence is likely to be different for learning to drive a car with an automatic transmission compared with one with a manual transmission.
 - 1.1. *Learning to drive a car involves learning to operate the controls of the car (pedals, steering wheel, gear lever, etc.). You have to master each of these controls and then learn how to use them together before you can drive a car successfully and safely. Even before you learn to drive, you have to learn the rules of the road and road safety. You also have to pass the learner driver's test before you can legally get behind the steering wheel of a car.*
2. Explain the psychological and physical fidelity involved when you learnt to write
3. Were you exposed to overlearning when you were taught to write? Explain
4. Did learning to write expose you to whole learning or part learning? Explain your answer
5. Did learning to write involve massed practice or distributed practice?

When we are taught to write, we start with the small letter "a" and then move on to the small letter "b", and so on, until we have mastered the whole alphabet in small letters. We then move on to learning the capital letters. This indicates that we are involved in part learning. We master one letter before we move on to the next one. We also practise writing the letters over and over again: thus we are exposed to overlearning with the purpose of making the writing of that specific letter automatic. Physical and psychological fidelity are involved in that we use writing materials that others also use (a pencil and paper or, later, a pen and paper). We are also developing the specific competencies we need to master the art of writing. Learning to write involves distributed practice, because we practise one letter for a few days before moving on to the next one.
6. Think about learning to cook a certain dish. Does this involve whole or part learning?

Learning to cook a specific dish involves whole learning. We have to do all the activities involved in cooking that dish at the same time, or on the same day, so that we can cook the dish successfully. However, learning to cook initially involves part learning. Can you still remember how you learnt to cook? You probably started by making coffee, later on learnt to boil some eggs and then learnt to cook more advanced dishes, such as mielie pap and rice. By now you can probably cook a three-course meal, but you first had to learn how to cook bit by bit.
7. Reflect on the following question:
 - 7.1. How intelligent are you?
 - 7.2. What do we mean by "intelligence"?

Intelligence is a multifaceted concept. It is no longer measured only by IQ, but also by our ability to excel in many other spheres, such as those relating to our emotions (where our emotional intelligence [EQ] is measured). EQ stands for emotional quotient, just as IQ stands for intelligence quotient.
8. Review the statements below and answer the following questions:
 - 8.1. Identify your preferred emotional style
 - 8.2. How does your preferred style influence your interpersonal relations and your ability to learn on your own and in a group?

Think about your preferred emotional style and how this will influence your ability to learn. The implications for HR Practitioners is that we should involve as many kinds of intelligence as possible in the design and delivery of HRD interventions.
9. **Summary**
 - 9.1. Which approach would be better to use when you are preparing for an examination for HRD1501 – massed or distributed practice? Give reasons for your answer.
 - **Distributed practice:** Practice occurs over a longer period of time and is interspersed with rest periods.
 - 9.2. When a child learns to write the alphabet by learning to write one letter at a time, is the child involved in whole or part learning? Give reasons for your answer.
 - **Part learning:** Sub-tasks are practised separately and are later combined.

- 9.3. Which principle of learning is used when a commercial airline pilot trains in a flight simulator? Why is it essential to use this principle of learning in the training of pilots?
- **Physical fidelity:** *Fidelity is the extent to which the task in the training situation is similar to the task required on the job. There should be elements and tasks in the training environment that are identical to the elements and tasks in the work environment. The existence of fidelity in training tasks increases the benefit that training will have on job performance. Physical fidelity refers to the extent to which the training tasks, equipment used and environment mirror the physical features of the actual work situation.*

TOPIC 3: EDUCATION, TRAINING AND DEVELOPMENT IN THE SA CONTEXT

STUDY UNIT 8: SAQA AND THE NQF

1. Explain what the NQF is:
 - 1.1. *The NQF is an idea (or construct), not a physical thing or body that you can see or touch. It is an integrated system for education and training in South Africa. All qualifications, including the qualification that you are studying towards, are registered on the NQF.*

2. What are the characteristics of the National Qualifications Framework? (Definition of “characteristic”: typical or distinctive; a prominent aspect of something; a distinguishing quality)
 - 2.1. *Characteristics of the new NQF:*
 - *There is a 10-level NQF.*
 - *Unit standards-based qualifications and whole qualifications are both valid.*
 - *The 12 National Standard Bodies have been replaced by Standards Advisory Panels for the purposes of standard setting (to streamline the NQF).*
 - *The Standard Generating Bodies (SGBs) have been replaced by Communities of Expert Practices (CEPs).*

3. In which band and at what level will the national diploma in human resource management be registered on the new NQF?
 - 3.1. *The diploma in HRM is registered on NQF Level 7*

4. Identify the principle of the NQF that is illustrated in the following descriptions.

Description	NQF Principle
Mary has been studying towards a BCom degree in human resource management, but has decided to change to the national diploma instead. She has successfully completed enough modules of the BCom degree to enable her to complete her diploma after one year.	
For the past 15 years, Nonhlanhla has worked as a supervisor in a chain of retail stores. During this time she has completed many in-house training courses on issues such as performance management and training and development of staff. She has applied for credit for the module Personnel Management I of the national diploma in human resource management.	
Peter has been studying towards a national diploma in human resource management at the Tshwane University of Technology. He has been offered a job as a trainee manager in a retail store and has decided to continue his studies through Unisa.	
Gugu has completed a national certificate in human resource management and is continuing her studies in order to obtain a national diploma in human resource management.	
David had to leave school at the age of fifteen to help take care of his siblings after his father died. He is a gardener. He has completed grade 10 through a community college. His employer has offered to pay for his tuition at a formal school and David has applied for a	

place at a high school in his employer's neighbourhood.	
A tertiary institution wants to develop a curriculum for a new postgraduate degree. It has invited business representatives, student representatives, union representatives and community representatives to participate in the curriculum development process.	

4.1. The principles of the NQF were explained in this study unit. They are as follows:

- **Integration** – allowing learners from various learning backgrounds to progress either to higher levels of learning or to related fields of learning, for example allowing someone with a diploma to enrol for a postgraduate degree, on completion of certain modules
- **Articulation** – allowing learners who have engaged in various forms of learning to have access to other educational opportunities, for example allowing a graduate from an FET college access to a diploma course if they meet the minimum requirements
- **Flexibility** – allowing for multiple pathways to achieve the same learning ends, for example allowing a person to achieve a qualification either through formal study or a combination of formal study and work experience
- **Access** – providing ease of entry to appropriate levels of education and training for all prospective learners in a manner that facilitates progression
- **Progression** – ensuring that the framework of qualifications permits individuals to move through the levels of national qualifications via different combinations of learning programmes
- **Coherence** – working within a consistent framework of principles and certification
- **Portability** – allowing learners to transfer credits of qualifications from one learning institution and/or employer to another
- **Recognition of prior learning** – giving credit, through assessment, for learning that has already been acquired in different ways
- **Guidance of learners** – counselling learners in order to empower them to participate fully and benefit from their learning
- **Relevance** – frequently reviewing qualifications and interaction between industry and educational designers to ensure that qualifications provide the knowledge and skills currently required by industry
- **Standards** – expressed in terms of a nationally agreed framework and internationally accepted outcomes
- **Credibility** – having national and international value and acceptance
- **Legitimacy** – providing for the participation of all national stakeholders in the planning and coordination of learning end points

5. Reflect on your own situation or that of a friend or family member. Have the principles of the NQF assisted you or anyone you know to achieve a qualification? Give a few examples and identify the principles involved.

5.1. If you were excluded from studying at certain tertiary institutions in the past, but are no longer excluded, your situation illustrates the principle of equality of opportunity. For example, many universities used to offer tuition only in Afrikaans, which excluded a large number of students. If those universities started offering tuition in English as well, they would become accessible to more students. Also, in the past, women were often not allowed to study in fields such as engineering and medicine, but that has changed. All of these are examples of equality of opportunity. I know of someone who wants to complete a BCom degree but cannot afford to study fulltime. Consequently, he works overseas for a few years and then comes back to South Africa to study for a year or two until his money runs out. Then he works overseas again for another few years to earn more money. This is an example of the principle of access.

6. Summary

6.1. Identify any ten (10) responsibilities of quality councils.

6.1.1. Quality councils are responsible for quality assurance in each NQF sector (general and further education, higher education and work-based learning) and for standards setting. Their key responsibilities include the following:

- collaborating with SAQA and the other quality councils to advance the National Qualifications Framework
- developing and managing the NQF sub-framework for which they are responsible
- advising the responsible minister on issues relating to their sub-framework
- considering and agreeing on NQF level descriptors and ensuring that they remain current and appropriate
- developing and registering qualifications
- assessing the mastery of learning outcomes against unit standards and recognition of prior learning
- developing and implementing quality assurance policies
- ensuring the integrity and credibility of quality assurance
- maintaining a database of learner achievements

STUDY UNIT 9: SKILLS DEVELOPMENT LEGISLATION IN SOUTH AFRICA

1. Develop a presentation explaining to the managers in a bank why the bank should pay a skills development levy, what the bank should do to be able to pay the levy, which is compulsory, and what it should do if it wants to claim some of the levy grants. Your presentation should consist of an introduction, body and conclusion. You may use graphics in your presentation.

1.1. Your introduction should explain what you will be discussing in the presentation and why you will be discussing it. It should also capture the attention of your listeners. The body of your presentation should include a description of why, how and to whom the skills levy is paid over and the path the money follows to the SETA and back to the employer in the form of grants. Explain that there are mandatory grants and discretionary grants. Explain how much of the money originally paid over as a skills levy the bank can claim back as grants, as well as how it can claim these grants. The conclusion should review what you have discussed and then end off with something that will help the listeners to remember what you have discussed.



2. Summary

2.1. Explain the aim and goals of the NQF Act.

2.1.1. The NQF Act aims to contribute to the full personal development of each learner and the social and economic development of all South Africans by achieving the following goals:

- creating a single, integrated national framework for learning achievements
- providing easier access to, and mobility and progression within, education, training and career paths
- enhancing the quality of education and training accelerating the redress of past unfair discrimination in education, training and employment opportunities

2.2. Think about the Skills Development Act and the Skills Development Levies Act. What impact have these Acts had on your life? Give at least one example.

2.2.1. *The purpose of the Skills Development Amendment Act is mainly to improve the working skills of the South African work force. The Skills Development Levies Act established the system of levy financing to fund skills development. Provide your own example of how training had an influence on your life.*

2.3. Describe the impact of the Skills Development Act and Skills Development Levies Act on organisations. Briefly explain your answer and give at least two examples of the impact of these Acts on organisations.

2.3.1. *The Skills Development Act aims to improve the skills of the South African workforce by encouraging employers to use the workplace as an active learning environment and to ensure the quality of education and training in the workplace.*

Example: Employees are given the opportunity to attend training.

The Skills Development Levies Act relates to all employers who pay monthly wages and salaries of R500 000 or more and who pay income tax; these employers must pay a skills levy of 1% of the payroll. When employers who pay the levy comply with certain requirements, they can claim some of the levy back as levy grants. Note: It is employers and NOT employees who pay the levy.

Example: Organisations paying skills levies and claiming it back to train workers

STUDY UNIT 10: THE OCCUPATIONAL LEARNING SYSTEM (OLS)

1. Discuss the role of each component of the Occupational Learning System in accelerating the development of skills in South Africa.

1.1. *The Occupational Learning System consists of the following components:*

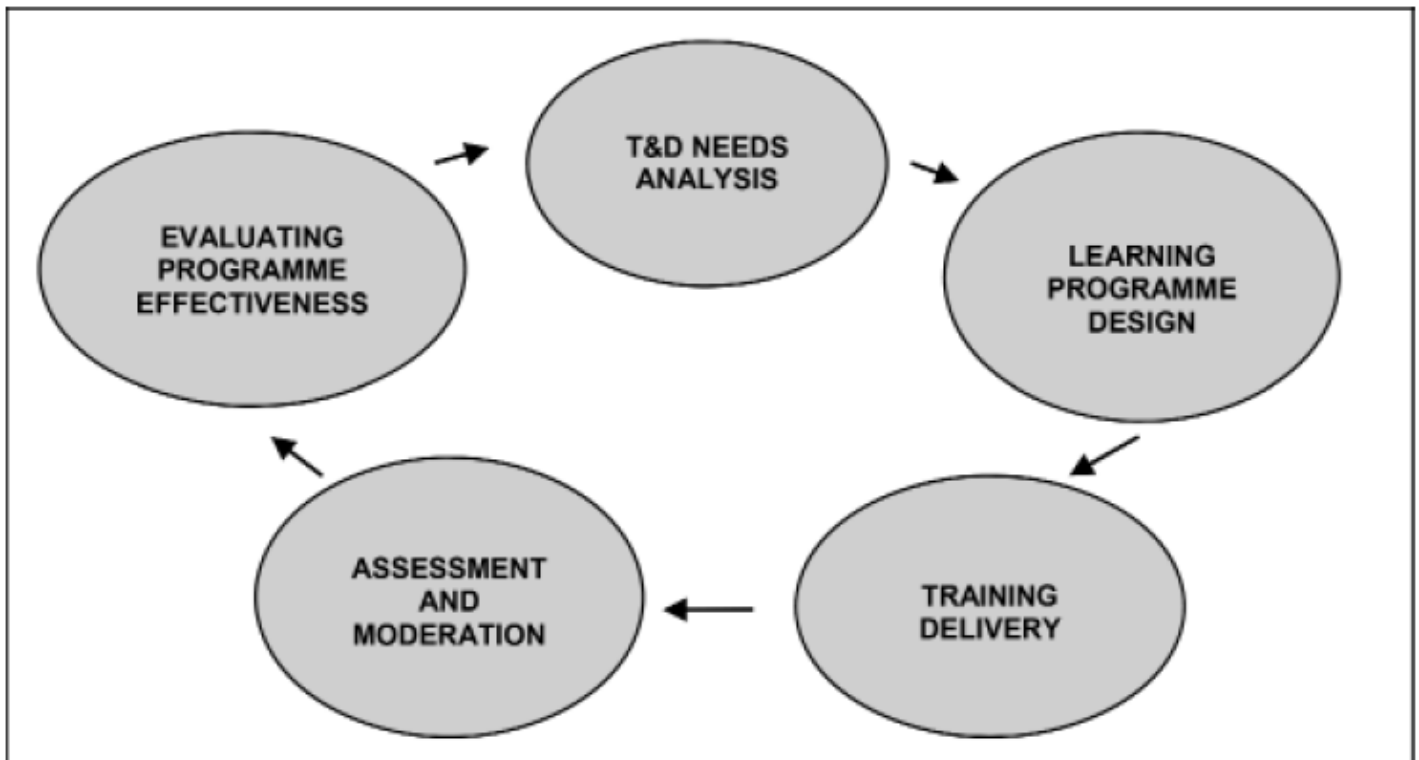
- **The labour market** – *The labour market is where skills, knowledge and experience are traded. Business organisations need (demand) certain knowledge, skills and experience, and individuals offer (supply) certain knowledge, skills and experience on this market. The labour market is similar to a grocery store. In the grocery store you can choose whether to buy Kellogg's cornflakes or Bokomo wheat flakes. Their prices may be the same or there may be a small difference in the prices. You can then decide whether you will buy the less expensive brand (Kellogg's is a brand, and so is Bokomo) or the one that you like the most. Employers do the same on the labour market – they go shopping for the skills, knowledge and experience they need and they also decide how much they are prepared to pay for them.*
- **Employment Services South Africa (ESSA)** – *Employers and private employment agencies are required to register vacancies with ESSA. It is essentially a government database of vacancies and also an employment agency. It provides a record of the demand for and supply of skills in the labour market.*
- **The Organising Framework for Occupations (OFO)** – *This is a framework for categorising all occupations and groups of occupations, from entry level to advanced levels of competence. It interfaces with the labour market and helps us understand what is happening in terms of skills demand and supply. It will register occupations (NOT qualifications) from levels 1–8 on the Occupational Qualifications Framework. It provides information on occupations, not qualifications. Occupations are grouped using skills level and skills specialisation. Skills levels indicate the range and complexity of the set of tasks required to perform an occupation. Skills specialisation focuses on particular specialist knowledge, or tools and equipment used, or materials worked on, or goods and services provided at a particular skills level.*
- **The National Occupational Pathways Framework (NOPF)** – *This is a career-based occupational framework that shows upwards and sideways career path options, as well as links with related occupations. Each career path offers two possibilities of progression – increased specialisation and mastery of skills and broader, far-reaching levels of management and control of people and production processes. The NOPF provides information for appropriate and relevant skills development and interventions in organisations and nationally. It is essentially the place where the data from the Organising Framework for Occupations is integrated into NQF levels and thus forms a link between the OFO and the NQF.*

- **The Occupational Qualifications Framework** – This is a sub-framework within the NQF that provides a structure for designing, delivering and assessing occupational learning. It spans levels 1–10 of the NQF for all occupational qualifications.
 - **Sector skills plans** – These are strategic skills development plans for each economic sector and are based on data gathered from the workplace skills plans of individual employers and data gathered from research.
 - **The Quality Council for Trades and Occupations** is the quality assurance and standards setting body responsible for occupational qualifications.
 - **Communities of expert practice** are groups of expert practitioners who are currently practising in occupations and who will use their expertise (knowledge, skills and competence) to contribute to the development and quality assurance of occupational qualifications.
2. You have been appointed as an intern in the training department of a large banking group. Your manager, the director of training and development, must develop a presentation on SETAs for the regional managers. Help your manager to develop a PowerPoint presentation, explaining what a SETA is, its functions, sector skills plans and workplace skills plans. Indicate what the regional manager and director of training and development's responsibilities are with regard to SETAs, sector skills plans (SSPs) and workplace skills plans (WSPs).
- 2.1. Remember that a PowerPoint presentation is similar to a report, although it is not exactly the same in all respects. You should condense the information in a presentation, providing only the main points on the slide and then discussing them orally. Never use full sentences on a slide and use appropriate pictures or diagrams rather than words. The PowerPoint presentation should include an introduction and a body, where you give a short description of a SETA and indicate its functions. You can also indicate which SETA the banking group should register with. You should explain what a sector skills plan is and give a brief description of the kind of information it should include. Lastly, you should explain what a workplace skills plan is and the kind of information it should contain. In the summary, you can briefly summarise the main facts of the presentation.
3. Briefly explain the role of the bank's skills development facilitator.
- 3.1. **Your explanation should include the following:**
The skills development facilitator (SDF) liaises with the bank and the SETA and is involved in developing a workplace skills plan and submitting it to the relevant SETA. They should advise the bank on the implementation of the WSP and ensure that training specified in the plan is implemented. During the cycle, the SDF should monitor and audit the achievement of training goals as set out in the workplace skills plan. At the end of the cycle, the SDF must assist with the drafting of an annual training report, based on the training that was implemented according to the workplace skills plan. They should also advise the bank on the quality assurance requirements for learning providers determined by the SETA and ETQA and monitor costs.
4. Distinguish between a learnership, an apprenticeship and a skills programme.
- 4.1. A **learnership** is a way to obtain a professional or occupational qualification through combining the knowledge and work-experience components of learning. A learnership has the following features:
- It must be designed by the Quality Council for Trades and Occupations (QCTO).
 - There is a formal contract between the learner, the employer and the training provider.
 - Learning includes knowledge, skills and work experience through supervised, structured, experiential learning in the workplace.
 - Achievement of the learning outcomes is formally assessed by an accredited skills development provider.
 - It leads to a national occupational award or a national skills certificate (a qualification that is related to a specific occupation).
 - It will be registered by the community of expert practice responsible for the specific national occupational award or national skills certificate.
- 4.2. An **apprenticeship** is a type of learnership that culminates in an occupational award that is registered by the Department of Labour as a trade.
- 4.3. In the context of NSDSIII, **skills programmes** are regarded as shorter programmes with a specific application or specialisation.

5. Think of one example where a person can gain sufficient work experience to receive credit for a formal qualification.
- 5.1. *An electrician's assistant or a plumber's assistant would be good examples of possibilities for RPL. However, that would depend on the kind of experience they have gained through their years of working. To qualify for credits for a qualification through RPL, the experience must be relevant to the content of the course for which the person is applying for credit.*

6. Summary

- 6.1. The labour market is central to an occupational learning system. Describe the purpose of each of the following components:
- 6.1.1. Employment Services of South Africa (ESSA)
- *Employers and private employment agencies will be required to register vacancies with ESSA.*
 - *It is essentially a government database of vacancies and also an employment agency.*
 - *It provides a record of the demand for and supply of skills in the labour market.*
- 6.1.2. the Organising Framework for Occupations (OFO)
- *This is a framework for categorising all occupations and groups of occupations, from entry level to advanced levels of competence.*
 - *It interfaces with the labour market and helps us to understand what is happening in terms of labour supply and demand.*
 - *It will register occupations (NOT qualifications) from levels 1–8 on the occupational qualifications framework.*
 - *It provides information on occupations, not qualifications.*
 - *Occupations are grouped using skills level and skills specialisation.*
 - *Skills levels indicate the range and complexity of the set of tasks required to perform an occupation.*
 - *Skills specialisation focuses on particular specialist knowledge, or tools and equipment used, or materials worked on, or goods and services provided at a particular skills level.*
- 6.1.3. the National Occupational Pathways Framework (NOPF)
- *This is a career-based occupational framework that shows upwards and sideways career path options, as well as links with related occupations.*
 - *Each career path offers two possibilities of progression:*
 - *increased specialisation and mastery of skills*
 - *and broader, far-reaching levels of management and control of people and production processes*
 - *The NOPF provides information for appropriate and relevant skills development and interventions in organisations and nationally.*
 - *It is essentially the place where data from the Organising Framework for Occupations is integrated into NQF levels and it thus forms a link between the OFO and the NQF.*
- 6.1.4. the Occupational Qualifications Framework
- *This is a sub-framework within the NQF that provides a structure for designing, delivering and assessing occupational learning.*
 - *It spans levels 1–8 of the NQF for all occupational qualifications.*
- 6.1.5. sector skills plans
- *These are strategic skills development plans for each economic sector and are based on data gathered from the workplace skills plans of individual employers and data gathered from research.*
- 6.1.6. Quality Council for Trades and Occupations
- *This is the quality assurance and standards-setting body responsible for occupational qualifications.*
- 6.1.7. communities of expert practice
- *These are groups of expert practitioners who are currently practising their occupations and who will use their expertise (knowledge, skills and competence) to contribute to the development and quality assurance of occupational qualifications.*



STUDY UNIT 11: CONDUCTING A T&D NEEDS ANALYSIS

1. Describe a T&D needs analysis.

1.1. *T&D needs analysis is about data or information. The data or information is collected, analysed and evaluated in order to identify gaps in employees' existing skills, knowledge, attitudes and competency levels. The information is gathered by investigating employees' existing competency levels, the organisation's demand for skills and the implications of new and changed roles or jobs in terms of required skills, knowledge and competencies.*

2. You are a T&D practitioner in a medium-sized manufacturing organisation. The training manager has requested you to do the following needs analyses:

- Find out which of the employees in the plant cannot operate the machinery optimally and the reasons for this.
- Compare the employees' existing skills and competency levels with the organisation's strategic plan, and identify the skills and competencies employees will need to implement the strategic plan. Which of these is a proactive needs analysis and which is a reactive needs analysis? Give reasons for your answer.

2.1. *Proactive needs analysis focuses on the future and reactive needs analysis focuses on the present. When an organisation wants to identify the skills and competencies that employees will need in the future, a proactive needs analysis is required.*

2.2. *When the needs analysis focuses on an existing lack of skills, the organisation is involved in a reactive needs analysis.*

2.3. *Identification of the skills and competencies employees will need in future is also one of the purposes of human resource planning, which you should learn about in the human resource management modules for the Diploma in Human Resource Management. In this sense, T&D needs analysis contributes to the strategic approach to human resource management.*

3. Identify the causes of the following performance problems and suggest possible solutions:
 - Employees on an assembly line cannot produce the required quantity of products in the specified time because they do not receive all the parts they need on time.
 - Data capturers who are seen to work overtime receive better salary increases than those who do not work overtime, but those who do not work overtime still capture more data more accurately than those who do work overtime.
 - Sales representatives are unsure of the targets set for a specific period and, therefore, do not know if they are meeting the performance standards.
 - A new employee working on a manufacturing machine makes many mistakes.
 - On closer inspection, it is discovered that he received only half a day's training before taking on the work.
 - A typist who is able to type 40 words per minute types only 30 words per minute and, therefore, cannot get her work done on time.
 - A laboratory technician who works in a pathology laboratory faints at the sight of blood and cannot perform adequately.
 - A company delivery man refuses to take out deliveries after 14:00 because he wants to leave work at 16:00 and reckons he will not be back on time if he goes out on a delivery after 14:00.
- 3.1. *System problems are factors in the environment over which employees have little or no control, but which affect their ability to perform adequately in their jobs. When a system problem causes poor performance, the system problem should be eliminated. Feedback on work performance is important to all employees. When we don't know how well we are doing in our jobs, we don't know if we should improve our performance or not. When inadequate feedback causes performance problems, it is the supervisor, and not the employee, who needs training. Organisational rewards such as salary increases and incentives show employees how they should behave in order to be rewarded. If an organisation rewards its employees for being at work, when it actually wants its employees to produce more or better-quality work, there is incongruence (a discrepancy) regarding the rewarding of behaviour. If this is the cause of performance problems, the reward system should be changed. Even when there are gaps in knowledge, skills and attitudes, training is not always the solution to the problem. If an employee has the required knowledge and skills, but not the correct attitude, other solutions can also be considered, such as a transfer to another position for which the employee is more suited, changing the nature of the job or termination of employment. Training should be considered only when there is a real and obvious shortcoming in terms of knowledge, skills and attitude, and when other solutions to the performance problem have been adequately considered.*
4. You are an HRD practitioner working for a bank. One of the section managers has requested a training programme to improve staff morale. You want to conduct a needs analysis before you embark on any training. The section manager feels that this would be a waste of time. Explain to her what information you will be able to gather from a needs analysis.
 - 4.1. *A needs analysis provides information about the skills gaps that exist in employee skills, the causes of these gaps, and the employees who will be involved in the training intervention. Skills gaps indicate the difference between what the employee should be able to do, given the requirements of their job, and what the employee is actually capable of doing. Those involved in training employees must first know what these employees actually do know and can do. The needs analysis can also identify characteristics of the target group (the employees who will be participating in the training intervention). Employees often have different education and experience levels, come from different socioeconomic and cultural backgrounds, belong to different age groups, exhibit differences in their existing knowledge, skills and attitudes, and have different beliefs about their own abilities to master the learning material and their motivation to learn. All these factors must be taken into account in the design and delivery of learning materials and programmes. A needs analysis also provides a basis for evaluating training effectiveness and for later feedback on, and possible changes to, the training intervention.*

5. Identify an organisation. This may be an organisation where you or a friend or relative works, or any other organisation. Now identify the SETA to which this organisation belongs. Access the SETA's web page and try to find this SETA's sector skills plan. If you do not have internet access, use an internet café or visit a branch of the national library or one of Unisa's regional offices. Study the sector skills plan. Make notes of the strategic priorities of this sector's skills plan.

5.1. *I work as a lecturer for Unisa, which is registered with the ETDP SETA (Education, Training and Development Practices Sector Education and Training Authority). Some of the strategic priorities identified by this SETA are as follows:*

Constituency	Skills Priorities
Department of Education	<ul style="list-style-type: none"> • Generic management • Labour relations • Information technology and computer studies • Business writing skills
School Governing Bodies	<ul style="list-style-type: none"> • Management and leadership • Adult Learning (e.g. ABET) • Communication Skills
Further education and training	<ul style="list-style-type: none"> • Assessment and moderation • Facilitator training • Human resource management
Trade Unions	<ul style="list-style-type: none"> • Information technology • Communication Skills • Corporate governance
Private providers	<ul style="list-style-type: none"> • Adult learning (e.g. ABET) • Assessment, moderation and facilitation • Financial skills • Business administration and general management

6. Identify the data that the organisation should analyse in the skills audit

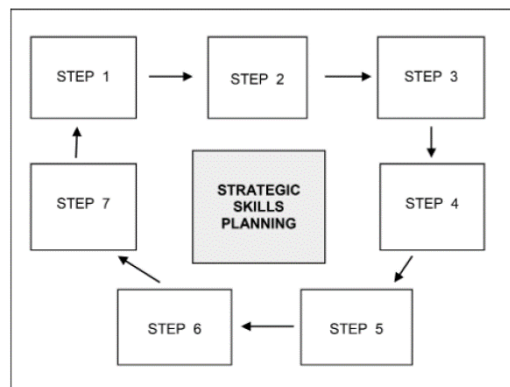
6.1. *Strategic skills planning is a process. This means that information from the current skills plan should be used for future skills planning. The process starts with an examination of the organisation's strategic goals to determine the future skills needs. A skills analysis is then done to determine the skills levels currently available in the organisation. A skills gap analysis provides information about the skills employees should possess, but do not. Once the HRD practitioner has determined which of the skills gaps can be addressed effectively through training, they can identify learning interventions that will improve skills, knowledge, attitudes and competencies.*

The suppliers of the T&D interventions can then be identified. All of this information can be summarised in the workplace skills plan, which is then submitted to the SETA. The process then starts again. It is important to remember that the workplace skills plan must be implemented for the skills planning process to have an effect on the skills levels of the organisation. The skills audit should include an analysis of the organisation's business (strategic and operational) objectives, the national and sectoral skills requirements applicable to the organisation's business sector, the technology used in the organisation, the organisation's structure and how the work is organised. Only then can an analysis of the employees be conducted. This includes information on employee demographics, levels of education, work experience, job roles and responsibilities, and current competency levels. In addition, you should include information about employees' employment status, where they are located, the length of time in their jobs, their attitudes and the organisation's culture.

7. Discuss the steps that the organisation should follow to compile a workplace skills plan.

7.1. Before an organisation can start compiling a workplace skills plan, it should establish a workplace skills development committee, which should develop a vision, mission, mandate and service delivery targets for the organisation. The vision, mission, mandate and service delivery targets must be aligned with the organisation's strategic objectives. The skills development facilitator should then prepare the statistical information required by the SETA. The next step is to develop a skills matrix (discussed earlier) and a human resource development (HRD) strategy for the organisation. The HRD strategy should address the strategic priorities and skills gaps.

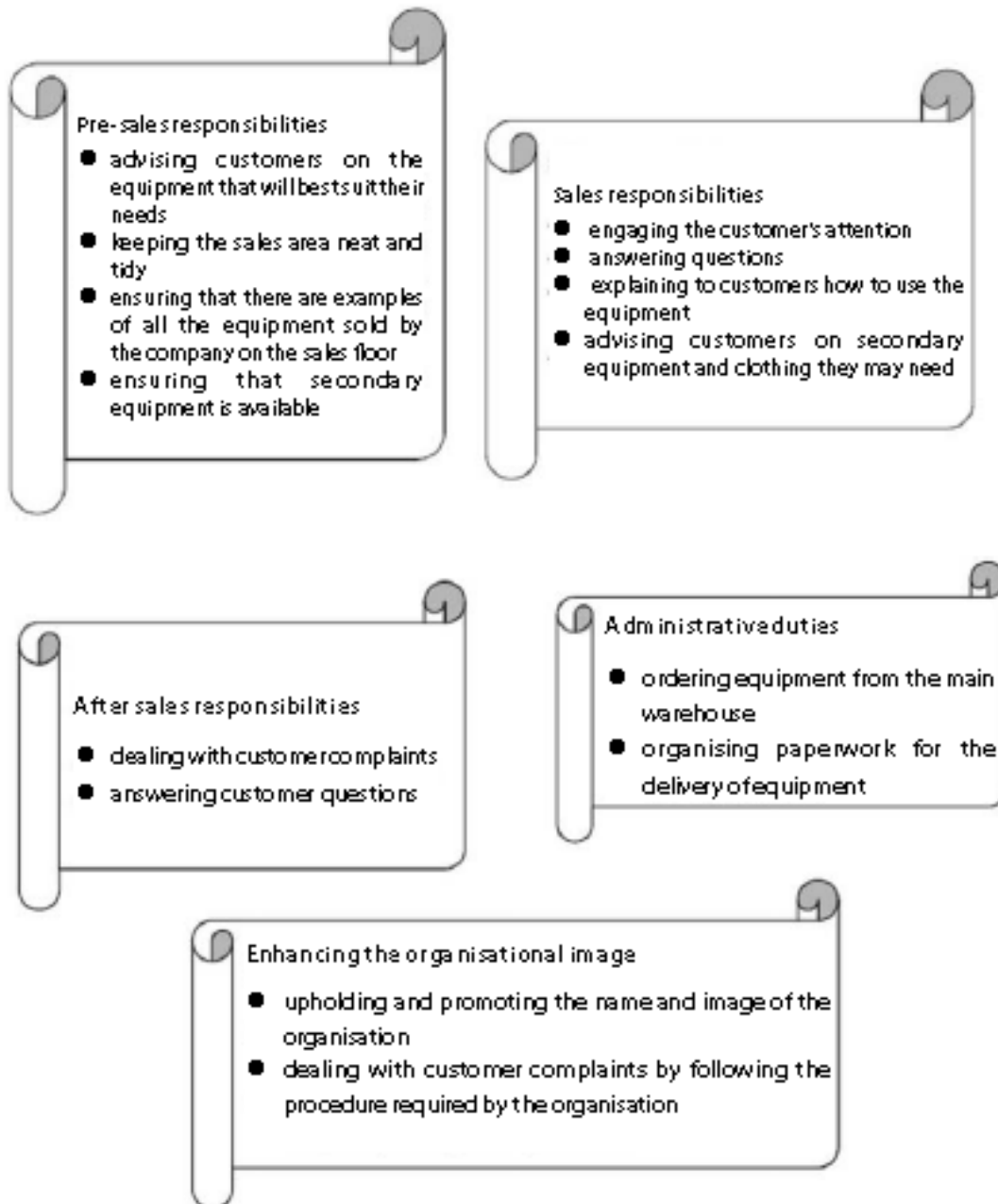
These must be filled in on the workplace skills plan, which can then be submitted to the SETA.



8. Identify the five main task clusters for a customer care consultant.

- selling equipment
- organising paperwork for delivery of equipment to the despatch department
- dealing with customer complaints
- explaining to customers how to use the equipment
- ordering equipment from the main warehouse when a sale is completed
- advising customers on the equipment that will best suit their needs
- upholding and promoting the name and image of the organisation
- answering customer questions
- keeping the sales area neat and tidy

9. Give a description of the tasks involved in each of the identified task clusters. Based on the task analysis, give examples of the typical training needs of customer care consultants.



10. Use the tasks and task clusters you identified in the previous activity to analyse the tasks in terms of the KSAOs required to complete the task, then classify these tasks according to specific competencies.

10.1. A customer care consultant requires the following **foundational competencies**:

- knowledge of the exercise equipment the company sells
- knowledge of the secondary equipment that customers can use
- knowledge of the administrative processes of the company
- knowledge of the policies of the company

A customer care consultant requires the following **practical competencies**:

- the ability to use and demonstrate the exercise equipment for sale by the company
- the ability to fill out the forms to order exercise equipment from the main warehouse
- the ability to refer customer complaints to the person responsible

A customer care consultant requires the following **reflexive competencies**:

- the ability to use the knowledge and skills of how to deal with angry customers to defuse or avoid conflict situations with colleagues

11. After reflecting on your current job, work through the items below.

- Draw up your personal development plan. If you do not have a job profile, use your ultimate career goal and your current competency profile to determine your development gaps and T&D needs.
 - 11.1. *You will see that the responsibility for your personal development and the achievement of your career goals ultimately lies with you. If you do not have clarity on what you want to achieve in life or in your career, and are not prepared to assume the responsibility for driving the process and monitoring your own progress, very little will happen. Organisations usually concentrate on developing knowledge, skills and competencies that will assist the organisation to achieve its goals.*

12. Summary

12.1. What are some ethical concerns in conducting a T&D needs analysis?

12.1.1. *A TNA and/or skills audit collects sensitive information, particularly in respect of an individual's knowledge and skills gaps. An individual's needs and rights have to be respected.*

In addition, major planned changes in an organisation may give rise to new T&D needs. Senior management may wish to keep the planned changes secret. In these situations, T&D professionals may need to convince senior management that they need to gather data to plan timely T&D interventions that will contribute to the success of the initiative. T&D professionals then have to conduct a TNA while maintaining confidentiality (CIPD, 2007).

12.2. What are the differences between a task analysis and a person analysis?

12.2.1. Task analysis

- *This examines what employees must do to perform their jobs properly; task analysis helps to determine the content of a learning programme.*
- *A job/task analysis identifies and describes the tasks performed by employees and the knowledge, skills, attitudes and other behaviours needed for successful job performance.*
- *It generally consists of developing task statements, determining homogeneous task clusters, which are more usable and manageable than individual task statements, and identifying competencies or knowledge, skills, attitudes and other behaviours required for the job.*

12.2.2. Person analysis

- *This identifies the individuals within the organisation that should receive training, and the kind of training they need.*
- *Employees' needs can be assessed using a variety of methods, for example the performance evaluation system, 360-degree feedback system and self-evaluation.*
- *Objective data on accidents and job performance are often examined as part of the needs analysis; written tests are used to assess employees' current job knowledge.*
- *Assessments of employees' personality, ability and prior learning experience are increasingly being used as part of the needs analysis process.*

STUDY UNIT 12: OUTCOMES-BASED LEARNING PROGRAMME DESIGN

1. What is an outcome-based and learner-centred approach?

1.1. *With an outcomes-based and learner-centred approach, the learning outcomes indicate what the learner must know, understand and be able to do at the end of the learning programme. Learning designers always start with the desired results in mind and then determine what knowledge, skills, behaviour and attitudes are needed to accomplish these. These skills, knowledge, behaviour and attitudes are generally related to the tasks and duties/responsibilities associated with an occupation/job that assist the incumbent in delivering a required product or service to the company at a specific performance standard and at a particular NQF/OQF level.*

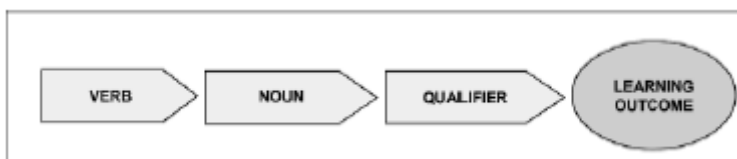
2. What is the purpose of the learning outcomes at the beginning of each study unit in this study guide?

2.1. *The learning outcomes at the beginning of each study unit indicate what you, the learner, must know, understand and be able to do by the end of the study unit.*

3. Reflect on your learning experience so far in this module. Evaluate your learning experience against the description of the learner-centred approach given in the study guide and indicate where this approach was followed in this module and what improvements can be made.
 - 3.1. *With the learner-centred approach, the learner must be at the centre of the learning experience. This means that the learning outcomes, learner support materials, learning activities and learning content should all be developed and designed with the learner in mind – and with the learner almost in control of the process. The role of the facilitator is to enable the learners to learn by providing information and knowledge, and by giving feedback on performance in such a way that the learners feel that they have made the journey of discovery themselves. You will find that while a module such as this one certainly strives to be as learner-centred as possible, it will rarely achieve the goal of being completely learner-centred. This is because the module is part of a curriculum that was designed to educate, train and develop learners to master knowledge, skills and competencies that are required by the market. Therefore, we cannot take only the learners' needs into account in the design of the module contents – we also have to consider what the market requires.*
4. Reflect on how the objective and purpose of the learning programme (or unit standards) for this module influenced its design. Read through the module outcomes for this module and the learning outcomes for each topic (and each study unit) in the module. Can you see how the learning outcomes at the start of each study unit in the study guide enable you to achieve the topic learning outcomes, and how, in turn, the topic learning outcomes enable you to achieve the module outcomes?
 - 4.1. *One of the outcomes of this module is that you should be able to apply relevant principles of learning theories in the design of learning programmes. Look at the learning outcomes for topic 4. These state that you should be able to discuss the characteristics and importance of accurate and appropriate learning outcomes, develop a course outline for a learning programme, explain the characteristics of well-designed learning activities, discuss the elements of well-designed, outcomes-based learning materials, etc. Can you see that achieving all these outcomes will eventually enable you to design a learning programme?*
5. Look at the reading book of a child in grade 1. If you do not have access to such a book, get one from your local library. Compare how the child's book is written and presented with the way the information is presented in the study guide for this module. Note at least four differences between the two books.
 - 5.1. *The information in this study guide is more dense (there is more information on a page than in the child's book), it is printed in a smaller font (letter size), and more complex language is used than in the book for the grade 1 learners. The subject matter in this study guide is aimed at what you, the learner, need to learn at this stage to master the learning outcomes for this module. When you design learning programmes, you must have knowledge of, for instance, the learners' prior experience, gender, cultural background, socioeconomic status, level of education and language preference. This information will help you to ensure that the learning programme content is understandable to the learners and that they can interact with it comfortably.*
6. Which of the following is an effective learning outcome for a course on conflict resolution?
 - The participants will be able to define the concept "conflict" and describe all five conflict management techniques.
 - The participants will be able to identify correctly which conflict management technique will be appropriate in a specific situation and utilise that technique to resolve a conflict situation in a role-play.
 - 6.1. *The second learning outcome will be more effective for a course on conflict resolution. The second learning outcome focuses on resolving a conflict situation, while the first focuses on knowledge of conflict, which is not necessarily what is required in the resolution of conflict. As we learned in topic 2, we cannot apply what we don't know. The content to be covered in the first learning outcome is therefore implicit (contained) in the second learning outcome, and the second learning outcome will illustrate what the participant will be able to do and how well they will be able to do it after the training course.*

7. Identify the verb, noun and qualifier in the following learning outcome. After studying the first phase of the training cycle, that is, T&D needs analysis, the learner must be able to formulate training needs based on the discrepancy or gap experienced in the workplace.

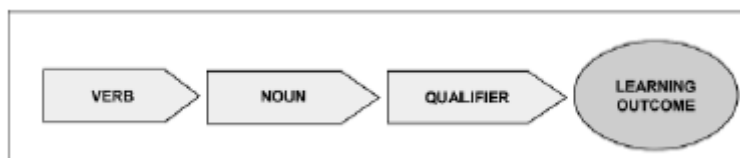
Verb: formulate
 Noun: training needs
 Qualifier: based on the discrepancy or gap experienced in the workplace



8. Write a learning outcome for a module on skills development facilitation. Break the learning outcome up into its separate parts, using the following diagram:

8.1. The following is an example of a learning outcome:

At the end of this learning session, the learner will be able to discuss the duties of a skills development facilitator in the organisation, as explained in this study unit. Read through this activity and feedback and the previous activity and feedback carefully and if you do not understand them, study this section on formulating learning outcomes again. Then redo both activities. It is vitally important that you understand how to develop learning outcomes and are able to do so in practice.



9. Using an example we have used before, reflect and make notes on how learning to use a computer forces us to interact with the new information we are receiving across the three main areas (cognitive, affective and psychomotor domains).

Cognitive Domain	Affective Domain	Psychomotor Domain
In the process of learning how to use the computer, we are exposed to bits of knowledge, for example how to log on to a network, how to use an email program and how to create and store a document	We are confronted with the technology and have to overcome certain preconceived ideas or fears about what the technology can do and our ability, as learners, to master the complexity of the technology	We learn to type on the keyboard and to use a mouse.

10. Reflect on the critical cross-field outcomes that may be addressed in a basic computer training course where learners are taught how to use a computer and basic application software such as MS Word. Make notes of the critical cross-field outcomes that may form part of such a course.

On a basic computer training course, the learners may learn how to use science and technology responsibly, how to identify and solve problems, and how to collect, analyse, organise and evaluate information. But the specific critical cross-field outcomes that are involved will be determined by the learning programme content and the way it is presented.

11. Classify the following content of a basic MS Word Compare computer training course into essential, helpful and peripheral content:

- creating a new document in MS Word
- saving a document on the hard drive
- saving a document on a flash drive
- changing a network password
- inserting a picture
- activating a printer on the computer
- creating headers and footers in a document
- e-mailing a document
- installing new software

Essential Content	Helpful Content	Peripheral Content
Creating a new document in MS Word	Saving document on a flash drive	Changing a network password
Saving a document on the hard drive	Inserting a picture	Activating a printer
Creating headers and footers in a document	E-mailing a document	Installing new software

11.1. *When you learn to use MS Word you must be able to create and save a document. The documents you type must look professional, so learning to create headers and footers is essential. While you must learn to save a document, the first option that is available is usually the hard drive, therefore learning to save a document on a flash drive is not essential content, but it is helpful. E-mailing a document is something that can also form part of the learning content of an e-mail application course (we use MS Outlook, but you may use something different), so is not necessarily essential content in a MS Word course. Changing a network password, activating a printer and installing new software are peripheral content because they may be nice to know, but will not necessarily help you to use MS Word better: this content may be more useful in another course. We must guard against thinking that everything we want to include in the course content is essential content; always be guided by the learning outcomes.*

12. Look at the examples of learning resources given in this study guide and reflect on times when some of the resources described assisted you when you were learning something new.

12.1. *You have this study guide to help you master the learning outcomes for this module.*

- *In classroom training, videos and DVDs as well as slides, transparencies and photos are often used.*
- *You are referred to the internet in the course of this module.*
- *You may belong to a study group, which could be called an interest group.*
- *You may be working in the T&D environment and will be able to learn from it.*

13. **Summary**

13.1. **Why is it important to formulate accurate and appropriate learning outcomes?**

13.1.1. *Because the whole ETD process that follows depends on developing meaningful and appropriate learning outcomes.*

- *The achievement of learning outcomes leads to the achievement of the learning programme objective.*
- *The learning outcomes help programme designers to design learning activities that give learners extensive practice in achieving the outcomes.*
- *Learning outcomes form the foundation for the design of assessment activities that help learners to build up and provide evidence that the outcomes have been achieved.*

13.2. Name the three (3) requirements to formulate appropriate learning outcomes and give an example of a learning outcome.

13.2.1. It must contain a

- verb or “doing” word
- noun
- qualifier.

Example of a learning outcome: Formulate learning outcomes that comply with the three requirements of learning outcomes.

STUDY UNIT 13: DELIVERING LEARNING PROGRAMMES

1. If you had to present the content of this module in a classroom situation, which training method/s would you use? Give reasons for your answer by explaining why the method/s you suggest would be appropriate for this content and context.

1.1. **The content of this module lends itself to the use of the following three methods:**

- presentations by the trainer to convey the theoretical content to learners, using learning support materials such as PowerPoint slides, videos and the whiteboard or flip chart
- discussions between the presenter of the training and the participants, and between the participants themselves, using buzz groups, small groups and debates; learning support materials that can be used include hand-outs, PowerPoint presentations and flip charts
- presentations by learners, demonstrating skills or abilities in the design, development, presentation and assessment of learning materials; learning support materials that can be used are hand-outs, PowerPoint presentations and flip charts

To a limited degree, the following methods can also be used:

- reflection (providing time for learners to think about own their abilities, or about how certain theoretical principles can be applied or utilised)
- reading (providing hand-outs or links to websites that learners can read or access in their own time, or during presentation of the module)
- drill and practice (setting exercises or activities that learners can do at their own pace and in their own time, e.g. exercises that prepare them to write learning outcomes)

We should guard against always using the same training methods, or methods that were valuable in other situations. The training delivery method should enable the learning facilitator to help the learners to achieve the learning outcomes. Keep in mind the minimum conditions for learning to take place when selecting training delivery methods, and then choose methods that will create an optimum learning environment. Also guard against always using PowerPoint presentations as learning support material; these create the expectation among learners that the facilitator has all the answers, and this reduces participation in discussions and debates. Participation is necessary to foster a spirit of enquiry and a desire to learn.

2. From the descriptions in the table below, identify which blended learning method is being used.

Description	Blended learning Method
Asindiwe is completing an online course in MS Word	
Sibusiso is attending an orientation programme for new employees	
Jonathan is using a flight simulator as part of his training as a pilot	
Ben is on a job rotation programme at the bank where he is employed to help him to learn as many job as possible	
Pauline is involved in a learnership at a retail organisation.	

2.1. Doing an online course could be classified as programmed instruction, technology-based training or internet-based programmed instruction, depending on the nature of the programme that the learner participates in. Orientation programmes, job rotation programmes and learnerships are workplace training methods. Training in a flight simulator is a technology based learning method.

3. Think of previous learning experiences you have had and the role the trainer played in those experiences. Review the learner-centred approach discussed in study unit 12 and make notes on how the approach of the trainer should change with the learner-centred approach to training.
 - 3.1. *Can you see that there are many similarities between the learner-centred approach and the characteristics of facilitative trainers as discussed above. If you cannot see the similarities, review the appropriate sections again and then redo this activity.*
4. Review the principles of andragogy of Malcolm Knowles (1972) and indicate how the principles of andragogy and the purposes of facilitation complement each other.

According to the principles of andragogy, adult learners will

 - *learn something when they need to (related to their roles and responsibilities)*
 - *seek to acquire skills that can be applied to real-life problems*
 - *want to direct their own learning*
 - *use their prior experience as a source of learning*

Facilitation is about

- *motivating learners to learn and apply their knowledge and skills in the workplace*
- *helping learners to become mentally ready to learn*
- *enabling learners to practise and improve their performance*
- *helping learners to retain learning and transfer it to the workplace*
- *facilitating the integration of newly acquired skills with existing skills*

5. **Summary**

5.1. Describe trainer-centred training methods.

- *Trainer-centred methods focus on presenting the learning material.*
- *Trainer-centred methods might work for some learners.*
- *The trainer is regarded as an instructor and presenter who is responsible and accountable for what learners should learn, how and when they should learn it, and if they have learnt it successfully.*

5.2. Describe learner-centred training methods.

- *A learner-centred approach involves learners in the learning process, enables them to apply their knowledge to emerging issues and helps them to integrate discipline- or subject-based knowledge in the learning process.*
- *Learner-centred training relies on learning facilitation.*
- *The trainer fulfils the role of learning facilitator and learners take ownership of their learning.*

5.3. How do these approaches differ?

- *Trainer-centred methods focus on presenting the learning material.*
- *Learner-centred methods rely on learning facilitation.*

5.4. Give three (3) examples of each method.

- *Examples of trainer-centred methods: presentations, demonstrations and tutorials.*
- *Examples of learner-centred methods: reading, reflection and discussion.*

5.5. As a learning facilitator, Chris is presenting a course in skills development facilitation. He understands group behaviour and can handle conflict effectively. Learners know that he is always on time, adaptable and open-minded. From the above scenario, identify the general skills required by a facilitator that Chris possesses and give a one-sentence description of each general skill.

- **Knowledge of and skills in group processes and group dynamics:** Facilitators should understand group behaviour and have the skills to handle conflict. They have to observe the group carefully and try to determine the mood of the group.
- **Flexibility:** An effective facilitator is not rigid, but flexible and open-minded. Facilitators must be able to adapt, act and react according to the circumstances of the group and the group procedures. The facilitator must be proactive, supportive, serious or light-hearted, as the situation requires, but always in command of the situation.
- **Time management:** Facilitation must not deteriorate into lengthy, aimless and inefficient discussions. The facilitator should be able to use and manage time in such a way that the group can accomplish its learning objective effectively.

5.6. Identify the general skills that Chris possesses as a facilitator that were not identified in the scenario and give a one-sentence description of each of these general skills.

- **Listening skills:** By listening to the learners' answers and reactions to discussions, facilitators can determine how the learners think. Not only the content of their answers is important; the attitude and emotions with which they are given and the ways in which the learners arrive at the answers are equally important.
- **Questioning skills:** Learning facilitators need to be skilful in asking questions that reflect the learning opinions and feelings, as well as questions that lead to problem-solving and interpretation of information.
- **Feedback:** The facilitator should be able to summarise, interpret and communicate the group's performance to the group. At critical and convenient moments during discussions, important information, opinions and conclusions should be summarised and shared with the group. This gives recognition to what was said and achieved and forms the basis for further discussion.

5.7. What is your own strongest skill as a learning facilitator?

Your own answer here

5.8. Siphso told you about this amazing workshop that he attended a few days ago. The learning facilitator was excellent and inspired Siphso in such a way that his work performance has improved. List and explain any five (5) characteristics of effective learning facilitation to Siphso.

5.8.1. **The facilitator establishes and maintains credibility.**

The facilitator

- negotiates learners' needs and expectations
- sets rules together with the learners so that learners know what is expected of them and what they can expect from the facilitator
- sets ground rules
- refers to their own experience and qualifications
- arrives early and is ready to start on time
- interacts with learners individually and uses their names
- is well-organised and prepared

5.8.2. **The learning facilitation is structured and organised for optimum impact.**

The facilitator

- presents an outline of the course
- sequences the materials to achieve maximum impact
- presents lectures that are well structured and easy to follow
- links the various topics
- links the content with other aspects of the course
- emphasises conceptual learning rather than simple rote learning

5.8.3. Learning facilitation is conducted in a responsive and collaborative manner.

The facilitator

- *builds responsive and collaborative relationships with the learners*
- *sets realistic and challenging goals*
- *adapts training and communication styles to meet learners' needs*
- *exhibits energy and enthusiasm*
- *responds to problems and learners' needs as they arise*
- *answers questions thoroughly and clearly and creates a non-threatening environment*

5.8.4. The facilitator gives positive feedback

The facilitator

- *encourages learners to participate through positive feedback*
- *encourages learners to engage with the material*
- *gives positive and timely feedback when learners have performed well*
- *follows the learners' progress*
- *preserves the learners' dignity and self-esteem when giving feedback*
- *actively listens to the questions/comments of the learners and responds accordingly*

5.8.5. The facilitator provides opportunities for application of knowledge and skills.

The facilitator

- *emphasises practical use of content*
- *uses assessments that identify strengths and weaknesses*
- *gives learners opportunities to demonstrate what they have learnt through simulations, role-plays, games and case studies*
- *demonstrates skills using anatomical models, role-plays and commonly available equipment*
- *shows, in a variety of ways, the on-the-job benefits of meeting the learning objectives*
- *develops practical plans to enable the learners to apply their knowledge and skills on the job*

STUDY UNIT 14: ASSESSMENT AND MODERATION IN TRAINING AND DEVELOPMENT

1. Think about why and what we assess in training and development.

1.1. *In short, assessment is about collecting evidence of a learner's learning achievements – in other words, the learner's achievement of the learning outcomes is assessed. Can you see how the four phases of the training cycle we have mentioned so far are all interrelated? Each phase provides information and serves as a stepping stone for the following phases. We need learning outcomes to be able to assess learner achievements.*

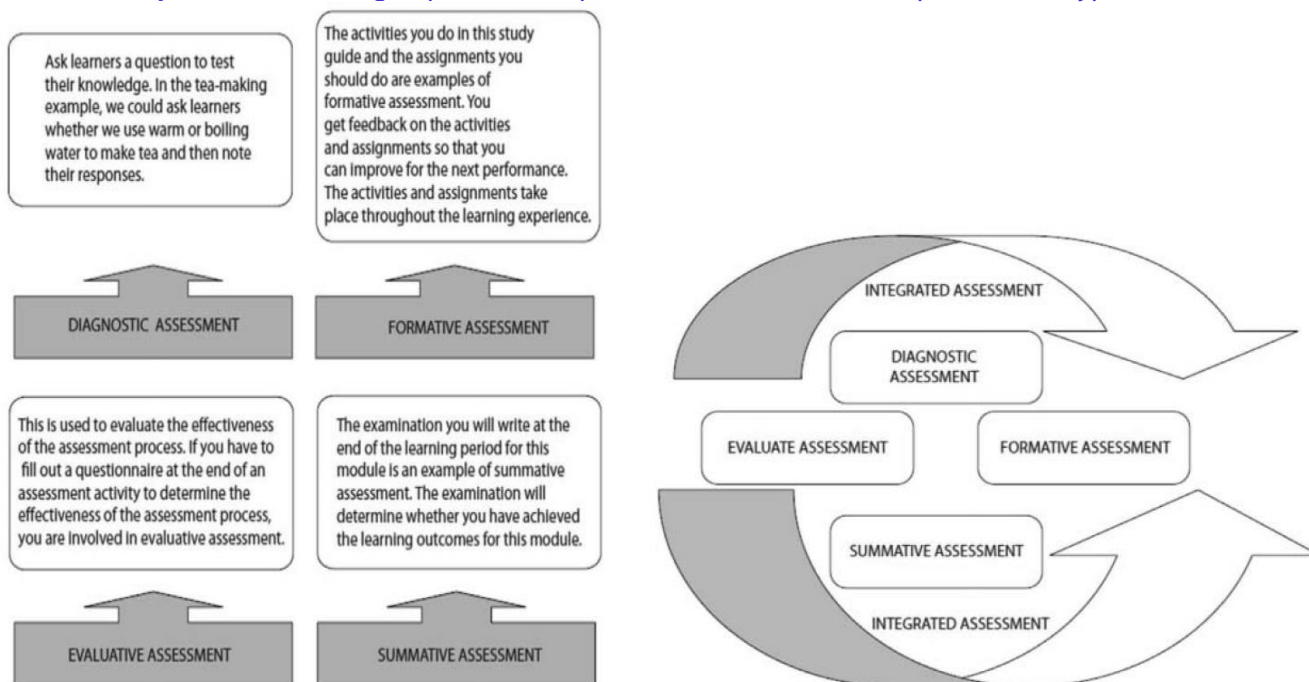
2. Identify and briefly describe the two main role-players in assessment.

2.1. *The two main role-players are the learners, who have rights and may have special needs, and the assessor, who should be competent in assessment. The requirements relating to assessors are discussed in the previous section. The assessor should consider the rights and special needs of learners to ensure that the assessment is fair, reliable and sufficient.*

3. Think of previous assessment situations you were involved in. Did you have special needs at that time, and would consideration of those special needs have influenced the outcome of the assessment?

3.1. *If a learner suffers from debilitating examination stress, writing an examination may not provide a true reflection of that learner's ability, knowledge and skill in the subject being tested. How could such a learner be accommodated? This may be difficult to do in the formal tertiary environment, but it may be possible to accommodate such a learner in the work situation. Also remember that adult learners must take responsibility for their own learning, so they could and should also think of ways to overcome any of the problems they may experience in this regard. Other types of special needs may relate to disabilities, such as blindness or the loss of a limb, which can also be accommodated in the assessment process.*

4. Think about your own learning experiences up until now. Give an example of each type of assessment.



5. Differentiate between formative and summative assessment

5.1. **Formative assessment**

- is designed to support the teaching and learning process
- assists with the planning of future learning
- diagnoses the learner's strengths and weaknesses
- provides the learner with feedback on progress
- helps to make decisions on the learner's readiness to do the summative assessment
- is developmental in nature
- does not involve the awarding of credits or certificates
- is conducted by the T&D professional

5.2. **Summative assessment**

- occurs at the end of a learning programme
- determines whether the learner is competent or not yet competent
- is carried out when the learner and assessor agree that the learner is ready for assessment
- awards credits when the learner is declared competent
- is conducted by a registered assessor

6. You have developed a learning programme on active listening skills. You want to assess the following learning outcome:

The learners will be able to apply the principles of active listening in a practical situation.

What assessment methods and instruments would you use to assess the learners' mastery of this learning outcome in formative assessment? Give reasons for your answer by explaining why the methods and instruments you choose are the best for this assessment situation.

6.1. When deciding on the type of assessment method and instrument, you should be guided by the verb and qualifier in the learning outcome. In this instance, the verb is "apply". Ask yourself how you could assess whether a learner is able to apply the principles.

You can assess application through various means, for example case studies, role-plays, demonstrations and projects.

The qualifier in this learning outcome is "in a practical situation". This indicates that a case study or project (where learners provide written evidence of mastery of learning outcomes) would not be suitable. Role-plays or demonstrations would be suitable, so either of these two assessment methods could be used.

The other issue that should be considered in assessment is practicality and feasibility. For example, if you have a class of 30 learners, how long will it take to assess each learner's mastery of the above learning outcome? The situation indicates that you should restrict the size of the class to about 15 participants in order to do proper assessment of learning outcomes.

7. Your niece is at school. She must compile a portfolio demonstrating her competency in art. Explain to her what a portfolio is.

7.1. A portfolio contains samples of a learner's work for a specific learning programme. It provides evidence of the learner's knowledge, skills, attitudes and academic development and thus a broad picture of the learner's learning. Examples of pictures, sketches and paintings, sculptures, photography, etc. can be included in a portfolio. Models also have a portfolio of their photos, which they show during interviews for model agencies.

8. You have a friend who is an electronic engineer and who wants to study physics. Physics forms a large part of electronic engineering and you feel sure that she should be able to receive recognition of prior learning for this. Explain to her what the RPL process consists of.

8.1. The RPL process is about identifying a learner's competencies, comparing the learner's competencies with the standards and criteria for a qualification, evaluating evidence of the learner's achievements against the standards, and giving credits for skills, knowledge and experience acquired through various learning opportunities and experiences. This also relates to the principles of the NQF, which were discussed in study unit 8.

9. You have been requested to deliver a skills programme called "Managing conflict in the work situation", using classroom training. The following outcomes have been formulated for the learning programme: After completing the skills programme, learners should be able to

- describe the phases of conflict
- identify the different processes involved in the management of conflict
- apply the conflict management skills in an interpersonal conflict situation

Pick one learning outcome and then explain which assessment methods and instruments you would use to do diagnostic, formative, summative and evaluative assessment of that learning outcome. How would you use integrated assessment for assessing all three learning outcomes?

9.1. **Let's use the first learning outcome as an example: Describe the phases of conflict.**

- **Diagnostic assessment:** Ask questions prior to starting with the presentation of the theory of the phases of conflict to determine how much the participants know about conflict. You can also ask them to describe conflict situations that they have been involved in, and then ask them to determine whether there were stages in that process and what these stages were.
- **Formative assessment:** During the presentation of the theory, give the learners a case study where they have to identify the stages of conflict.
- **Summative assessment:** Learners should identify and describe the stages of conflict without consulting their theoretical notes and hand-outs.
- **Evaluative assessment:** Learners should fill out a questionnaire to indicate their level of satisfaction with the section of learning and whether they feel that they have achieved the learning outcomes.

9.2. **Integrated assessment of all the learning outcomes involves the following:**

- Describe the phases of conflict.
- Identify the processes involved in the management of conflict.
- Apply the conflict management skills to an interpersonal conflict situation.

9.3. **Integrated assessment would consist of two parts:**

- First there would be a theoretical part, using a case study, where the learners identify the phases of conflict and discuss the processes involved in the management of conflict to provide a solution to the case study.
- Secondly, there would be a role-play, where two learners act out a predetermined scenario and are then evaluated on their ability to identify the correct stage of the conflict situation, identify the correct process involved in managing the conflict at that stage and, finally, apply the skills they learnt to defuse or manage the conflict situation.

10. Summary

10.1. Define summative and formative assessment.

- *Formative assessment is an ongoing assessment that takes place throughout the period of learning. It provides the learner with opportunities to practise what has been learnt, with the intention of improving performance in the next assessment.*
- *These assessments are conducted to measure learners' rate of progress towards achieving competence in an outcome.*
- *Assessment takes place formally and informally.*
- *Summative assessment is usually conducted at the end of a skills programme.*
- *It is the final measurement of what was learnt and achieved.*
- *Summative assessments should include formative assessment evaluations and a final overall assessment of whether learners have achieved the learning outcomes for the programme.*

10.2. What are the main differences between summative and formative assessment?

Formative Assessment	Summative Assessment
<ul style="list-style-type: none"> • Designed to support the teaching and learning process 	<ul style="list-style-type: none"> • Occurs at the end of a learning programme
<ul style="list-style-type: none"> • Assists with the planning of future learning 	<ul style="list-style-type: none"> • Determines whether the learner is competent or not yet competent
<ul style="list-style-type: none"> • Diagnoses the learner's strengths and weaknesses 	<ul style="list-style-type: none"> • Learner readiness determines when the summative assessment will take place
<ul style="list-style-type: none"> • Provides the learner with feedback on progress 	<ul style="list-style-type: none"> • Carried out when the learner and assessor agree that the learner is ready for assessment
<ul style="list-style-type: none"> • Helps to make decisions on the learner's readiness to do the summative assessment 	<ul style="list-style-type: none"> • Credits are awarded when the learner is declared competent.
<ul style="list-style-type: none"> • It is development in nature 	
<ul style="list-style-type: none"> • Credits or certificates are not awarded 	

10.3. Give two (2) examples of each.

Formative assessment:

- *observations*
- *oral or written tests*
- *interviews*
- *demonstrations*
- *portfolio of evidence*
- *assignments*

Summative assessment:

- *not only written examinations*
- *observations*
- *interviews*
- *questioning the learner*
- *listening to the learner*
- *reviewing written material*

10.4. Lerato wants to assess her class performance. She wants her students to show the class how to conduct an interview. She is considering using a written assignment, case studies and an oral exam.

10.4.1. Identify the assessment methods used in the scenario.

- *Written assignment*
- *Case studies*
- *An oral exam*

10.4.2. Indicate whether they are appropriate and give reasons for your answer.

- *The learning is to learn an actual skill*
- *Practical assessment (role-play or simulation) will be necessary*
- *A case study and oral exam would be appropriate*
- *However, she could make the assessment more practical*

10.4.3. Indicate at least two (2) other assessment methods that Lerato can use.

Assessment Method	Possible assessment instrument
<ul style="list-style-type: none">Personal interviews	<ul style="list-style-type: none">Interview format, questions and a clear job description or description of what is required of the candidate
<ul style="list-style-type: none">Practical demonstration	<ul style="list-style-type: none">List of expected activities and prescribed levels to indicate required level of competence
<ul style="list-style-type: none">Projects	<ul style="list-style-type: none">Clear purpose statement, scope of responsibilities, team members and instructions
<ul style="list-style-type: none">Role-plays	<ul style="list-style-type: none">Clear instructions and outcomes to be achieved

10.4.4. Give reasons for your suggestions.

The assessment methods would be more suitable to assess the students' skills in conducting an interview

10.4.5. Explain the concept "integrated assessment".

- Assessors should focus on assessing learners' ability to combine foundational, practical and reflective competencies with critical cross-field outcomes and apply them in a practical context or for a defined purpose.*
- The context of assessment should be as close as possible to real-life application.*
- Use one assessment activity for more than one outcome.*
- Use one assessment activity for more than one unit standard.*
- Integrate the critical outcomes with the learning outcomes in learning and assessment.*
- Teach and assess theory and practice with the same activities.*
- Use a complex assessment task, such as a project, to integrate all the outcomes of the learning period.*
- Assess across learning areas.*

STUDY UNIT 15: EVALUATING TRAINING AND DEVELOPMENT EFFECTIVENESS

1. Differentiate between assessment and evaluation.

- As in the case of assessment, evaluation can take place at different times: before a training intervention (known as diagnostic evaluation), during a training intervention (known as formative evaluation), at the conclusion of a skills programme (known as summative evaluation), or sometime after a skills programme (known as longitudinal evaluation) (Rothwell et al, 1995).*
- Assessment focuses on evaluating collected evidence of learners' achievements against a set standard. Evaluation, on the other hand, makes judgements about the quality and added value of skills programmes and whether changes and/or improvements in learners' performance in the workplace occurred as a result of the skills programme. The moderation of assessment practices, methods and instruments and learners' achievements is an example of an evaluation activity.*

2. You have just presented a unit standard-based course for first-line supervisors in the retail store where you are the human resource management officer. This course forms part of a qualification for managers in the retail industry. Identify the stakeholders who will have an interest in the evaluation of this course and indicate why you think they will have an interest.

- 2.1. *The list of stakeholders who may be interested in the evaluation is discussed in section 3 above. From this list, identify the stakeholders who you think will be interested in the evaluation of your course.*

3. Think about the tea-making course mentioned in activity 14.4 of the previous study unit. How would you evaluate the above criteria for this course?

- 3.1. *To evaluate learning programme design, you should use the learning outcomes as the point of departure. Did the method/s you selected for presenting this course allow you to achieve the learning outcomes? Does the content relate to the outcomes? Is this the most efficient way to deliver the training? Are the learning materials of a high standard? It is important to evaluate the learning programme design before you implement the training (present the training), and again after the training was presented to determine if any changes should be made.*
- 3.2. *Training delivery can be evaluated using a questionnaire to determine the learners' levels of satisfaction with the venue, learning materials, facilitator, facilitation process, administration of the learning programme and assessment of their learning.*
- 3.3. *Competence can be evaluated in the assessment process using the learning outcomes.*
- 3.4. *Determine the extent to which the learners achieved the learning outcomes.*
- 3.5. *For the transfer of learning, can the learners apply what they have learnt in the work situation? Are they given opportunities to practise their new skills? Do the managers and supervisors encourage the implementation of the new knowledge and skills?*
- 3.6. *Looking at the impact on organisational performance, have the tangible and intangible outputs of the organisation increased? We can use quality outputs (number of rejects, levels of waste, deviations from set standards) to measure these.*

4. Which model of evaluation would you use to evaluate training in the scenarios given in the table below?

Scenario	Model of evaluation
Your manager wants you to prove that the training you provide makes a financial contribution to the organisation, but you want to test the learners' knowledge and application	
A section manager wants to see an improvement in the sales behaviour of her sales staff.	
You are a new T& D practitioner in the organisation and your manager wants to ensure that the training programmes you design and present are up to standard	
The trade union is concerned about the level at which training is offered to its members working in a production plant.	

- 4.1. *Kirkpatrick's model is one of the most well-known models for evaluating T&D effectiveness. He describes evaluation methods at four levels: reaction, learning, behaviour and results. Phillips's return-on-investment model adds a fifth step to Kirkpatrick's model, namely return on investment, which attempts to calculate the return on the capital invested in T&D interventions. Nadler's model of evaluation focuses on the evaluation of the design and delivery of training interventions. It indicates that evaluation is a continuous process, that it should be integrated into every part of the training and delivery process and that each step should be evaluated before moving on to the next step. The emphasis is on formative evaluation, where the results of the evaluation of one stage serve as a point of departure for the next stage. Guba and Lincoln's fourth generation evaluation focuses on the claims, concerns and issues of stakeholders. These focus points determine what evaluation information is needed. The stakeholders decide what should be evaluated.*

5. Summary

5.1. Differentiate between assessment and evaluation.

Assessment	Evaluation
<ul style="list-style-type: none">• <i>Process in which evidence is gathered and evaluated against agreed criteria to make a judgement of competence for development or recognition purposes.</i>• <i>Process that a qualified and registered assessor follows to collect evidence of a learner's learning achievements.</i>• <i>A data-gathering strategy for measuring knowledge, skills, behaviour or performance, values and attitudes.</i>	<ul style="list-style-type: none">• <i>Evaluation of training concerns the quality of the training and whether the purposes of the learning programme were achieved.</i>• <i>It involves the collection of descriptive and judgemental information in order to make effective T&D decisions, including selection, adoption, modification and financial evaluation.</i>• <i>It is a set of planned, information gathering and analytical activities.</i>• <i>It determines whether the T&D intervention has achieved its goals in the most effective and efficient way possible.</i>

5.2. List and discuss the purpose of the five (5) phases of the training cycle.

- *The focus of the training cycle is the continuous improvement of learning programmes and learners' performance in the workplace.*
- *As organisations and learners' T&D needs change, so the design and delivery of learning programmes should be adapted.*
- *The design and delivery of learning programmes, in turn, influence assessment and moderation methods.*
- *Learning programme evaluation ensures continuous improvement and enhancement of learning programme design and delivery, and assessment and moderation practices.*

(1) Needs analysis

- *T&D needs analysis serves several purposes in T&D planning, design and delivery.*
- *Evaluate an organisation and individual's current situation by gathering, assessing and disseminating information about optimal and actual performance, the causes of performance problems and possible solutions.*
- *With the gathered information and data, an assessment of the gap between desired performance and current performance is conducted.*
- *Causes of existing performance-related problems and their possible future consequences can be identified.*

(2) Design

- *The design of a learning programme includes the development of measurable learning outcomes, the selection of relevant course content, the design of supportive and interactive learner guides and the incorporation of support materials.*
- *The effectiveness of the learning process depends on developing learning outcomes that are meaningful and appropriate to the needs of learners.*
- *Through the design of a learning programme, the T&D practitioner guides learners to the knowledge, skills, attitudes and behaviour they need to master.*

(3) Training delivery

- *The best-designed training intervention is doomed to fail if T&D practitioners cannot deliver it effectively.*
- *Delivering the training effectively is crucial in helping learners to achieve the outcomes of a learning programme.*
- *Delivery of training is a specific way in which learning can take place in an organisation.*
- *The aim of delivering a training programme is to accelerate and structure learning through the delivery of well-designed, outcomes-based learning programmes.*

(4) Assessment

- *The main purpose of assessment is to measure learning outcomes.*
- *Additional purposes are to improve learning facilitation, the curriculum, learning programme design and conditions for learning.*
- *Assessment is a data-gathering strategy for measuring knowledge, skills, behaviour or performance, values and attitudes.*
- *Assessors use the data gained from the assessment of collected evidence to make informed judgements about learners' competence.*
- *The purpose of assessment is to give learners access to further learning.*
- *Assessment provides ways to assess the current skills and knowledge of a learner.*
- *Assessment helps to identify further training needs by determining learners' current level of competence.*
- *When used appropriately, assessment can assist in the recruitment and selection of job candidates and can be used to monitor employees' performance.*

(5) Evaluation

- *It serves as a feedback system.*
- *The purpose of T&D evaluation is to identify performance solutions for improving the organisation as a whole.*
- *Evaluation allows T&D practitioners and managers to collect descriptive and judgemental information that is used to improve the quality of learning programme design and delivery.*
- *This information is used to make effective T&D decisions on selection, adoption, modification and financial evaluation of various T&D activities*

5.3. Discuss any ten (10) problems that organisations may experience with regard to the evaluation of learning programmes.

- 5.3.1. *Too many models and theories. This is confusing, as the different models and theories focus on a wide variety of issues.*
- 5.3.2. *The complexity of the models. Models and theories tend to be complex and contain many variables.*
- 5.3.3. *The general lack of understanding about evaluation.*
- 5.3.4. *The lack of research skills. Effective evaluation comprises a research process.*
- 5.3.5. *Difficulty in identifying the impact of training on specific variables. It is often difficult to identify specific variables, or the specific impact that a training intervention has on an organisation.*
- 5.3.6. *Evaluation is considered a post-programme activity. Most evaluation focuses on the end results of training programmes, rather than on the process.*
- 5.3.7. *Managers do not see the long-term advantages. Evaluation is often aimed at individual programmes and interventions, rather than the overall training and development function.*
- 5.3.8. *Little support from main stakeholders. Managers and other stakeholders often see evaluation as a nice-to-have rather than a must-have.*
- 5.3.9. *Evaluation is not focused on management needs. Evaluation data often focus on the learners' needs rather than on those of management.*
- 5.3.10. *Inconsistent use. Evaluation will not be taken seriously if it is used in an inconsistent way across different learning programmes.*
- 5.3.11. *No clear standards. No consistent standards exist for evaluation in terms of the process, methods and techniques.*
- 5.3.12. *Lack of sustainability. Evaluations tend to be short-term processes aimed at specific goals rather than strategic long-term processes.*