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From ideal into practice : an illuminative evaluation of a learnership in the insurance and investment sector.

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CHAPTER 2: REVIEW OF THE RELATED LITERATURE

2.1 Introduction

This Chapter begins with a brief discussion of South Africa as new democracy entering the global market and the challenges it faces in redressing issues and education and labour inequalities. An explanation follows of aim and purpose of learnerships an as evolved form of apprenticeships in South Africa. This discussion sets the scene for specific contextual issues. Section 3.4 examines some findings of research into 'Modern Apprenticeships' in the United Kingdom. This is followed by a review of the research into South African Learnerships in section 3.5. A review of the research on learnerships in South Africa follows in 3.6 to place and explain the value of this case study.

2.2 South Africa's New Democracy: Towards a Place in the Global Economy

In order to take its place in a globally competitive world, South Africa has chosen to embrace the new vocabulary which Barnett (1994) describes as characteristic of modern thinking; a new perspective emerging about learning and changes evolving in education and training in the world today.

> Notions of skill, vocationalism, transferability, competence, outcomes, experiential learning, capability and enterprise, when taken together, are indications that traditional definitions of knowledge are felt to be inadequate for meeting the systems-wide problems faced by contemporary society (p. 71).

South Africa's young democracy has been implementing a transformative agenda since 1994 through, among other initiatives, the introduction of the National Qualifications Framework (NQF), which is the means chosen to bring about change in the provision of education and training, 'to contribute to the full personal development of each learner and the social and economic development of the nation at large' (SAQA Act).

> Postmodernity has provided spaces for "hitherto oppressed and marginalised groups to articulate their own 'subjugated knowledges' and to empower themselves in a variety of different ways and according to their specific agendas.
>
> Usher, R., Bryant, I. & Johnston, R. (1997, p. 2)

Changes in South Africa: A timeline towards SAQA, the NQF and Learnerships

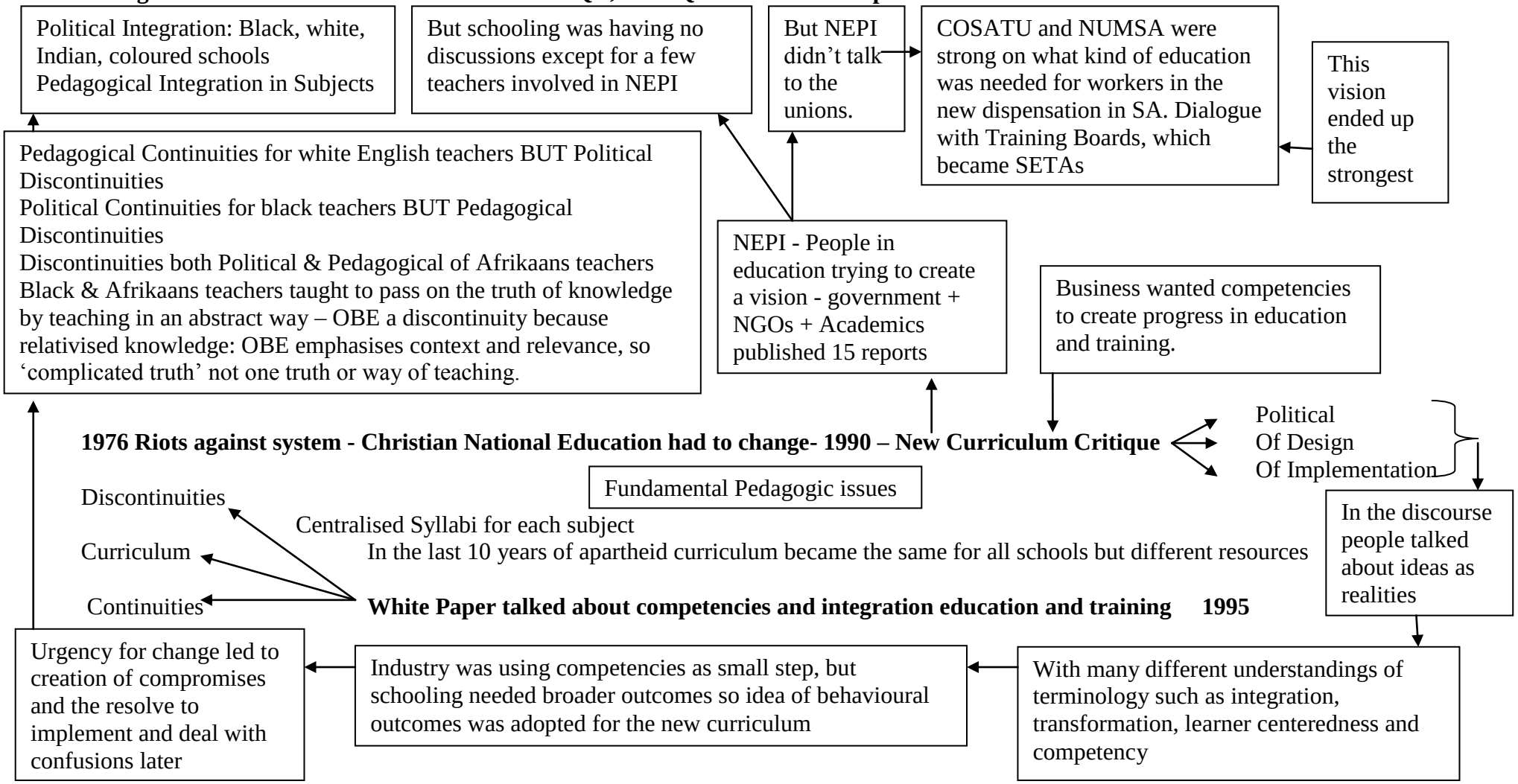

Table 1: Changes in SA – A timeline towards SAQA, The NQF and Learnerships

In the sense that the new political order had to counteract all that the previous regime had put in place to oppress, doing away with the existing educational system in favour of one providing opportunities for redress, the space Usher speaks about was created and made stable through new transformative legislation embracing OBE, CCFOs, and the articulation made possible via recognition of prior learning and the NQF.

But are the ideals of the NQF unreasonable? Can the tensions between the constraints of a postmodern economy and the ideals of redress meet successfully in the implementation of learnerships?

In his *Review of the NQF Project* report, Gary Granville of the Faculty of Education, National College of Art and Design, Dublin, Ireland, talks about identity and citizenship in the NQF and asks if it is an unreasonable mission.

> And yet herein lies the appeal of the NQF. It is the quality of mad, irrational and unreasonable fury within the NQF project that appeals. As the Irish playwright George Bernard Shaw wrote, 'The reasonable man adapts himself to the world: the unreasonable man persists in trying to adapt the world to himself. Therefore all progress depends on the unreasonable man'. So the NQF, by setting unreasonable high targets for itself, is a potentially significant vehicle for progress – or for disaster.
>
> (SAQA Report on the Review of the NQF)

According to Usher, et al. (1997), consumerism and a demand for a multi-skilled workforce, itself consumerist with a lifestyle-conscious outlook, prevails in post modernity. In this environment goods are not distributed according to need and the vulnerable are not protected. There is instead 'an increasingly fragmented and unequal core-periphery labour market where those without skills, cultural capital, access to information or market power can usually expect only a living and working existence on the margins' (Usher et al. (1997, p. 3).

In South Africa, according to Kraak (2005), job creation continues to lag behind both economic growth and the increase in the labour force. Multiple reasons for this phenomenon have been identified by Burger and Woolard (2005), who emphasise the

strong correlation with ongoing educational inequalities. South Africa, with its dual economy in post modernity has great and deep challenges regarding unemployment as well as un-employability. Here already the potential tensions between ideal and practice begin to become apparent. How do learnerships implementations shape up within these tensions?

2.3 Quality Education for Democratic Citizenship

South Africa's emerging conception of democratic citizenship, according to Enslin (2004), embodies active participation derived from the struggle against *apartheid.* The official version of democratic citizenship seems to indicate a citizen who is expected to hold an identity, which entails rights and duties, such as a commitment to the common good, and to contributing to debates and decision-making at national level as well as at local level. Our democracy highlights, as a constitutional founding principle, the equal enjoyment of an array of rights, which prominently includes socio-economic rights.

An understanding of democracy and citizenship rooted in adult education, according to Merriam et al, (1991), is that an informed, critical thinking citizenry is not sufficient, and that true democracy requires active participation, and that for a society to be democratic all members should have equal chance for socio-economic success.

Mattes (2002) sees the support for democracy in South Africa as lukewarm, with declining satisfaction with economic policy and political performance. He points to the disturbing trend that South Africans are inclined to rate socio-economic goods more highly as constitutive features of democracy than citizenship. For him the declining support for democracy can be attributed as much to the slow progress in the delivery of socio-economic goods in terms of which many understand democracy, as to the fact that 'the elite accommodation of the negotiated transition and the process of framing the constitution may be remote from the concerns of the poor' (Enslin, 2003, p. 79).

This resonates with the political discourse of access to socio economic goods and with Mattes' (2002) findings about democracy being perceived in terms of access to socio-economic goods.

It was observed in studying this learnership that Democratic Citizenship seems not to be directly addressed in most vocational qualifications in the insurance and investment sector, although the inclusion of some life skills unit standards, in some qualifications, does offer the facility for teaching this. The teaching of democratic citizenship also seems not to be on the agenda of employers and the external learning providers they contract, their focus being more oriented to business objectives.

In terms of democracy, the National Qualifications Framework (NQF) Impact Study looked at impact by evaluating stakeholder understanding of the NQF as a social construct, i.e. as more than merely a grid of levels on which qualifications can be registered, but rather as an agreement between democratic participants that can be re-negotiated as the South African context changes. The other research reviewed was not oriented to this aspect. My study looks at the extent to which education about democratic citizenship is embedded in the learning.

Two fundamental tools embedded in the new legislation on education and skills development, with the purpose of enabling transformation and promoting the delivery of 'a quality education for democratic citizenship', are Outcomes Based Education (OBE) and Critical Cross-Field Outcomes (CCFOs). OBE is the Department of Education's preferred method for teaching and learning. CCFOs are, according to SAQA decision 0204/96, 'critical for the development of the capacity for lifelong learning'. These were dealt with in chapter two, and CCFOs will be revisited in chapter four in the discussion about the instructional system of this illuminative evaluation. They form an integral part of this learnership; therefore asking the following questions is relevant:

- To what extent is education regarding democratic citizenship a part of learning in the learnership? Are learners postmodern consumers of education and socio-economic goods in the postmodern sense?

I have so far on this chapter explored the context in which learnerships as innovative forms or workplace learning find their political and socio-economic roots in our society. Next follows a closer look at the origins of learnerships and their characteristics.

2.4 From Apprenticeships to Learnerships: a New Concept in South Africa

South African learnerships are shaped by transformative education and skills development legislation in a new democracy. One overarching ideal, distilled from the legislation, is the provision of a quality education for democratic citizenship. This includes instilling the principles of lifelong learning, as well as providing access to economic participation (South African Qualifications Authority).

As was mentioned in Chapter one, Kraak (2005) emphasises that in the South African context, the intention of learnerships is to serve the needs of both streams in a dual economy, that is, to promote economic growth and at the same time reduce poverty and inequality by addressing access to education and employment opportunities. But, as South Africa takes its place in the globalising world economy, it also has to contend with postmodern socio-economic challenges. A predominant socio-economic feature of postmodernity, which impacts society as South Africa moves towards global competitiveness, is the growth of the service sector.

Learnerships in South Africa are intended to serve a number of purposes, for example, they lead to the attainment of a national qualification related to an occupation, they combine structured theoretical and practical learning components, they target youth as the beneficiaries (those under the age of 30), and principally the unemployed.

The first learnership in the insurance industry, according to the Insurance Sector Education and Training Authority (INSETA), was completed in 2004, but the process began in the mid 1990s with the proclamation of two acts of parliament:

- The South African Qualifications Act in 1998, which established the South African Qualifications Authority (SAQA), which in turn was tasked with developing the National Qualifications Framework (NQF); and
- The proclamation of the Skills Development Act in 1998. Chapter four of the Skills Development Act deals with learnerships. See Appendix K.

Smith et al. (2005) indicates that, like many other countries, South Africa reinvented the notion of apprenticeships during the mid 1990s, evolving them into learnerships. Kraak

(2005) elaborates that our concept of a learnership is similar to the 'Modern Apprenticeships' of Australia, Norway, Germany, New Zealand and the United Kingdom. However our learnerships are uniquely designed to address South African issues. A review of some criticisms of Modern Apprenticeships is dealt with in later in this chapter.

The similarities between apprenticeships and learnerships are, for example, that they culminate in a qualification, involve a fixed term employment contract, do not guarantee employment, include practical workplace experience and classroom based learning, and have a summative assessment.

Some differences between apprenticeships and learnerships are that while apprenticeships focus predominantly on practical job related skills, with some theoretical learning provided at formal educational institutions, learnerships combine theory and practice usually both delivered in the workplace and because they are based on a qualification designed according to SAQA rules the educational component is broader including mathematics, communication and workplace related soft skills such as in the case of this learnership, problem solving, assertiveness, and workplace ethics and computer skills. Whereas apprenticeships commonly related to the trades and assessment revolved around trade tests at an accredited site to qualify, learnerships are outcomes based and assessed against national unit standards combined in a qualification.

2.5 Criticism of Modern Apprenticeships Overseas

South African learnerships are very similar in concept to the apprenticeships in place in Germany, Australia and New Zealand, and especially close in design and structure to the Modern Apprenticeships currently in place in the United Kingdom. These apprenticeships are vocational, carried out in partnership with an employer and have, as components, a combination of theoretical classroom learning and a workplace experiential component of practice. A look at the findings of research into these apprenticeships overseas proved useful as a point of reference for examining

performance issues of our own South African brand of learnership as discussed in the next section.

According to Fuller and Unwin (2003), Modern Apprenticeships (MAs) in the United Kingdom have failed to achieve what was expected of them. Harris et al, (2003:83) indicate MA programmes in Australia have failed to provide integrated training models that ensure the 'complementarity of on-and off-job training'. While Keep (2000) maintains that in the United Kingdom the intended creation of public/private partnerships have not materialised as employers rely on the state to undertake the bulk of training rather than 'share the burden of training'. Payne (2002), and Fuller and Unwin (2003), agree that there are major reasons for scepticism over MAs, including, for example, uneven employer demand, commitment and engagement, and the existence of poor information about MAs because trainees move in and out of education, employment and MAs in varied and erratic ways.

In South Africa learnerships become the responsibility of the employer who is accountable for the provision of both theory and practice during the fixed term employment contract of the learnership, with the option to employ learners after completion. Payment of grants and refund of levies is made upon completion of the learnership. In the reporting an indication regarding numbers employed is requested by the SETA, but no medium to long term statistics are required regarding employment and retention. So whereas the learnership environment seems to be geared top offering a more natural and holistic provision of learning that takes learners from the periphery to mastery of work and culture at the centre, the employer's core expertise, it must be remembered, is not education.

This study sets out to investigate whether appropriately designed and implemented workplace learnerships can provide an apprenticeship-like environment closer to the type examined by Jordan's (1991) study of the Yucatec midwives, thus allowing 'newcomers' to experience the work environment as a learning environment. Yet as employees participating in all workplace activities including social interactions, they are also forming workplace relationships and assimilating the specific industry's language, norms and values along with its practices. Learners are building a new identity for

themselves. This evokes what Lave and Wenger say about optimum learning from a situated perspective.

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From a situated view, people learn as they participate and become intimately involved with a community or culture of learning, interacting with the community and learning to understand and participate in its history, assumptions, and cultural values and rules. Lave & Wenger, (1991); Fenwick, (2000)

2.6 Review of Research on Learnerships in South Africa

The South African scenario, in which learnerships are meant to be demand led, is proving to be not too dissimilar to the findings about Modern Apprenticeships in many respects, though in the South African context legislation directs organisations to play an increasing role as education provider, a role traditionally not core for most employers in the insurance and investment sector.

To measure the impact of the NQF on the transformation of education and training in South Africa, the South African Qualifications Authority (SAQA) embarked on a longitudinal, comparative study in March 2003. Report 2 in 2005 concluded that although it was still too early to make a definitive judgement on the level of impact (this only being possible after further data collection in 2007), the overall impact of the NQF at that point, was 'at least moderately positive'. (SAQA Bulletin, Feb. 2007). Although respondents often expressed concerns that adjustments to align to the NQF were unnecessarily bureaucratic, in most cases organisations benefited from them. A finding relevant to this study, though very general, is that workplace qualifications, learnerships and skills programmes were seen as relevant to the needs of employers. Of interest to this research is that the report 2 also notes SAQA's shift from the original intention to adopt an integrated approach to education and training. This shift has lead to numerous debates and even contestations, mostly because of a lack of a clear understanding of what is meant by an integrated approach. A number of commentators, such as Mehl and Jansen (SAQA 2004), note that the contestations between the two sponsoring departments, the Department of Education (DoE) and the Department of Labour (DoL), and the lack of a shared language, understanding and agreement are the result of the

decision not to have a single Ministry of Education and Labour in the post-1994 government.

Smith et al. (2005), using data from Jennings et al.'s, (2004) baseline survey, offer a critique of South Africa's attempts to transform apprenticeships. According to them a number of key challenges remain to be addressed, 'including a more equitable spread of learnerships across both spheres of the dual economy and strengthening the administrative and oversight capacity of SETAs' (Smith et al. 2005).

At a macro level, Smith et al.'s (2005) study reports high levels of satisfaction with learnerships by both learners and employers. However at present learnerships seem to be primarily serving the interests of the first economy, with two thirds of the study's sample coming from the accounting sector, for tertiary education level learnerships from conversions from existing programmes. There is evidence in the study that, due to a preoccupation with volume, rather than quality, as indicated in the National Skills Development Strategy success indicators1, those who are participating in learnerships come from sectors that traditionally have high numbers of apprentices rather than sectors that are important for growth of the South African economy. For example there were more learnership in the larger economic centres and fewer in rural areas where the need for entry-level employment in a variety of sectors was greater. Other findings indicated that Sector Education and Training Authorities (SETAs) differ enormously in capacity to co-ordinate learnerships and monitor the performance of learners.

The study, in line with others reported on the South African Qualifications Authority (SAQA, 2003), found that most SETAs have weak information and monitoring systems. Generally, findings indicated that:

- Additional support is needed by unemployed youth such as transport, accommodation, day care and allowances for learnerships to succeed.
- The immediate worksite experience was found to have a primary impact on the learnership for both the learners and managers. This aspect ties in with the research done in Australia by Harris et al. (2003) who found that: 'For

[1] The National Skills Strategy II document is at http://www.info.gov.za/otherdocs/2005/skillstrategy.pdf

apprentices, the on-job site was the benchmark for determining relevance and hence the complementary nature of the environments' (p.89).

At the micro level, lessons learnt from a study (Davies & Farquharson, 2004) of KZN Pilot Projects highlights the need for broader stakeholder consultation and clarification of stakeholder roles and responsibilities, as well as better contract management and more effective management of learner monitoring processes.

Babb's (2004) case research of the 'Letsema' learnership project in the banking sector proposed further research into a 'Factor Model of Learnerships', to explore various identified factors capable of helping or hindering learnerships. These were found to be:

- The Learnership Objectives and Outcomes
- The Learning Process:
    - Offsite component – theoretical learning
    - Challenge and value of the work in the worksite component
    - Feedback and support, confidence and commitment
- The Learning Context:
    - Mentors, coaches, work colleagues - encounters and relationships with people at work
    - Employment prospects
- The Learner

Most of these factors appear to be relevant in this learnership study as well.

One of the major challenges of learnerships in the insurance and investment sector is to provide a complementary learning environment, as well as a purposeful setting for learning that is problem centered, producing work, while at the same time meeting the transformative ideals of the legislation in providing a quality education for democratic citizenship, which in the reduced sense explained earlier in this discussion, translates mostly into economic participation.

2.7 Conclusion

All the reviewed research suggest learnerships provide valuable opportunities and have been experienced as beneficial, but have areas of weakness necessitating further study.

Yet none of the research examined has studied learnerships closely as they unfold in their individual contexts. These studies give a general overview of learnership effectiveness and challenges, having examined learnerships after their completion by looking at data related to achievement or completion and by interviews with participants in relation to perceived benefits and challenges. Their general nature aims for insight at a conceptual level of transformation, as does the NQF Impact Study. My research follows a more detailed and context specific approach (see chapter 4.)