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

Sosznianin, Tatiana

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CHAPTER 6: FINDINGS

6.1 Introduction

In this chapter the findings of this study are summarised and connections to the theories are developed. A discussion of the findings in relation to each research question follows. The chapter concludes with a reflection on the experience of applying illuminative evaluation in this study.

6.2 Summary of the Findings

Analysis of the data gathered in this study revealed the following findings:

- Significant learning took place in activities outside the prescribed material and processes, in extracurricular interventions offered at the discretion of the workplace organisation.
- The organisation's recruitment policies conflicted with 'access' to entry-level employment, one of the major objectives of learnerships.
- This entry-level qualification's curriculum was broad, providing general knowledge of various aspects of the industry. There seemed to be a mismatch to job-specific knowledge and mentors were not prepared with a development programme to teach these job specific knowledge and skills in the different areas where learners gained workplace experience.
- There was insufficient information given to department managers and mentors regarding the learnership and the skills, or gap in skills, the learners were bringing with them to the workplace and no mentoring plan designed.
- There was no Mentor training or preparation.
- The impression was given that learners they could provide work at no cost.
- In the Coat of Arms exercise, learners revealed a focus on access to goods and services, not necessarily through employment with the organisation.
- The vast majority saw this future in terms of socio-economic achievement. They depicted a near future where they drove a 'Yaris' for example; they saw themselves owning one and sometimes two businesses (not working for someone else), and they visualised a future with a happy family, (spouse and children),

lived in quality homes and enjoying a gratifying lifestyle filled with holidays, entertainment and so on.

- The learnership curriculum and the qualification it leads to have no content that directly teaches democratic citizenship and from the observation above, learners were quite focused on the acquisition of economic goods at a micro level. In a broader sense the learnership content did expose learners to issues of economics, responsible management of finances, preparation for retirement, an awareness of current affairs, business ethical behaviours, productivity, assertiveness, communication skills and managing relationships at work. All of these can be said to be develop human potential and so enable better participation in the society, which is an aspect of democratic citizenship.
- The qualification was not intended to be job specific as, for example, in the case of IT programme testing or Claims processing or Finance, but depending on the mentor, transfer of job specific knowledge, skills and attitudes was possible and learners were very successful in certain workplace areas.
- The analysis of the learnership's theoretical component and workplace experience component demonstrated the successful application of OBE methodology and that CCFOs were integrated in the learning with evidence of learners being able to demonstrate these abilities.

6.3 Connections between the Findings and the Major Theories, Experiential Learning, Tranformative Learning and Situated Learning Theory, and a short note about Mentoring

With regard to experiential learning theory the study was able to answer the two questions posed in chapter three in the positive.

1. Can Brookfield's four components of critical thinking: identifying and challenging assumptions; recognising the influence of context on thoughts and actions; considering alternatives to existing ways of thinking and living; and developing reflective scepticism be identified in the learning?
2. Are facets of transformative learning: a triggering event; imbalance; articulation of unconscious assumptions: questioning; constructive discourse; revision; and planning a course of action, evident features in the learning?

If we remind ourselves that Kolb (1984) conceives that 'to learn' involves the integral functioning of the whole person, meaning their thinking, feeling, perceiving and behaving, and we look at the insights gained from observations on classroom learning of which the most demonstrative samples have been included in this report, we begin to see experiential learning theory in action.

If we add to this the notions of reflection-in-action (thinking on our feet), and reflection-on-action, so central to Schön's (1987) later work, then we see not only from observed classroom discussions, but also from learners' evaluations of situation and events as expressed in their interviews that they were indeed looking at their experiences, connecting with their feelings, and attending to their theories in use and building new understandings to guide their actions in situation as they were unfolding.

But the study also showed Mezirow's (1981) transformative learning theory reflected in the valuable dialogue with others in a variety of learning situations in the classroom and in the workplace. Learning towards a vocational qualification and mastery of a job role in the workplace brought learners in contact with unfamiliar situations, where they were expected to integrate new and different ways of thinking about work and life. This entailed some perspective transformation, and involved a degree of critical reflection, which Brookfield (1987) describes as a process leading to our being ready to act and think differently. In this study this included opportunities for discussions with peers and facilitators as well as co-workers and representatives of the organisation able to impart norms and values. Transformative learning is a part of the process where new identities are developed, as they are also developed in a community of practice with its socialising elements. In the case of this study, this included opportunities for discussions with peers and facilitators as well as representatives of the organisation able to impart norms and values. In discussions where learners had the opportunity to examine their existing frame of reference and were confronted with the prerequisite disorienting dilemmas, for example, as in the lesson on workplace ethics, the environment conducive to transformation of identity was facilitated. This is particularly important when the goal of learning is to effect profound change in the learners' ways of thinking and doing, as is the case in learnerships.

With regard to the actual teaching activities analysed, Vella (2000), who drew heavily on the work of Kolb (1984) while she developed theoretical underpinnings for the creation of workshops for adult learners, indicates that any effective design for experiential workshops has to have four components:

- A learning task that connects learners with what they already know and with their unique context;
- A learning task that invites them to examine new input (concepts, skills, or attitudes) — the content of the course;
- A learning task that gets learners to do something directly with that new content, somehow implementing it; and
- A learning task that integrates this new learning into their lives.

The analysis of the classroom observations, some samples of which were placed in the report or in the appendix reveals that classroom learning activities did reflect the four components above.

Getting back to Situated Learning Theory and learning in 'communities of practice' from Lave and Wenger's (1991) work describing a model for understanding learning in apprenticeships or as a newcomer in a situation, which they deem a 'community of practice', they argue that situated learning involves the whole person. This implies not only a relation to specific activities, but also a relation to social communities. It implies becoming what they term 'a full participant, a member, a kind of person…' Thus as an expression of identity, (Wenger, 1998) 'learning entails both a process and place…' (p. 215). This study was particularly illuminative of learning in the workplace being just this: situated learning in a community of practice. Many comments from mentors and the learners themselves richly described not only the organisation itself as a community, but each department as micro communities with unique characteristics into which the learner had to integrate. Therefore the two questions asked in chapter 3 regarding the connection between the learnership and situated learning in communities of practice were answered in the positive.

1. Does the learnership provide such a community, a process and a place?
2. In the workplace, as site of learning, do learners encounter tensions between expressing individual diversity against the need for assimilating a corporate

identity? Are such individuals, who are able to cope with the demands of the post-modern, likely to emerge from learnerships as communities of practice?

3. Are learnerships such communities of practice affording learner's opportunities for dialogue, space for transformative learning, the transfer of knowledge and skills and the development of workplace identities?

With regard to mentoring, Billet (2003) talks about factors that are important for mentoring to be an easier and more fulfilling role for mentors:

- Informing learners about the mentoring process to allay concerns;
- Adequate preparation time for mentors;
- Provision of time to conduct the role;
- Support in its conduct; and
- Acknowledgement of mentor's role and contribution.

The two questions defined in chapter 3 regarding mentoring were:

1. What impact did mentoring have in the learnership? What factors helped or hindered the effectiveness of the mentoring?
2. What is the quality and impact of mentoring in the learnership?

Mentoring had a big impact on the learnership in terms of inequality of learners' workplace experience and work readiness preparation. Factors that hindered the effectiveness of mentoring were mentor training and preparation and communication to mentors regarding the learnership, its purpose and what learners were bringing to the workplace in terms of industry and job related knowledge and skills. There the quality of mentoring was varied, with some learners having a positive, and others a negative experience, which also impacted on mentors' and managers' willingness to consider employing learners at the completion of the learnership.

6.4 What Factors in the Milieu influenced Learning and the Acquisition of the Qualification?

Findings that address this research question are well illuminated with comments from the interview with the learnership manager.

In a final discussion with the learnership manager I had the opportunity to talk about some of the emerging themes from the data being analysed, those themes that seemed most urgently in need of some action. We discussed, for example, the issue of pre-employment testing and the weight that test results has in the decision to employ or not, versus reported quality of performance and integration learners had achieved within their workplace teams.

We also talked about the influence the quality of mentoring and mentor preparation had on the success of the workplace experience for both the learner and the mentor. These are some of the comments the learnership manager shared with me regarding possible ways to deal with this.

With regard to the mentoring theme below, some of her comments follow.

- There was no mentor preparation.
- Learners were not introduced as learners but a general impression was given that they could provide work at no cost.
- There was insufficient information given to department managers and mentors regarding the learnership and the skills or gap in skills the learners were bringing with them and no mentoring plan designed.
- Many mentors received information second or third hand because the HR person had spoken to the manager who spoke to someone else and before mentors received details, information was lost along the way.
- Some mentors were approached because of their managerial or supervisory training but most of them didn't have any information about what it is to be a mentor.

> Tatiana these comments it feels as if apart from other obstacles the tests, that if we had a better mentorship/coaching thing in place more people could have been employed.
>
> Maybe we should reintroduce, you know a couple a years ago we had on a weekly basis meetings with the protégé and meetings with the mentor and then a meeting with the protégé and the mentor together, at first we did it once a week and later every two weeks and so on. It pays off because, you are playing the connection, and you are pulling it together. And if somebody is too busy for that and then we appointed a new mentor. Those who are too busy would stick the learner in a corner. From these meetings a lot of additional training needs came out, because I always asked the manager what does the learner need to look like or have to be able to employ them they are quite quick to tell us. And you must just make sure the learner has that.
>
> HR can still nominate the people in the areas but then after that we must go in there, and if necessary we must organise a training session for the mentors.

Regarding the testing as a barrier to employment, this comment encapsulates the organisation's approach and sheds some light on internal dynamics of problem solving.

> Tatiana, I am just asking if they (learners) can do the job and they impressed people then that shouldn't be a barrier to employment. The situation I had with this PS 200 test is that B (the person who led the ethics unit standard session with learners) didn't do well in. She was with us on a contract. She is now at Standard Bank. What happed with her is she went for an interview and they saw the potential we saw here, but we could not employ her unless she passed the tests. I got the line feedback but they ignore the line feedback because they focus on the tests. She called me from there to say they wanted her to see the psychologists from Wits for four hours of psychometric assessment, I was biting my nails because the major thing on this side for her was the test questions on integrity showed she's got no integrity, she's got no values and therefore we cannot employ her. And the assessment at Standard Bank they assessed integrity and they fell over their feet to employ her. So what's wrong? Now with these situations with learners on this learnership we blew the whistle on the PS 200 and they are coming here tomorrow, it's a big thing for the company to admit. They will explain how the test works, and who signed it off, I don't care about that I care about what I see and there is B's living example.

Regarding the ELSA Scanner communication (English) assessment this is her response when we discussed the specific situation of learner T, whose mentor wanted to be employed, but who did not have the time to do further computer training (40 hours) before being retested.

> And P (HR Manager) is saying we will not lower the standards of the company because I want the standards lower. That's not what I am asking. I am saying you have no right to discriminate against this guy based on his language ability and that language is not a requirement, because he can perform the job. There is no other reason it just the language. And now the HR people are upset with me because they think he (the learner) needs to spend so many hours on the training.

6.5 What aspects of the Instructional System (Outcomes-Based Education ((OBE)), Critical Cross-Fields Outcomes ((CCFO)), and Qualification Outcomes) shape Learning and Teaching in the learnership?

In Relation to OBE

It can be said from this illuminative evaluation that, at least in the realm of workplace education and training in the insurance sector, OBE has had a positive contribution to make. The qualifications (designed by an educational expert, with the input of industry subject matter experts, approved by the Financial Services Board as meeting

the requirements for licensing necessary to work and delivered according to the OBE principles of focusing on assessment using backward design), has produced good learnership graduates whom mentors and managers were keen to employ.

So at this level the learnership seems to have achieved good success, even if it did not follow Spady's (1994) philosophy always well, that OBE 'means starting with a clear picture of what is important for learners to know and be able to do, then organizing the curriculum, instruction, and assessment to make sure this learning ultimately happens' (p.1).

On the other hand the learnership's content seems to mismatch with job specific knowledge and skills, being too broad in scope. Where mentors were not prepared with a development programme to teach job specific skills the learnership can be said not to have met the requirements of OBE in that some were unable to demonstrate skills, knowledge, insights, values and attitudes (addressing the four proofs of learning from David Kramer's adaptation of the *(sic)* facets of understanding from McTighe and Wiggins's (1985) understanding by design.

The organisation's own recruitment policies conflicted with 'access' to entry-level employment

Here is a comment made by the learnership manager in this regard to testing:

About Te at Funds at Work:

> Tatiana, I have an issue with that and I have taken it up with the HR. I have an issue with that because this little guy is doing a good job and they are using a requirement, which is not a requirement for that job. I told her yesterday the every job has a different language requirement. The requirement where he is not the same otherwise he wouldn't be doing a good job. And Philip is saying we will not lower the standards of the organisation because I want the standards lower. That's not what I am asking. I am saying you have no right to discriminate against this guy based on his language ability and that language is not a requirement, because he can perform the job. There is no other reason it just the language. And now she (HR person) is upset with me because she is saying he needs to spend so many hours on the training.

And regarding V's position:

> But there again what Ph is saying is that, if they don't make the grade for permanent employment, they are not to be given a contract. What I am saying is you have someone who has already proved they can do the job well and you keep them out when we are almost there and you bring a new person from the outside think its against it is against the equity act.
>
> Tatiana, I am just asking if they can do the job and they impress people, then that shouldn't be a barrier to employment. The situation I had with this PS 200 is that 'B' didn't do well in. She is now working at a one of the major banks. What happened with her is she went for an interview and they saw the potential we saw here but we could get past the tests. I got the line feedback but they ignore the line feedback because they focus on the tests. She called me from there to say they wanted her to see the psychologists from Wits for four hours of psychometric assessment; I was biting my nails because the major thing on this side was that she's got no integrity, she's got no values and therefore we cannot employ her and the assessment at that bank they assessed integrity and they fell over their feet to employ her. So what's wrong? We blew the whistle on the PS 200 and they are coming here tomorrow; it's a big thing for the company to admit. They will explain how the test works, and who signed it off. I don't care about that, I care about what I see and there is 'B' a living example.
>
> What I want to do with this new learnership is… they want grade 10 English – it's very high - this is hard to get, so I am saying bring down to grade 8 but build into the learnership the ELSA computer training, and then bridge that because remember the learners must do that current events unit standard so you can link with something like the research project where they have to spend time even if it's an hour extra a week to read things and give you feedback. This can fit easily in this learnership, which is at NQF level 4 because they have to do research where you interpret what you've read; maybe we need to put more emphasis in the assessment of that.
>
> We will ensure that with the next learnership we start early with the computer based training programme for the ELSA Scanner as part of the learnership, say two hours every two days.
> Another thing is to add a dimension to the SA Finishing School of Business. For them to give them learning skills in terms business English, you need to improve your language and structure it a bit more. Maybe set the learners a reading programme, for example, give them two books and magazines to read in the three months of theory.

This mention of the South African School of Business needs an explanation here. It was not part naturalistic observations, nor of document analysis. Yet learners at interviews mentioned it often and in a positive way. The SA School of Business was brought in by the employer organisation, as an additional learning resource for the learners on this learnership. It did not form part of the requirements of the learnership

and represented an extra investment on the part of the employer. The SA School of Business offered additional 'soft skills' training such as conflict handling, assertiveness, time management, work etiquette, etc. As is the nature of illuminative evaluation to bring forth unexpected data, it became relevant when many learners found they actually used the skills gained during the training when they were in the workplace and reported positively on their usefulness in helping cope with the new work environment.

In addition to the employer's recruitment policies becoming a barrier to employment, the structure of the learnership delivery itself does not encourage employment and retention. The employment contract is for the duration of the learnership, with no obligation to employ and no further incentive to encourage employment. In fact, in discussions with the learnership manager at the Insurance Sector Education and Training Authority (INSETA), it became clear that there is no current requirement for reporting on the retention of workers who enter the workplace as a result of completing learnerships successfully. In response to questions asked of a representative from the Department of Labour, he was in agreement that they do need to track placements and retention, and it is something they are building into their management information system over the next few years.

6.6 In what ways does the Learnership provide a Quality Education for Democratic Citizenship?

In the Coat of Arms exercise the vast majority of learners talked about their future in terms of socio-economic achievement. The qualification contains no content that directly teaches democratic citizenship, so it cannot be claimed that it directly provides a 'quality education for democratic citizenship. However, in a broader sense of defining democratic citizenship as access to economic participation, the learnership content did expose learners to issues of economics, responsible management of finances, preparation for retirements, an awareness of current affairs, business ethical behaviours, productivity, assertiveness, communication skills and managing relationships at work. All of these can be said to lead to the development of human potential and so enable better participation in the society. A large number of learners were also employed by the organisation, thus it can be said that in these

ways, by providing access to economic participation a level of democratic citizenship was also achieved. The learnership was successful in learners acquiring industry knowledge and job competence, as well as an understanding of what economic participation means and entails in terms of roles and responsibilities at work and towards colleagues, for example ethical workplace behaviour, conflict handling, productivity and so on. In this narrower sense the learnership did provide a quality education for democratic citizenship.

6.7 Reflection

I enjoyed this illuminative evaluation research project for the opportunity it provided me to become albeit in a restricted manner, quite close to the role players, so allowing me to share and have insight into their experiences at an intimate level of understanding.

The most daunting aspect of this study has been the sheer volume of data generated, to the point of generating an initial paralysis when confronted with the analysis, the sorting, selecting and sadly, discarding of information.

The most important aspect was the relationship of mutual trust and respect with learnership role players, but especially with the learnership manager, which created a space for open and honest dialogue around difficult and sensitive issues. The acceptance of what might have been seen as criticisms when discussing some of the emerging themes was humbling and rewarding.

Getting to know and understand a little about these young people so outside the normal sphere of contacts and to appreciate their willingness to try hard, their insight, humour, and impressive ability to articulate their views and feelings was a pleasure and an honour.

Appendices

APPENDIX A: LEARNERSHIP ROLE PLAYERS

	Learner (Pseudonym)	**Mentor (Pseudonym)**	**Department**
1	Ph (F) (Not Employed)	Sha / Phe	Claims / Legal
2	Mu (F) (Employed)	Sh	Claims
3	Muk (M) (Not employed)	Zen	New Business
4	Teb (M) (Not employed)	Zen	New Business
5	Le (F) (Employed)	Ke	Fast Lane
6	Kee (M) (Employed)	Jnt	Information Technology
7	Ze (M) (Employed)	Mf	Wealth
8	Tl (F) (Left)	Mf	Wealth
9	Bon (F) (Employed)	Mf	Wealth
10	Kt (M) (Employed & dismissed)	Mf	Wealth
11	Te (M) (Employed)	Th	Funds at Work
12	Ketl (F) (Not employed)	Hz	Funds at Work
13	Virginia (F) (Not employed)	Ka	Funds at Work
14	Kab (M) (Not employed, died 2009)	I	Corporate /Skills Dev
15	Mav (F) (Not employed)	Br	Corporate / Mailroom
16	Sel (M) (Employed)	Sin	HR / Wealth
17	Pum	Permanent	Health
18	Rt	Permanent	GSU Call Centre
19	Po	Permanent	Funds At Work
1	Lu (F) (Employed)	Sy	Lekana
2	Sim (F) (Employed)	Ga	Lekana
3	Mi (F) (Employed)	Hap	Lekana
1	J	Learnership Manager 1	Momentum
2	I	Learnership Manager 2	Momentum
1	Na	Facilitator 1	Plumbline
2	Tr	Facilitator 2	Plumbline

APPENDIX B: UNIT STANDARDS TAUGHT IN THE THEORETICAL COMPONENT OF THE LEARNERSHIP

Learnership ID 13Q 1300033 99 120 3 - Curriculum leading to the National Certificate: Financial Services, SAQA ID 49089.

Index: C= Core unit standard E= Elective unit standard
F= Fundamental unit standard Com= Communication unit standards
Math= Mathematics unit standards IT= Additional IT unit standards

Theme	Unit Standard	Date trained	Unit Standard Title	Credits
		1 June	Learnership Starts: Orientation and Teams	
Theme1	119681	4 June	Research cost associated with birth marriage etc	4 F
Managing own life	119915	6 June	Manage personal expenditure	3 F
	119913	11 June	Use a personal budget to manage own money	3 E
	114960	13 June	Investigate the need to provide for own retirement	3 C
	114970	18 June	Manage risk in own life	3 C
Theme2	8986	21 June	Research history of financial services industry in SA	10 C
Insurance legislation	113904	28 June	Money laundering legislation	2 C
	113918	2 July	Explain the Financial Advisors Intermediaries Services Act	2 C
Theme3	117125	4/5 July	Interpret currant affairs related to business sector	10 C
Insurance past and present	113922	12 July	Explain structure of financial services industry in SA	3 C
	114962	16 July	Investigate structure of financial services workplace	3 C
	117146	23 July	Indicate the scope of life insurance in SA	4 E
	114983	25 July	Describe life insurance	3 E
Theme 4	114985	30 July	Different needs different products	4 C
Products	8990	01 August	Describe collective investment schemes	2 E
	114964	06 August	Short term Insurance	3 E
	114972	08 August	Describe health benefits administration in SA	2 E
	13 August	114956	Funeral insurance	2 E
Theme 5	16 August	113924	Apply business ethics in a work environment	2 C
Business Skills 1	20 August	114943	Describe how to manage workplace relationships	2 C
	22 August	117171	Mange time effectively to enhance productivity	2 C
	27 August	114974	Apply basic skills of customer service	2 C
	29 August	114952	Apply problem solving techniques to solve problems	2 C
	03 September	119914	Identify ways of improving work prospects	3 F
Theme 6 IT	09 September	114984	Manage electronic mail in a business environment	2 C
Business Skills 2	12 September	114979	Operate a computer workstation in a business environment	2 C
	11 September	114978	Use word processing package to produce business documents	3 E
Not in Qual	10 September	114981	Capture numerical & text info. on an electronic database	3 IT
Not in Qual	13 September	114980	Use a presentation package to produce business documents	5 IT
Not in Qual	14 September	114975	Use a web browser in a business environment	2 IT
			Additional IT unit standards	**10**
			Fundamental	10
			Core	54
			Electives	22
			Sub total	**96**
			Communication	20
			Mathematics	10
			Total Credits	**126**

APPENDIX C: LEARNERSHIP CALENDAR FOR THE THEORETICAL LEARNING COMPONENT

L3 Learnership: June 2007

Resource for week	*Sunday*	*Monday*	*Tuesday*	*Wednesday*	*Thursday*	*Friday*	*Saturday*
					31 Final venue check Prepare info for Amazing Race	1 **LEARNERSHIP STARTS - Welcome & Orientation**	**2**
Va Na	**3**	4 **THEME 1** Research costs (4) **119681** **(Va)**	5 Research costs (4) **119681** **(Va)**	6 Personal expenditure (3) **119915** (Na)	7 Personal expenditure (3) **119915** (Na)	8 Assignments	**9**
Va Tr	**10**	11 Personal budget (3) **119915** **(Va)**	12 Personal budget (3) **119915** **(Va)**	13 Provide for retirement (3) **114960** **(Tr)**	14 **NK depart**	15 Assignments	**16**
Tr Va	**17**	18 Manage risk in own life (3) **114970** **(Tr)**	19 Manage risk in own life (3) **114970** **(Tr)**	20 Amazing Race & Celebration	21 **THEME 2** Research history (10) **8986** (Va)	22 Research history (10) **8986** (Va)	**23**
Va	**24**	25 Research history (10) **8986** (Va)	26 Research history (10) **8986** (Va)	27 Research history (10) **8986** (Va)	28 Money Laundering (2) **113904** **(Va)**	29 Money Laundering (2) **113904** **(Va)**	**30**

L3 Learnership: July 2007

Resource for week	*Sunday*	*Monday*	*Tuesday*	*Wednesday*	*Thursday*	*Friday*	*Saturday*
Tr	**1**	2 FAIS (2) **113918** **(Tr)**	3 FAIS (2) **113918** **(Tr)**	4 Assignments/ Half day Off	5 **THEME 3** Interpret current affairs (10) **117125** **(Tr)**	6 Interpret current affairs (10) **117125** **(Tr)**	7 **VW depart**
Tr Na	**8 NK return**	9 Interpret current affairs (10) **117125** **(Tr)**	10 Interpret current affairs (10) **117125** **(Tr)**	11 Visit to MINT	12 Fin Services Industry **113922** (3) **(Na)**	13 Arrange interviews in workplace	**14**
Na	**15**	16 Fin Services w/place (3) **114962** **(Na)**	17 Fin Services w/place (3) **114962** **(Na)**	18 Assignments	19 Outing / day off	20 Day off (Assignments @ home)	**21**
Tr Na	**22**	23 Scope of Life Ins. in SA (4) **117146** **(Tr)**	24 Scope of Life Ins. in SA (4) **117146** **(Tr)**	25 Describe life insurance (3) **114983** **(Na)**	26 Describe life insurance (3) **114983** **(Na)**	27 Assignments	**28**
Tr	**29**	30 **THEME 4** Different needs (4) **114985** **(Tr)** **Theme 3 Celebration lunch**	31 Different needs (4) **114985** **(Tr)** **Theme 3 Celebration lunch**				

VW return

L3 Learnership: August 2007

Resource for week	*Sunday*	*Monday*	*Tuesday*	*Wednesday*	*Thursday*	*Friday*	*Saturday*
Tr				1 Collective inv schemes (2) **8990** **(Tr)**	2 Collective inv schemes (2) **8990** **(Tr)**	3 Assignments	
Va Tr	**5**	6 Short-term insurance (3) **114964** **(Va)**	7 Short-term insurance (3) **114964** **(Va)**	8 Healthcare benefits (2) **114972** **(Tr)**	**9** **Public Holiday**	10 Day off	**11**
Va Na	**12**	13 Funeral insurance (2) **114956** **(Va)**	14 Funeral insurance (2) **114956** **(Va)**	15 Assignments/ outing	16 **THEME 5** Workplace ethics (2) **113924** **(Na)**	17 Workplace ethics (2) **113924** **(Na)**	**18**
Na	**19**	20 Workplace relationships (2) **114943** **(Na)**	21 Workplace relationships (2) **114943** **(Na)**	22 Time Management (2) **117171** **(Na)**	23 Time Management (2) **117171** **(Na)**	24 Assignments	**25**
Va	**26**	27 Customer service (2) **114974** **(Va)**	28 Customer service (2) **114974** **(Va)**	29 Problem solving (2) **114952** **(Va)**	30 Problem solving (2) **114952** **(Va)**	31 Assignments	

L3 Learnership: Sept 2007

Resource for week	*Sunday*	*Monday*	*Tuesday*	*Wednesday*	*Thursday*	*Friday*	*Saturday*
							1
Va Na	**2**	3 Employment prospects (3) **119914** **(Va)**	4 Employment prospects (3) **119914** **(Va)**	5 Finalise all assignments	6 Celebration	7	**8**
	9 **IT unit standards**	10 IT unit standards	11 IT unit standards	12 IT unit standards	13 IT unit standards	14 IT unit standards	**15**
	16 **IT unit standards**	17 IT unit standards	18 IT unit standards	19 IT unit standards	20 IT unit standards	21 IT unit standards	**22**
Na Va Tr	**23** ***Celebration of study school in this week before learners go to workplace***	24	25	26	27	28	**29**

Total US trained per facilitator: TT = 8
VW = 9
NK = 7 + admin/client liaison

APPENDIX D: THE SOUTH AFRICAN FINISHING SCHOOL OF BUSINESS PROGRAMME SCHEDULE

THE SOUTH AFRICAN

FINISHING SCHOOL OF BUSINESS

PROGRAMME SCHEDULE

COMPANY: _____

PROGRAMME: Preparation for Success 2007

Intervention	Date	Time
Pre-Course Assessments	25/09/2007	09 :00 – 16:00
	27/09/2007	09 :00 – 16:00
Workshop	04/10.2007	09:00 – 16:00
Business Etiquette	11/10/2007	09:00 – 16:00
Assertiveness and Communication	18/10/2007	09:00 – 16:00
Time Management	25/10/2007	09:00 – 16:00
Team Work and Time Management	01/11/2007	09:00 – 16:00
PGC	14/11/2007	09:00 – 16:00
	15/11/2007	09:00 – 16:00

APPENDIX E: CRITICAL CROSS-FIELD EDUCATION AND TRAINING OUTCOMES

DECISION: SAQA 0204/96

It was decided that the term 'Critical Cross-Field Education and Training Outcomes' (Short Title: Critical Outcomes) would be adopted instead of 'Essential Outcomes', and that these would be applied in the following context:

In order to enable SAQA to proceed with the creation of an NQF, SAQA and its work in the development of the NQF aims to facilitate the democratic transformation of the national education and training system into one which serves the needs and interests of all the people of South Africa and upholds their fundamental rights. Through the creation of an integrated national framework for learning achievements, SAQA ensures the facilitation of access to, mobility and progression within education and training and career paths.

Furthermore it ensures the enhancement of the quality of education and training, the acceleration of redress of past unfair discrimination in education training and employment opportunities, thereby contributing to the full personal development of each learner and the social and economic development of the nation at large.

This vision intends that all qualifications, and hence learning programmes and unit standards, should give attention to the critical outcomes, since they are critical for the development of the capacity for lifelong learning.

Clearly it is not appropriate to address all critical outcomes within a single unit standard. However, it may be possible to incorporate one or more of the critical outcomes in specific outcomes and assessment criteria.

Writers of unit standards should have the Critical Outcomes at hand and try to accommodate them when constructing unit standards without creating an artificial situation. The Critical Outcomes that are given attention within a unit standard should be highlighted within the 'Notes' category of the unit standard.

At registration, proposers of qualifications must ensure that all Critical Outcomes have been addressed appropriately at the level concerned within the proposed qualification. Should any critical outcome not be incorporated, proposers of the qualification will be required to justify the exclusion to the satisfaction of SAQA before the qualification is registered.

The following are Critical Outcomes that can successfully be embedded within unit standards:

1. Identify and solve problems in which responses display that responsible decisions using critical and creative thinking have been made.
2. Work effectively with others as a member of a team, group, organisation, and community.

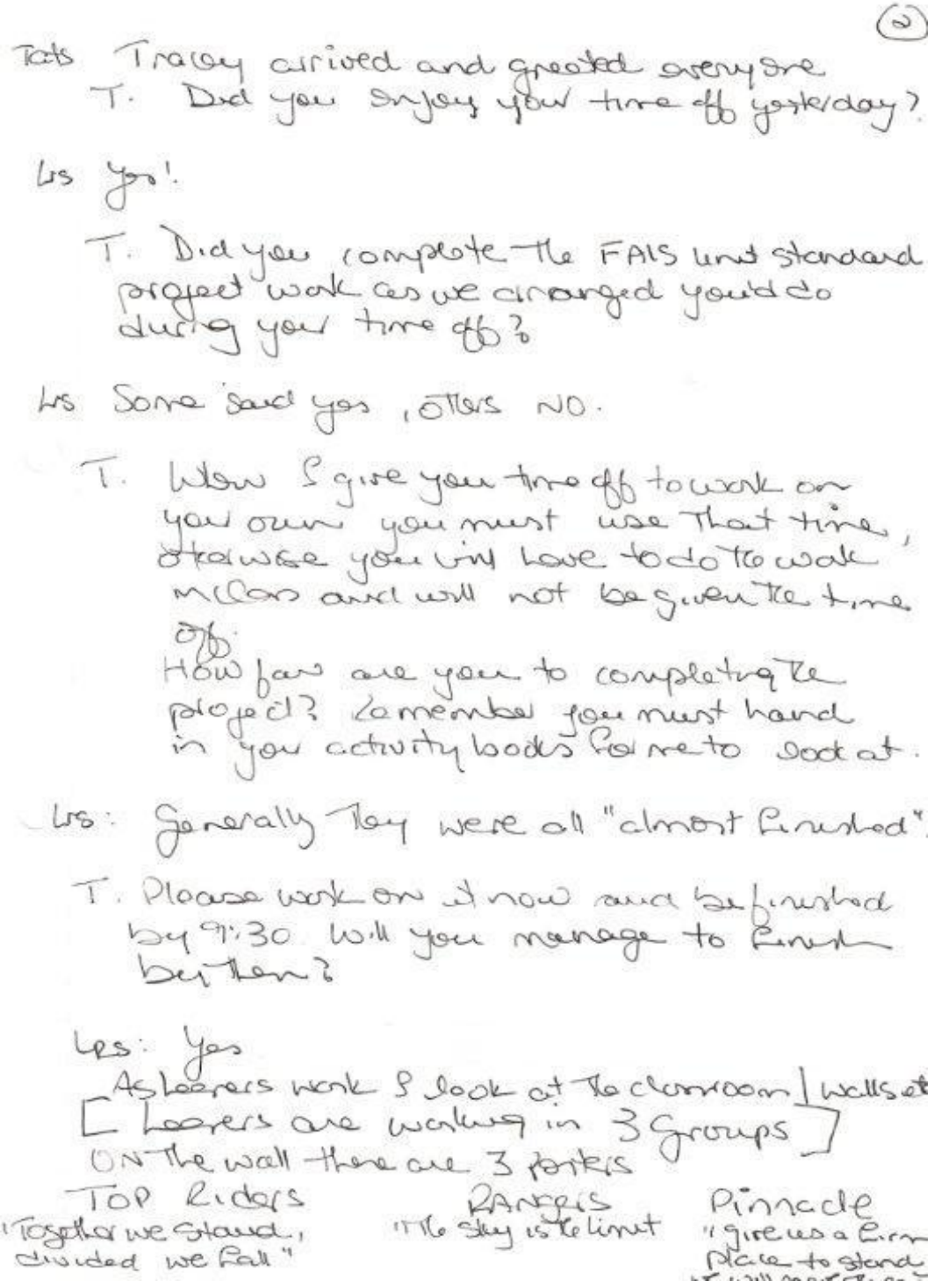
3. Organise and manage oneself and one's activities responsibly and effectively.
4. Collect, analyse, organise and critically evaluate information.
5. Communicate effectively using visual, mathematical and/or language skills in the modes of oral and / or written presentation.
6. Use science and technology effectively and critically, showing responsibility towards the environment and health of others.
7. Demonstrate an understanding of the world as a set of related systems by recognising that problem-solving contexts do not exist in isolation.

In order to contribute to the full personal development of each learner and the social and economic development of the society at large, it must be the intention underlying any programme of learning to make an individual aware of the importance of:

1. Reflecting on and exploring a variety of strategies to learn more effectively;
2. Participating as responsible citizens in the life of local, national and global communities;
3. Being culturally and aesthetically sensitive across a range of social contexts;
4. Exploring education and career opportunities, and
5. Developing entrepreneurial opportunities.

APPENDIX F: SAMPLE OF NATURALISTIC OBSERVATION SHEETS AND TRANSCRIPTS

Naturalistic Observation Sheet
4 July 2007, 8:30 AM
Braams Room
Sheets, 2, 3, 4



(2)

Tats Tracey arrived and greeted everyone
T. Did you enjoy your time off yesterday?

Lrs Yes!

T. Did you complete the FAIS unit standard project work as we arranged you'd do during your time off?

Lrs Some said yes, others NO.

T. Now I give you time off to work on your own you must use that time, otherwise you will have to do it to make it clear and will not be given the time off.
How far are you to completing the project? Remember you must hand in your activity books for me to look at.

Lrs: Generally they were all "almost finished"

T. Please work on it now and be finished by 9:30 Will you manage to finish by then?

Lrs: Yes
As learners work I look at the classroom / walls et
[Learners are working in 3 Groups]
ON the wall there are 3 posters
TOP Riders "Together we Stand, divided we Fall"
RANGERS "The sky is the limit"
Pinnacle "gives us a firm place to stand

Under Each Book There is a list of names

TOP Rangers	Rangers	Pinnacle
MuSA	Naviwi	Phetogo
Miranda	Katlareng	Virginia
Talea	KB	Ratanang
Muku	Phumlani	Lucia
Teboza	Boniwe	Leseko
Tebaho	Keegz	Pontsho
Seleratso	Kurt	Zee
Simpiwe		

Tats: One learner approaches Tracey with a query on a previous assignment due soon. It is a question about budgeting and variance Tracey sits separately with this learner until 8:50 explaining.

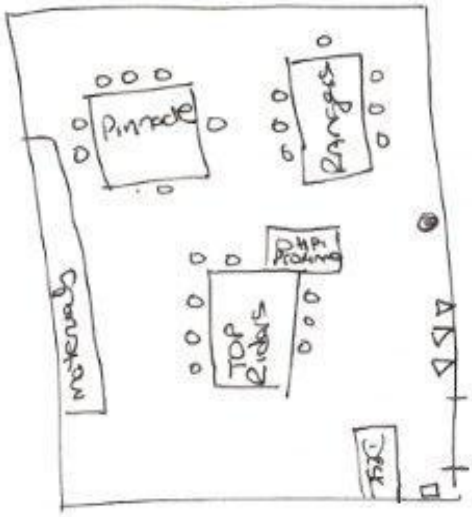
T "Think of variance in Terms of going to the shop to buy something for R60.00 and finding out it costs R70.00 IF you are "short" you cannot afford the item

Tats Students continue to work on the FAIS Stds project in their activity Books. Occasionly one approaches Tracey with a question. She helps him or her. I hear her comment "you are on track" or explaining the implecation of the FAIS legislation in Terms of being allowed to give financial advice.

[While there are gaps between learners approaching Tracey I introduce myself in more detail give her info on the research Link Sheet & Consent

(4)

Tats: Learners continue to work on the FAIS project. While they do this I take note of the classroom & walls again.



[One set of 3 Posters ΔΔΔ is about the Teams and stages of their journey to the Summit, two Base Camp, Camp 2 Carstens, Camp 3 ...

Other Posters are about the FAIS unit std they are completing. They are in bright colours - using star burst shapes - to highlight NB info. relevant to FAIS legislation

There are also posters about Managing ones money (Another unit std dealt with)
Giraffe - Clear Vision Cheetah - Repay Debt
Squirrel - SAVE Hyppo - Grow your Money
Elephant - Know what you earn & spend

□ Ground Rules: Negotiated by learners | Facilitators
(1) Be on Time (2) Respect each other
(3) English only (4) Class Participation
(5) Open action (6) Commitment

APPENDIX G: SELECTED PAGES FROM LEARNER ACTIVITY BOOKLET AND LEARNER MATERIAL FOR UNIT STANDARD 117125 INTERPRET CURRENT AFFAIRS RELATED TO A SELECTED BUSINESS SUB SECTOR

Unit Standard ID	117125
Unit Standard title	Interpret current affairs related to a selected business sub-sector
Level	3
Credits	10

Learner Activity Booklet

Name:	
Organisation:	
Signature:	

IMPORTANT: this booklet must be submitted to your facilitator for assessment as part of your Portfolio of Evidence. Without this booklet, you cannot be judged competent in this unit standard.

Specific Outcomes and Assessment Standards

SPECIFIC OUTCOME 1: INTERPRET INFORMATION ABOUT EVENTS IN THE PHYSICAL ENVIRONMENT THAT COULD IMPACT ON A SELECTED BUSINESS SUB-SECTOR.

Range: Includes but is not restricted to climactic change, floods, earthquakes, drought and other natural disasters.

To prove competence in this outcome, you must be able to do the following:

		ASSESSMENT STRATEGY		
		Assessment Tools		
		Forma-tive Written test	Formative classroom activities	Summa-tive Project
1.1	Current events in the physical environment are interpreted and an indication is given of their possible impact on the selected sub-sector.	1	1.1	1
1.2	Events in the physical environment are compared in terms of severity and the potential impact on two aspects of the economy.		1.3	
1.3	Reports on the same event in the physical environment from the main section and the business section of a daily or weekly newspaper or any other relevant medium of communication are compared and an indication is given of the differences between the reports.		1.2	1

SPECIFIC OUTCOME 2: IDENTIFY EVENTS IN THE SOCIO-POLITICAL ENVIRONMENT THAT COULD IMPACT ON THE SELECTED BUSINESS SUB-SECTOR.

Range: Includes but is not restricted to elections, legislation, terrorism, diseases, pandemics, war, riots, strikes and other socio-political events or disasters.

To prove competence in this outcome, you must be able to do the following:

2.1 Current events in the socio-political environment are interpreted and an indication is given of their possible impact on the selected sub-sector.

2.2 Similar events in the socio political environment are compared in terms of severity and the potential impact is explained for the selected sub-sector.

2.3 Reports on the same event in the socio political environment from the main section and the business section of a daily or weekly newspaper or any other relevant medium of communication are compared and an indication is given of the differences between the reports.

ASSESSMENT STRATEGY		
Assessment Tools		
Forma-tive Written test	**Formative classroom activities**	**Summa-tive Project**
1	2.1	1
	2.1	1
	2.1	1

APPENDIX H: NATURALISTIC OBSERVATION SHEET – TRANSCRIPT 9TH JULY, 2007 9AM

Braams Room
Unit Standard: Interpret currant affairs related to business sector

TR is explaining an activity to do with increase in tax rate and impact on disposable income and ways people manage with less income, for example, cutting back on electricity. More commonly people tend to lapse their insurance policies, which means insurance companies experience losses, maybe reduction in staff, which leads to job losses. i.e., there is a ripple effect, which may lead to insurance policies becoming more expensive: supply and demand in economics.

Also in this exercise she is explaining how an increase in company tax rate impacts on the economy on a large scale. Some companies may go insolvent and again this causes the ripple effect in unemployment, people become desperate; there is usually an increase in crime rates, and organisations battle with increased costs and decrease in investments.

TR refers the students to the article on the effect of inflation and the rule of 72.

Activity 3.1 page 23 of their workbooks
TR reminds them: 'you learned previously that inflation is a widespread increase on prices, insurance premiums, and medical aid premiums. You were asked to work in your groups to present in class what you think the effect of inflation will be on the items in the activity'. TR divides the items between the groups. This activity corresponds with Specific Outcome 3 - Assessment Criteria 3.5 of the unit standard on Current Events.

Activity 3.1.2
TR responds to questions from students. She explains interest, dividends, and that return on investments comes after costs to the company for delivering get taken out.
Investment Shares
Expected return given as dividends
Performance Cash or bonds
Investment pays interest

Inflation will decrease the return on investment

Even cash in the bank is susceptible to the effect of inflation. The bank employs people. If inflation goes up, the cost of living goes up, salaries go up, and they will find a way to pass the cost on to the customer. Because inflation is a widespread increase in prices there are many indirect effects because money has less purchasing power.

TR explains the difference between increase in income tax and increase in inflation.
An increase in income tax = less money at home (a more direct effect)
An increase in inflation = what you do with money is less (a less direct effect, same money at home but a widespread increase in the cost of things).

Income tax has an effect on inflation (not the other way round) in that people are taking less home and…
Factors that drive inflation
Petrol price, because goods need to be transported they become more expensive. So an increase in petrol price contributes to a rise in inflation.

Therefore The Event: increase in income tax has an impact (ripple) to (chain reaction) to increase in inflation. Some impact is not immediate – it is felt at a later stage.

Opposite effect: the Minister of Finance has reduced tax, this means you have more money – even if there are no increases in salary – you are richer and can buy more.

Why does inflation keep on rising? What causes it to rise?
Productivity and wages are a big factor in causing inflation. If you are not productive I have to push the cost of your increase onto the price of the product. When unions ask for 15% and get 12% the government has to find this money, which they get from taxes because they don't produce a product.

Negative inflation (China) happens when they produce more for the same cost or less.

Student:
In your opinion what should SA do to keep inflation say at 1%?

TR:
There are so many factors. The Reserve Bank uses interest rate4s to control inflation. Supply and Demand – if you borrow a lot of money to buy the things you want – and interest rates are high – you borrow less, so supply falls.

Student:
So ultimately we are responsible by not being greedy we control spending and borrowing and interest rates.

TR: Yes, but some things we cannot control, like for example, the price of petrol.

9:45 Tea Break

My discussion with TR on how feedback is handled.

T: I negotiate with groups because feedback happens in two ways: as a group or to the whole class and individually, which takes time with 22 students, and is done at the end of the unit standard, usually while the others are working on their own assignments or activities, for filling gaps and discussing competency. I do the individual feedbacks or group discussions. Sometimes not everyone knows the questions to ask and in a group discussion ideas flow and they help each other to learn. This is formative assessment during the activities. This is what is great about using OBE, the learners are given opportunities to strengthen weaknesses and often they learn from each other as ideas are shared and discussed.

But it is also important that they perceive the importance of trying hard, so I usually set this requirement firmly. We will find a way to ensure the learners get there by explaining in different ways and getting the weaker ones to try again. However a group of 22 learners is large and it takes planning to mark and give feedback both individually and in groups and class.

After Tea Break: Feedback from the group. One member of each group was asked to report.

Rangers:
The effect of inflation on insurance premiums:

- Cancellation of policies
- People become dependent on the state for pensions
- On the short term side – no insurance and would have to pay out to replace items out of own pocket

TR; With inflation if you are trying to save, say for the education of a child, inflation reduces the value and say R100 000 may not be sufficient when the time comes.

On Medial cost:

- Pressure on government if people have to use government hospitals, if they can't afford medical aid because schemes pass costs onto members – more expensive or less benefits e.g. Discovery battling to stay solvent.

Pinnacle:
Investment and salaries:

- Increase in inflation = decrease in returns on investments
- Cost will be passed on by companies
- Increase in inflation = people having less money to save and spending more to live
- Earnings (salaries) are buying less and will impact on expectations of salary increases.

TR: Anyone has any comments?

Top Riders:
Pensions,

- If pensions are not increasing with inflation an average person will need an extra annuity to get the same income they originally planned for

Goods and Services

- Governor of the Reserve Bank Tito Mboeni increases interest rates to control inflation so people will spend less – less demand for goods and services.

(Comment: Learner struggles a little to be clearly articulate, but TR clarifies along the way).
Value of the Rand:

- Real value is purchasing power, and increase in inflation means we can afford to buy less.

TR: We have done inflation in a previous unit standard so this activity has crossed over nicely.

Activity 3.1.2 Page 26-28 ID what is the Event
Article 1 Page 29 – Rangers
Article 2 Page 30 – Top Riders
Article 3 Page 31 – Pinnacle

Study the articles

TR explains to the learners the articles have a lot of jargon and technical economics vocabulary. She urges them to focus on identifying the major EVENT and relating its impact to the insurance industry. While groups work TR circulates among the groups responding to queries.

During the morning students drop off the assignments for Vanessa the other facilitator. They have been working on final adjustment for this assignment based on the unit standard on researching the History of Insurance.

(I ask TR about the readability level of the articles). She explains that the articles are meant to expose the learners to the language of their field though we some concepts and terminology are above their level of understanding at this stage. We guide them to focus on the activity and identify the event and impact on insurance industry, which is guided by discussions and explanations of language ad concepts).

Feedback from groups:
Top Riders
Impact of Global Hangover:

- Rise in premiums

TR probes by asking which sectors?

- Long Term sector is affected negatively

TR probes again, what is the connection?

- Loss of dividend returns – less profit because of payouts – Severity is high
- In the Short Term sector the effect is less, severity is low.
- In Reinsurance – there is less impact, severity is medium
- Healthcare – no impact
- Pensions sector Like Long Term and increase in premiums compromises returns, which are reduced.

TR thanks the group for the feedback and everyone claps.

Rangers
Bonds effect on insurance

- Interest rate cut = people can invest more with bond rated cut people can buy houses. The rate cut has the effect of putting more money in peoples pockets, they feel richer, can save more, provide for retirement more.

Pinnacle
Connection of Oil prices on inflation

- Decrease in oil prices = decrease in inflation |(transport cost)
- Lt insurance – people can afford premiums

- St insurance – people can afford to insure, job creating
- Healthcare - people can afford more h/c insurance
- Pension – people can afford to provide for their retirement more adequately.

Next TR explained she would be giving feedback on 2 unit standards next. 12 learners today and 10 tomorrow. Then in 3 weeks time when she comes back she would give individual feedback on 2 more unit standards. She explained that the feedback order would be random, no meaning to the order in which she would give individual feedback.

Next TR asked learners if they had chosen a story for their assignment.

A learner said she was confused about the assignment

TR asked her why

L: Because I don't have access to the Internet and I don't have newspapers.

T: Why don't you have newspapers?

L: Because we throw them away and you only told us 3 days ago.

T: Then you already have 3 newspapers?

L: Some of us only buy the Sowetan not other papers.

T: The point of the unit standard is for you to read. If you listen to the radio, talk to people and read a newspaper everyday you should not be battling to find a story.

L: But I am not sure which story to choose because I don't know when it will be finished if it finishes quickly it won't be suitable.

T: remember that this unit standard is for 10 credits that is 100 hours. Buy reading and talking to people and listening to the radio you will pick up on what is going that could impact the insurance industry- even of a story is not long – others will come up. It does not have to be one story, though it should be one that has an impact for you to report on. You need to start reading to find good stories.

Another learner has a query on assignment 2 – The Credit Act – story

TR responds
She explains to the learner that his notes are 'working papers' that they are his tools when reading the article – towards answering the questions for the activity. After reading the article he has to think about the big picture, but TR says: 'don't give me a big file with cuttings of articles, the important thing is what you interpret from them.

TR explains a New Activity they will do while she is outside giving individual feedback – Going back to the beginning to clarify what is required:

I am asking you to read 2 articles

1 Article from the general section of the newspaper
1 Article from the Business Section

All of you just read - interpret the event and identify who is affected.
On page 24 – Compare the two articles

You don't need to do all 5 articles, choose and do only 2.

She asks: Do you want me to go through this again?
Learners respond: Yes

From the two articles you chose and read only, complete learner activity from page 32 to 34
Answer: Who is affected?
Compare the 2 articles.

Put down individual answers and work in your groups.

She asks one final time: 'Do you want me to clarify, speak now because I will be outside giving individual feedback while you work on this. You should be very familiar with this activity it is the same as others we have already done.

APPENDIX I: SAMPLE OF INTERVIEW TRANSCRIPTS: MENTOR INTERVIEW WITH TH.

27 February 2008

T
This is an interview with Th on the 27th, and thanks for agreeing that I can record and for bringing back the consent form.

We had a brief little chat about the work place experience with the learner in your area when I came to meet all the mentors. So what I did I put together a few questions that can frame a conversation around the things I wanted to find out about. If we come to the end of it and I haven't asked something that you have been meaning to tell me, please just butt in and tell me. Otherwise I think that it is just nice because we can just chat and information will just flow nicely.

I thought it would be lovely to start off just by you letting me know what do you know about this learnership and have you been involved before.

Th
Te is the first person that I have worked with that comes from the learnership.

There were other people that I have interacted with in the past that came from the learnership and people from the learnership are generally motivated, hard working individuals who when they come from that learnership need a lot of coaching, a lot of assistance, mentoring etc.

T
The other people that you came in contact with, they were also youngsters.

Th
They were.

T
The first time in the work place.

Th
They were yes.

T
So how did you become to be chosen to be a mentor?

Th
Well in this particular instance it was automatic with Te coming in to my team.

T
Did somebody come ask you if he could be in your area?

Th
No.

T
How did that all happen that he came to be with you and you to be his mentor.

Th
We are currently snowed under with work. We have a lot of volumes coming in, new funds and memberships, so there is a need for assistance in the team. Guys are prepared to take loads of work on. So we had him, he was available. We were advised as were the learnership that were available, there were three.

T
Who advised you Th?

Th
My manager told me. Neresh told me. There were three guys and we needed to choose. We didn't know who they were so we just said that we want this guy.

T
Eni, meni, mini, mo (laughter).

Th
Yes.

T
That's a good way.

Th
Ja.

T
If you don't know somebody, everybody gets an equal chance of being chosen.

Th
Ja.

T
All right, so I suppose Ivy or somebody from human resources must have spoken to your boss and said that we have got these people available.

Th
That's right yes.

T
And so what are your beliefs about mentoring now that you have had this very direct experience with being that coach, that mentor for the learner in your area.

Th
It's ideal. Its ongoing, it applies to …

T
How did you become a mentor, what is your kind of thinking behind what a good mentor is.

Th
I think it is somebody who is prepared to … you coach; you need to coach the individual. A good mentor is somebody who does it automatic, it is not something you thing about. It's not teaching either. I am not going to be teaching the guy, this is what you are going to do. I am going to be supportive, aiding him along and my idea of a good mentor interacts with being a good coach. It's something that you don't have to, it's seen in you, it's not something that you have to be told, not something that you have to ask and it's something that is natural. If it is natural then for me it is a good mentor.

T
And that's how you feel it comes from you in your relationship with Te.

Th
Ja.

T
How has this relationship grown over the past four months? Is it work, is it better than that. What kinds of things have you interacted around?

Th
On a work level just mostly work. This particular instance with Te has gone from strength to strength and how that was seen from the monitoring perspective with the number of claims that he has been given to handle initially. He now handles a slight bit more. If I can put it in perspective, we are given twenty claims to handle for the month, now he handles close on eighty claims and in addition to that he looks at the part of the book of business that is the recons, all of which he hasn't had training for. So if you look at it in a business sense, Te is doing extremely well taking into account that he hasn't had any formal training and with the amount of workload that he is currently sitting with.

T
So he has picked up from listening to you, looking at what other people in the department are doing.

Th
He has yes.

T
Asking questions.

Th
All the time.

An in comparison he has shown other staff members who had formal training, he is head and shoulders above others in terms of performance.

T
Have you told him that he is good at what he does?

Th
I do all the time. I feel that it is important. It's only fair that that gets communicated to him. If he is good, he is entitled to be told that he is good.

T
And the people that run the learnership, the HR manager, your manager, do they get that feedback as well from you.

Th
They have. I have given the feedback to our HR as well as to Pieter who oversees operations at Funds at Work.

They have been advised of that as well.

T
I think that's good; I think it will encourage them to be part of the process for future learnerships as well. If they see it as value added coming back.

Th
Yes. That being said and done I do have a problem, a serious problem. I've had with Te showing, performing the way he has, I would have wanted to have him permanent already, but there is reasons why he hasn't been because there is procedures that we have to follow and there is this test that he needed to do which he had already done twice. He has to do it now for the third time.

The first time he done it he failed, he didn't do well he didn't meet our standard. It was a low grade 8 our standard is grade 8 which is the lowest currently, which is the lowest for Momentum.

T
Are you talking about the ELSA Scanner, where it measures the English functional ability?

Th
Ja. He redid the test.

T
Did he do the training that is available, because I believe from Ivy, you do the assessment and if you are not quite up to scratch you can go on a programme.

Th
Yes.

T
Has he done that programme?

Th
He has done the programme, but that is where the problems come in. It's with the programme that he was on. Our HR felt that he went on the programme but he didn't do enough hours. He was required to do twenty hours, but he has only done one hour.

However, when he was retested which was within the six months, which also you cannot be retested according to the laws of ELSA Scanner, you cannot be retested within six months because you can remember some of the stuff, he was tested within three months but, the bottom line is he done better. He was on a grade ten eleven.

T
Wow, okay.

Th
I was very happy when I got that result.

T
He was on an eight before.

Th
A low eight before. I was very happy when I got that result.

T
With one hour of remedial, but three months of work experience.

Th
Yes.

T
Interesting, hey.

Th
Yes. So HR felt that it wasn't it doesn't justify the, it is not accurate and there is something else that could have resulted in him doing much better with the second test, I don't know and there was some wrong doing somewhere, the way it was explained to me. I didn't quite understand it. It doesn't make sense to me either. I can't accept the fact that Te would be involved in some wrong doing around the process in order to get his grade up.

The only other thing that make sense …

T
Is that a firm suspicion or is that like with proof that he did something wrong.

Th
In my opinion, it is a suspicion, because the way they justify it is because one hour would equal on grade 8, two hours would equal grade 8 and a bit, three hours would equal a grad 8 and a bit more, and so on. Twenty hours would equal maybe a grade 9 if worked more than twenty hours maybe then a grade 10, but no ways would one hour equal from below grade 8 to a grade ten eleven. It is not possible.

T
They say that.

Th
That is what they are saying, but …

T
What about nervousness and you know sometimes you just don't do well …

Th
Yes, all of that was explained to them, but taking all that into account was the fact that he did go home and he read a lot, take business papers and he did take books that would increase your vocabulary, it is possible to have done much better the second time around, having read a lot for that period of time as opposed to going on the course. So I don't know the cause is the measure by which the twenty-hour would justify a grade ten eleven result according to our HR and not going home and reading because he cannot be monitored. I don't know.

T
Oh okay. So at what state of affairs is this whole debate at the moment.

Th
It seems that Te finishes on Friday.

T
And you can't employ him, is that what you are saying.

Th
I would take him on a contract basis until we get this all sorted out.

T
Okay, is that a possibility?

Th
No because now he needs to complete twenty hours for this week and get tested on Friday again because we give him a contract, but to me that is unfair because that is what we offer all our other temps. We say you are temping now. Bear in mind he hasn't been temping, he has been on the learnership.

If I am going to give him a contract now, he will be temping.

T
Do you temps have to do the ELSA test?

Th
No they don't. They only do the Olsen test when we see what we really have is someone like Te. Please do the test for us, lets see what you results are, if your results are not what we expect, they we say can we test you in six months time again. After the third month we renew your contract for another three months and by the end of

that you will be ready, that will be the six-month period, we can then retest you in six months time, but I am very frustrated.

T
Have you spoken to Jeanette to try and help you?

Th
I have, I have. She has tried to help me, but Linda who is in chare of our HR is quite adamant, she has put her foot down. So that's her decision. That's, that. So I'm very irritated and annoyed. It is really unnecessary, I don't see why we couldn't have given him the contract because then it gives him enough time to do the other twenty hours, whatever is required.

T
Any recourse that you can take, so that you …

Th
There was another test that Jeanette tried to help with as an alternative. Let him do this test then, it is equivalent to an Olsen Scanner, she said no.

T
And if your manager puts in a kind of testimonial of his work performance. I mean if you go from forty claims to eighty claims and he is performing better than some of your existing staff that had formal training, would that have some impact.

Th
I doubt it. I'm not certain that it would.

T
Maybe it is worth a try, who knows.

Th
No.

T
Don't give up on him, if you can see that he was doing so well.

Th
Ja, but it is frustrating we really need him.

T
I understand.

Th
And we have been complimenting each other instance. I need him and he needs to be work. I don't know it is just one of those things. (Laughter).

T
Okay, let's have a look at the four or five months that he has been with you. Before that in terms of preparing you for this role of mentoring, have you every been on any

kind of information session or a programme, you know that is offered for mentors that is going to be taken care of learners that come with learnerships to work place experience.

Th
I have been on a coaching course but not something for learnership.

T
Not related to the learnership.

Th
No.

T
Was it a Momentum coaching course?

Th
Yes.

T
Okay, but obviously that gave some insights to the learner process, it prepared you a bit.

Th
Yes, and I want you to think about the four or five months that you have had him in your area and tell me just a couple of pictures, some really highlights of things that impressed you or where you felt that he learnt and he grew a lot out of an experience and, but in terms of his learning process and maybe something that was a challenge that the two of you sort of worked on together. Something like that.

Can you think of anything?

Th
No, except for the examples that I have previously given that was really impressive was the fact that his ability to taken on more, and pick up yes. To do more than the average on the floor in comparison to a person who has had ten years experience. As far as claims were concerned, you couldn't compare Te and another service consultant in the same area. That to me was really impressive, and from the very beginning he showed potential.

T
That is wonderful. Any kind of challenges that you saw him through in terms of adjusting to the work place, that sort of thing.

Th
Yes. The one was giving him the responsibility of looking after our employee portal clients. That is a complete fund with members and it is a whole process from start to finish, so it's much more involved than just doing a claim.

That was challenging in terms of would he know what to do, would he know what was expected of him and what was required. He caught on very well; he was able to see that through. It was touch and go initially, I must be honest. We tried another route prior to that but I changed my mind afterwards. We were going to only give him risk only funds, which was a bit of an involved process. I thought rather do that, give him a portal fund that doesn't require getting involved as much.

T
So it was a kind of a building step to the other fund.

Th
That's right yes. He is not a fully-fledged service consultant yet.

T
What is the role of a service consultant in your area? You know a fully-fledged one.

Th
A fully-fledged one is one who processes reconciliation's, the collection thereof from start to finish. That is getting information from the client, feeding it through the system, uploading it and making sure it is finalised and invested before the seventh of every month.

In addition to that they do claims well and revisions. They also deal with queries.

T
And how far is he on that.

Th
He is about half way.

T
Besides the claim side and the sort of the reconciliation.

Th
The actual getting involved with the reconciliation side he hasn't touched at all. He hasn't got involved with that yet.

T
That would be the next step.

Th
That would be the next step yes and for him to go advanced to that step that would require training.

T
Sort of formal training that you run at Momentum.

Th
Yes.

T
He did months of Theory before he came to the work place. So level three learnership, which means, level four is matric qualification, but this is level three because it is so intense in the industry, the things that they get. It is for people that is first coming in to the industry so they get a lot of information about everything, what's this, this, this.
But obviously not in depth information. Over and above that they learn a whole lot of things over the four months. Have you a sense of how the Theory was useful to him in helping him cope in the work place.

Th
Not at all. Like I have no idea of what the Theory that you refer to. The industry that it covers I don't know what that ...

T
What's a pension fund, what is a collective investment, what is a unit trust, what's financial services, what's FAIS, what's FICA, you know it is like this is the kind of world that you are about to enter. This is what a claim is; this is what an investment is.

Th
It is purely an employee benefits industry.

T
Well it's in the long-term industry, so it would focus on all the things that were not with the short term. You know your half end of the financial services.

Th
Does that cover investments as well?

T
Yes. But it is just an understanding of what it all involves at what it is. No like the nitty-gritty.

Th
Yes, yes.

T
He also did a whole lot of life skills. How to behave in the workplace, how to handle a conflicting situation, how to voice a feeling or an opinion in the right way that it is constructive. How to manage your time, you know all those kind of softer skills that kids coming from a background of no work experience would kind of hopefully use in order to fit in to the environment. That is the five months of Theory.

Th
Oh that's brilliant okay. Did they get assessed on any others?

T
Yes.

Th
What was that?

T
It was formal training. It was in this room they were put in groups and the facilitators would run a session and they would have assignment to do, research. They would have tests that they did at the end. They would be assessed in their group projects.

Th
That's brilliant. Now knowing what these learners go through. That's excellent, because we always get guys in and try to fit them in. Its people who have experience in the industry, that's first prize. Second prize is someone who is closest to that.

T
Hopefully the learnership is going to be able to do that at giving a person from a previously disadvantaged background, somebody who would struggle maybe to get entry, that learnership just prepares them and it make them more valuable.

Th
That's brilliant, then the soft skills that you are talking about also helps with the attitude because you don't know the person that has had years and years experience in the industry and you get him and you are thinking wow this is great, then the person doesn't have a really good attitude and you struggle with that, because the person didn't go through that whole training bit.

T
You kind of picked it up just by bumping your head and having situations that you handled during your ten years of work experience.

Th
That's right.

T
And it takes a while to get there.

Th
With Te I must be honest with you, what a pleasure it was working with him, interacting with him because a guy with a very good attitude. With regard to the fact that he didn't know what to do here and he didn't know what to do there, if he was below par performance and the attitude was up there it is always better to get that person to work him up to that level where you can be productive if the attitude is right.

T
I think you saw that in him.

Th

Yes, that is what we achieved with Te. In the past with one or two of the other learners I wasn't aware of the fact that they did go through this soft skills but that didn't show.

T
Well you see that is the thing, it also I think it depends on the type of person that you get who is going to get, I don't know maybe maturity, maybe something that makes them fit better or use the training, you know that's the magic ingredient. How they take up that learning and make use of it.

So told me if I followed him in the workplace what I would see. That is great I have a very nice picture of that, I think I have a very good sense of what you would do differently next time, but maybe you want to just fill in a few things. If you could move the clock back and you were at the beginning of his work place experience would you change anything?

Th
Okay. Of course I would. That twenty hours story I would have got right from the word go.

T
Yes, I would.

Th
I am feeling very annoyed, very irritated. I am sure you can sense it.

T
Yes, I can.

Th
It is totally unnecessary, it is totally unnecessary.

If I could, ….. that is the only thing that is holding us back that twenty hours story. It wasn't slipped up from the beginning. It's not his fault because he didn't know. Had he known and it was explained to him that whether he would have done something about it. If I had known as well then I would have made sure that he was following through with that. For me to turn back the clock that's what I would have done that time already.

T
It would have made such a difference.

I think that leads nicely because my next question is about suggestions for the future in terms of the work place experience part of the learnership and the mentoring that is given to the learners, I think from what you just said the starting point would be better information up front.

Th
Yes, yes.

T

If you can think of two three very important things that would really change the process and make it more than official, add more value.

Th
I can think of one other thing that would be beneficial is an interview similar to this up front. This is the learner, this what he is going through. The first time that I, I know about the learnership guys, but I didn't know what sort of training, what sort of learning and what sort of things they are on. It is very nice to know that they do such skills. For me that is vital. As I have mentioned that the fact that guys with attitudes coming in is difficult to work with as opposed to someone like Te who has a good attitude. It is easier to get along with, and maybe this is what is going to be happening. You have this guy here this, that and the other, but I don't know if you know that this is the learner he is going to go to that team and I don't know if it is going to be beneficial because maybe he will survive that team for two weeks only. I don't know how it works. For me the sort of situation that I am currently in, sort of set up that would have been informative and assisted.

T
It helps you plan, doesn't it?

Th
Yes it does.

T
What do you have to work with and what can you do along the way to make it benefit you and the person.

Th
When he started in October I know that I had him until February. I knew that. But I didn't know that we would have an interview and …

T
That's all you knew that you would have him for the.

Th
That's right yes.

T
Okay. Now some people say it's nice to be in one area because you can learn in depth about one thing. Some people say that it would be nice if I could have learnt, but I think that depends on what area you are in. So if someone had to do something very basic in the admin area, learning very simple little things I think it comes to a point where they really need to vary on something else more challenging.

We are trying to see what would be best for you in terms of adding value to what you need to produce, and for the learners to be in a position to be marketable. Its kind of that balance. I don't know if you have any views in terms of is it better to have a little bit of insight before they come to you, or if it is nice for you to have someone straight off the Theory that you can really work with in terms of the requirements they need to learn in your department. Can you see the debate?

Th
Well I suppose if you look at the type of persons that we are taking on currently, like I said previously if the person has had the experience it would be first prize, but in this particular instance, now knowing what they are coming from, this for me is then the next best thing.

T
Okay then you want him in your area so that you can use the four months to really prepare him to be productive. That's what I am hearing, is that right.

Th
That's right.

T
The last think I wanted to ask you about is the employment opportunities, but I think we know exactly what is happening with that as well, and I really hope that it comes right and there is something that you can still do. That would be such a wonderful benefit for you and Te.

Th
Ja.

T
So, I'm hoping. Any final comments.

Th
For him now as closing at the end of Feb, is that it.

T
The learnership finishes at the end of Feb so he has got a contract with Momentum in terms of being on the learnership where he gets his allowance and opportunity to learn. That will finish on Friday. That is my understanding.

Th
Ja. I thought they could extend it for just another week or two at least, maybe in that week or two we could sort things out.

T
That's something that maybe can be done if you ask Jeanette. I don't know about the rules of contracts and paperwork because that is between the company and INSETA, but Jeanette will be able to tell you.

Th
I'll do that. I will go back to Jeanette and find out from her if it is possible, for the next two weeks so we can get that twenty hours from him. It's impossible to get the twenty hours in a week's time. It's not going to happen even if he did put in two hours every day for this week that would only be ten hours. It's not going to get him to where we want him.

T
I think you can only do so much in a day if you are doing a programme.

Th
That's right, yes. Two hours is sort of such a lot of information you just switch off.

T
Yah, your brain can't cope with the overload.

I wish you all luck, I really do. (Laughter).

Th
Thank you.

T
And I really appreciate the time that you spent; I know that you are really busy Th.

Th
I am, yes.

T
I tried to be as quick as I could, and still I got very valuable feedback, thank you. Thank you for all the open insight.

Th
It's a pleasure.

T
If Te is there, would you ask him to please come in?

Th
I have spoken to him, I said about ten.

T
Could you please sign this?

Th
Can I put today's date? Twenty-seventh.

T
Yes, twenty-seventh of February already. Can you believe it? This year is going too fast, I think the older we get the quicker the time flies.

Th
Yes. Thank you.

T
Thanks. Can I shake your hand and wish you well. Thank you so much, take care, bye.

APPENDIX J: SAMPLE OF INTERVIEW TRANSCRIPTS: INTERVIEW WITH TE (MENTOR TO TH) - 27 February 2008

T
This is an interview with Te and he has agreed that we can record the conversation.

Te
Yes.

T
So that it can be a conversation.

I have just had a nice long chat with Th your mentor and also to catch up because I looked at what was happening when you did the Theory part of the learnership, now it is time to go back and look what it has been like for the work place experience.

What I did is I put together just a few questions that would help frame all the information that it is nice to have.

Te
Okay.

T
But we can talk more, add things and at the end if you think I haven't asked something that is really important that you want to tell me then lets just do that.

So I thought it would be nice to find out from you how did you come to be placed in the area with Th for the work place experience. So think back when you finished the Theory how did you get placed in this area with Th to do the work place experience.

Te
I think Ivy was doing the placement because we were only told that where we were going to Funds at Work, we did not apply or do anything.

T
Okay, some people had to apply or do interviews.

Te
Yes.

T
And all sorts of things but not for Funds at Work.

Te
Yes, not for Funds at Work.

T
And that's the area that you were in.

Te

Yes.

T
Alright, and think back, what happened to you that first day in the work place, where were you told to go, who met you, what happened to you for that whole day.

Te
They told us that the operations manager from Funds at Work is going to come and fetch us.

T
From where.

Te
From … Sechaba. We were standing next to Sechaba and he came to fetch us and they took us to the right departments, because there were three of us and the other two were placed in different teams.

T
Okay so who were the three of us?

Te
Pon and Ktl.

T
They were all with Funds at work but different teams.

Te
Yes, and we were a bit excited cause …

T
Who came to fetch you?

Te
Ner, the ops manager.

T
Okay, Th's manager.

Te
Yes.

T
And what happened then.

Te
And he took us to the right teams. Fortunate enough I was taken to his team and the other two were sent to other managers. Like a said we were a bit excited, but a little bit shaky because we did not know what to expect from it, but it has been a nice experience.

He welcomed us very well.

T
So then Th welcomed you.

Te
Yes.

T
What else did he do?

Te
Th had a meeting and he come and told me I must be part of that meeting and introduced me to the rest of the team.

T
What was the meeting about?

Te
Staff feedback. Things that were I think it was the beginning of the month so they were talking about. It was the feedback for things that they did for the last month.

T
Okay, and that happened on your first day.

Te
Yes. Not my first day if I am not mistaken, I think maybe the third day. Because the first day they only took me to the person who is going to show me what they need me to do.

T
Okay, so you had not Th but one of the staff …

Te
Yes.

T
The other person for the day, what kind of things did they show you?

Te
Yes.

T
Who was it?

Te
Michelle Comka. She showed me a lot of things and when she left to maternity leave I feel that I was definite that I was going to replace her.

T

So you did her work when she went on maternity leave.

Te
Yes.

T
Is that what you did for the four months that you worked?

Te
Yes.

T
Okay, so that first day what was the first thing she showed you how to do? Do you remember?

Te
Mmm. That first day I was just sitting because she was still busy. We did not do much. The first day she showed me the withdrawal forms, what I must check on the forms. After checking the forms, how I must compare the form with the information we have from the system and things I must do after that if I am satisfied with the information that we had.

T
So she also had to show you how to work the system.

Te
Yes, because most of the things that we do are based on the system.

T
What is your system called?

Te
Obet. We have a lot of systems.

T
Oh you do.

Te
Obet and there is another one which is called ACC which is our work flow and another one which we use which we are able to get a directive from SARS. That's our system.

T
Okay. So what is the work in that department Funds at Work. The work that you were learning from Mich. Is it to do with what?

Te
Retirements and provident and pension funds.

T

Okay, and what is it that you do?

Te
We pay claims and we do recons. We get contributions from the employers then we update them on our system every month.

T
Okay and so what I want you to next, we have looked at that first day, that first week, I want you to have a look at the four or five months as a whole from the end of September, October, November, December, January and think of the positive things, the good things, the exciting things that happened. I just want one or two pictures, maybe you can think of an example or a situation and then also I want to know about challenges, about something that stretched you, that made you grow. Something that maybe was a little bit hard but you managed or that kind of thing.

The sort of things, remember I gave you a learning journal.

Te
Yes.

T
What happened to the journal?

Te
Unfortunately I left it.

T
Where did you leave it?

Te
At home, because I am doing a lot of work and I am still going for another training, which is due on Friday, and I then forgot that I was meeting you today.

T
Oh, okay. A stressful time.

Te
Yes.

T
Did you manage to write a few things?

Te
Yes, a lot, a lot.

T
I must ask Ivy to ask you guys to bring the journal back because we are talking about it any way, but I just want that to have for later on when I put my portfolio together, because like you I must also put a portfolio together, so that I can have that as evidence.

Te
Okay.

T
Don't fuss too much because we are talking about the things that would have been in the journal.

Te
Yes.

T
So paint me these little pictures, you know something fun, something good, something positive, the challenge, the difficulty you had to overcome. Can you thing of a couple of stories, pictures.

Te
When the whole thing started, it started as a challenge because I did not know much. In fact I did not know anything. So my challenge was to make sure I grabbed everything I was told by Michelle and have a look, know the system, know how to deal with brokers, how to handle the telephone queries, so I had to make sure because they only told me that Michelle was left with one month and two weeks.

So I had to make sure that during that time I catch up very fast and fortunate enough Michelle was very patient and she made the whole thing very simple for me.

And after then the excitement was that after she left, I could now know what I must do and the result was there for everyone to see and I was…

T
You were coping.

Te
I was not exactly coping because it was a lot of work because …

T
What did you do about that?

Te
I tried to work very much.

T
Did you have any discussion with someone about it?

Te
Mmmm. Ja, Th came to me and he told me that I must not stress a lot. If I need anything I can still come to him and he will be able to assist.

T
How did that make you feel?

Te
Very relaxed, cause I know I must not put myself under pressure and I am still new and if I need anything I know who to go to and the rest of the team they were very supportive.

T
How big is your team?

Te
A team of six people.

T
Okay, not to big so you get to know them.

Te
Yes, yes, yes

T
And then you came and you had Christmas time. Think of that time, what did you do?

Te
We went to a restaurant in a mall. It was with Neresh because Neresh's team is divided in to two teams, team five and team six with the operation manager, its Th and the other operation manager from team six, Asiva, so the rest of the team were together team five and team six and we went to Christmas party.

T
Mmmmm.

Te
And we enjoyed. That's when I started feeling very relaxed because I started knowing the rest of the team.

T
Okay and ...

Te
And since then it has been hard work, hard work because it has been very busy.

T
And tell me about a challenging thing. A little bit of a tough time, some situation that you had a problem that you might have had to solve. Maybe your training helped you, can you think of anything like that.

Te
Mmm. I think handling the queries is the most difficult part because you can only find that we don't have enough information on the withdrawal form and we have been

trying to get hold of that particular person so that we can get that information. After maybe a month that person comes to us again and say where is my money I have been waiting for my money, and if when you tell that person that you have been waiting for you trying to get hold of you, then it's a big issue to him. So I think dealing with clients must be …

T
Now where do you think you learnt to manage that and how do you manage that.

Te
I think inside the class, the learnership because I think there was a unit standard to which we were dealing with. Our client service and telephone, so when we were doing it we were doing something like a grammar inside the class, so we were playing that time, we did not take that thing seriously. But after a while when I started doing the actual job, that is when I realised that the thing that we were learning were very serious and things that are happening.

T
So you used that experience.

Te
Yes, it helped me a lot.

T
And what do you do then when the clients really cross. (Laughter).

Te
You must be always calm and you must not react back. Because if you explain to them what has been happening, and every time when you are dealing with the case it is better to put on notes and so when that person calls you can read on the notes to say on this day I did this, and did this and did not get hold of you. So it makes you life a little bit simple if you have something written down which you can refer to when you need that information because you are dealing with too many claims. Sometimes you can even forget about that claim, so if you don't have notes it is going to be very difficult to explain yourself to that particular client.

T
Who told you about notes?

Te
Michelle.

T
And tell me can you think back on all the things that you did in the Theory, okay, there was a lot of learning. How did those things, how were they useful to you when you went to the work place and what things were useful to you.

Te
They were very useful because at first I did not know anything much about the provident and the pension fund and the legislations and when I started working with

pension funds and the provident it was simple to me because there were things that I have learnt already in the class. I knew what they were because I did not go for training inside Fund at Work that's why Th was amazed I managed to catch up that fast without knowing how this thing operates.

T
Okay. That's wonderful. Also you said that the other side of the training, the customer service was useful. What else that was good for you to have had.

Te
I think learning about the insurance company as a whole. How it started and how the insurance company operate. I came here in the learnership, I only knew about short term insurance, car insurance and household. I did not know much about life insurance and stuff. So I think if I was not in a learnership I was going to struggle a lot to know the system and know the legislation and all the stuff behind insurance.

T
And tell me, obviously when you were on the learnership people were talking about when you go to the work place and you will have a Mentor who was going to do mentoring for you, you must have had an idea in your head what the mentoring was going to be. How do you feel about the kind of mentoring that you received in the work place with Th?

Te
I think Th was very supportive and I was fortunate to be in the team that I was in because the rest of the team was very supportive. There were people, which you know you can count on if you need something. All of them were willing to assist or help when you need something, so the environment for me was overwhelming because I know if I had a problem I could just ask anyone and he managed to assist me with anything.

T
Okay that's excellent. Your relationship with Th. Tell me a little bit about that. What sort of things do you talk about? How much time do you spend with him?

Te
Th the relationship, it is very open but mostly about work. Lets say for instance cause most of the queries go to him and most of the times he comes to me because I am only one person who is doing claims now, the other team is doing recons the contribution from the employers. We talk about queries, claims and how to make most of the queries simple, how must I must communicate with the brokers and if I need some assistance, if I am e-mailing a broker or someone I must cc him on that e-mail so that if I did not put something on that e-mail that he thinks I must add it can also be able to be part of that e-mail.

T
Okay. That is wonderful, so he has been right there beside you. And tell me if you could make any suggestions to improve the work experience part of it and also the learnership as a whole, if you can think of maybe just two or three really important

things that could make this better in the future, what are the things that you would suggest.

Te
I think most of the managers don't know a lot about this learnership. Most of the guys from the learnership they went to the mailroom, others were sorting, I think those were the experience that they really didn't need. This learnership is all about maybe for instance you must get an experience in financial or administrating or something so that after the learnership you can have some kind of experience. So I think it would be better next time if during the learnership they must not wait until the last time to place people in the learnership they must go to the managers in time and explain that we are going to have learners from the learnership, if you want them for your department or for your team, you can come to us and you can be able to assist you. If you need someone who will be doing administrating, someone who will be able to assist them in learning most of things that you do. Not going to print letters and do stuff you are not going to gain anything from.

T
That is very useful, thank you. Anything else.

Te
Except that I after then I think it is up to you if you really want to get employed from the work place or the team that you are working on because you must work very hard.

T
It's what you give back.

Te
Yes.

T
Now let's talk about employment.

Te
Yes.

T
What's been happening with you in terms of employment? Have you been for interviews?

Te
A lot has been happening. It's like most of people are resigning at Funds at Work. So the HR is trying to fix the problem, they are trying to make sure that people are getting employed now, the right person. So first time when I wrote the assessment you have to write, that is which is an entry level for Funds at Work. So the first time when I wrote it, I think I did not prepare myself that much because I only came in and Ivy told me that you have to go and write now, and I was not prepared.

I only went there. I thought if I fail that test I am still going to get employed because I am working very hard at Funds at Work, so I was a bit relaxed only to find that later

after writing that test that assessment was very important and actually is my entry level to Funds at Work and I am supposed to pass it if I am going to secure employment.

T
What test is that?

Te
It is an Olson Scanner, and I failed that Olson Scanner. After a month Th came back to me and he told me he wants to take me permanent and how was my result for the Olson Scanner, that's when I started realising how important that test was and I went back to Ivy and tell her that Th wanted to employ me but I failed that Olson Scanner.

I did an ELSA Scanner training on December.

T
How much time did you …

Te
I think I came for two weeks, doing it an hour each day. And after a month Ivy print out those results and that Olson training told me that I only did four hours so we did not know how exactly it works.

T
Did you give Ivy feedback that you did more hours?

Te
Yes, she said that she would get back to me, but she managed to organise another Olson Scanner which I can write, and I went back and wrote that Olson Scanner and passed, but Ivy did not inform the HR from Funds at Work that we were writing that Olson Scanner.

T
The Olson Scanner you said you did in December, and how often did you say you did it.

Te
I think for two weeks because the following week it had some problems. We had to contact the Olson administrator to fix that, because we had problems when we tried to log on.

T
Okay. Two weeks and how many hours each day. Its ten days that you did.

Te
Yes.

T
How many hours a day.

Te
I think an hour and a half.

T
Okay. But the result said four hours.

Te
Yes. So Ivy managed to organise to rewrite another Olson Scanner, so I went and wrote another Olson Scanner which I passed and at Funds at Work they want to get grade 8 in order for you to get a chance to go to interviews and I got grade 10 to grade 11.

T
Fantastic.

Te
Which they were amazed because they told me that it does not normally happen and if someone put on four hours on that training and come back and get grade 10 to grade 11.

T
So what do you think happened?

Te
'Cause I think like I said. First time I was not ready for that Olson Scanner. Another thing we were doing a lot of work inside the class, reading, assignments and stuff and I think after the time which I was in the work place, I came a bit relaxed and started not reading a lot and I think my vocabulary maybe started going down or something.

So after that time I started reading December reading magazines, newspapers because Ivy told me that if I can start reading I can increase my vocabulary and maybe I will improve my English.

T
Yes.

Te
So I think after reading a lot and doing the training as well it helped me to increase my English. So when writing that ELSA Scanner for the second time it was very simple. Still the HR don't think I deserved to get those results, so they still want me to go again and rewrite the same test.

T
And when are you doing that.

Te
I think I'm doing that training again. I must get twenty hours on Friday, so that I can rewrite again.

T
Okay, so at least they are going to let you give it another chance.

Te
Yes.

T
That's good, and if that goes okay then you said that Th is keen to take you on board.

Te
Yes, yes.

T
I am going to wish you lots of luck. That is wonderful.

Te
I am counting on that.

T
I think you have done a really good job. You have put in a lot of effort. Just to finish off, any other comments, something that maybe you wanted to say and I stopped you or I forgot to ask about anything.

Te
I think learnership is great initiative and it was a lucky break to me because it taught me a lot of things and it opened doors for me in Insurance, and I just wish I can carry on doing that to others.

T
One other thing I wanted to do is I want to get your cell number because I want to follow up with you. I know the learnership is coming to the end now.

Te
Okay.

T
I just want to follow up to find out what's happening to you after the learnership, okay.

Te
Okay.

T
How can I be in touch with you?

Te
Its ----------.

T

That's wonderful. Te thank you so much for spending a little bit of time with me. I really and truly want to wish you well for your job, and for the test so that you can get your twenty hours and everything works out.

I am hoping when I phone you …

Te
I will be employed. Thanks Tatiana.

T
I am glad you had a good experience.

Te
Yes a nice experience.

T
Have you been for other interviews? Have you looked at other job offers?

Te
Not that much, I have been concentrating on this.

T
I hope it works out for you, take care and thank you.

Te
Thank you.

APPENDIX K: SKILLS DEVELOPMENT ACT LEARNERSHIP INFORMATION

http://www.inseta.org.za/legislation/default.asp?thepage=development_act.htm#4
Retrieved 15 May 2011

Extracts from the Act Relevant to Learnerships

SKILLS DEVELOPMENT ACT, No. 97,

8 No. 19420 GOVERNMENT GAZETTE, 2 NOVEMBER 1998

Purposes of Skills Development Act – from chapter 1 of the Act

2. (1) The purposes of this Act are—
(a) to develop the skills of the South African workforce—
(i) to improve the quality of life of workers, their prospects of work and labour mobility;
(ii) to improve productivity in the workplace and the competitiveness of employers;
(iii) to promote self-employment; and
(iv) to improve the delivery of social services:
(b) to increase the levels of investment in education and training in the labour market and to improve the return on that investment:
(c) to encourage employers—
(i) to use the workplace as an active learning environment;
(ii) to provide employees with the opportunities to acquire new skills;
(iii) to provide opportunities for new entrants to the labour market to gain work experience; and
(iv) to employ persons who find it difficult to be employed;
(d) to encourage workers to participate in leadership and other training programmed;
(e) to improve the employment prospects of persons previously disadvantaged by unfair discrimination and to redress those disadvantages through training and education;
(f) to ensure the quality of education and training in and for the workplace;
(g) to assist
(i) work-seekers to find work;
(ii) retrenched workers tore-enter the Labour market;
(iii) employers to find qualified employees: and
(h) to provide and regulate employment services.

Those **purposes are** to be achieved by—
(a) establishing an institutional and financial framework comprising—
(i) the National Skills Authority;
(ii) the National Skills Fund;
(iii) a skills development levy-grant scheme as contemplated in the Skills Development Levies Act;
(iv) SETAS;
(v) labour centres; and
(vi) the Skills Development Planning Unit;
(b) encouraging partnerships between the public and private sectors of the economy to provide education and training in and for the workplace; and
(c) co-operating with the South African Qualifications Authority.

CHAPTER 4
LEARNERSHIPS

Learnerships

16. A SETA may establish a learnership if—
(a) the learnership consists of a structured learning component;
(b) the learnership includes practical work experience of a specified nature and duration;
(c) the learnership would lead to a qualification registered by the South African Qualifications Authority and related to an occupation; and
(d) the intended learnership is registered with the Director-General in the prescribed manner.

Learnership agreements

17. (1) For the purposes of this Chapter, a "learnership agreement"' means an agreement entered into for a specified period between—
(a) a learner;
(b) an employer or a group of employers (in this section referred to as "the 5 employer"); and
(c) a training provider accredited by a body contemplated in section 5(1 *)(a)(ii)(bb)* of the South African Qualifications Authority Act or group of such training providers.
17. (2) The terms of a leamership agreement must oblige—
(a) the employer to
(i) employ the learner for the period specified in the agreement;
(ii) provide the learner with the specified practical work experience; and
(iii) release the learner to attend the education and training specified in the agreement;
(b) the learner to
(i) work for the employer; and
(ii) attend the specified education and training; and
(c) the training provider to provide—
(i) the education and training specified in the agreement; and
(ii) the learner support specified in the agreement.
17. (3) A leadership agreement must be in the prescribed form and registered with a SETA in the prescribed manner.
17. (4) A learnership agreement may not be terminated before the expiry of the period of duration specified in the agreement unless—
(a) the learner meets the requirements for the successful completion of the learnership;
(b) the SETA which registered the agreement approves of such termination; or
(c) the learner is fairly dismissed for a reason related to the learner's conduct or capacity as an employee.
17. **(5)** The employer or training provider that is party to a learnership agreement may be substituted with—
(a) the consent of the learner; and
(b) the approval of the SETA, which registered the agreement.
17. (6) A SETA must. in the prescribed manner, provide the Director-General with a record of leadership agreements registered by the SETA.

Contract of employment with learner

18. (1) If a learner was in the employment of the employer party to the learnership agreement concerned when the agreement was concluded, the learner's contract of employment is not affected by the agreement.
18. (2) If the learner was not in the employment of the employer party to the learnership agreement concerned when the agreement was concluded, the employer and learner must enter into a contract of employment.
18. (3) The contract of employment with a learner contemplated in subsection (2) is subject to any terms and conditions that may be determined by the Minister on the recommendation of the Employment Conditions Commission established by section 59(1) of the Basic Conditions of Employment Act.
(18. 4) Chapters Eight and Nine' of the Basic Conditions of Employment Act apply, with the changes required by the context, to a determination made in terms of subsection (3) except that—

(a) for the purposes of section *54(3)* of that Act, the Employment Conditions Commission must also consider the likely impact that any proposed condition
(b) section *55(7)* of that Act does not apply.
18. (5) The contract of employment of a learner may not be terminated before the expiry of the period of duration specified in the learnership agreement unless the learnership agreement is terminated in terms of section 17(4). (6) The contract of employment of a learner terminates at the expiry of the period of duration specified in the learnership agreement unless the agreement was concluded with a person who was already in the employment of the employer party to the agreement when the agreement was concluded.

1, Chapters Eight and Nine of the Basic Conditions of Employment Act ("BCEX'), provide for the publication of sector determinations by the Minister on basic conditions of employment on the advice of the Employment Conditions Commission. Before the Commission advises the Minister on the publication of u dissemination: (a) the Department of Labour conducts an investigation and prepares J report: (b) the Commission then considers the report in the light of a number of factors set out in section 54(3) of the BCEA and in this press may hold public hearings; and then (c) gives its advice in a report to the .Minister. The effect of this section is to allow for the setting of terms and conditions of employment for Learners in a similar way to the setting of conditions of apprenticeship under the Manpower Training Act. 1981 (Act No. $6 of i 98]). i; so far as conditions of employment are concerned-see section 13(2)(c) and (k) to *~p}.* The provisions of the BCEA are sufficiently flexible to JIIOW for sector and cross-sector determinations for learnerships

Disputes about learnerships
19. (1) For the purposes of this section a "dispute" means a dispute about—
(a) the interpretation or application of any provision of—
(i) a leadership agreement;
(ii) a contract of employment of a learner; or
(iii) a determination made in terms of section 18(3):
(b) this Chapter; or
(c) the termination of—
(i) a learnership agreement; or
(ii) a contract of employment of a learner.
19. (2) Any party to a dispute may in writing refer the dispute to the Commission for Conciliation, Mediation and Arbitration established by section 112 of the Labour Relations Act, 1995 (Act No. 66 of 1995).
19. (3) The party who so refers the dispute must satisfy that Commission that a copy of the referral has been served on all the other parties to the dispute.
19. (4) The Commission must attempt to resolve the dispute through conciliation.
19. (5) If the dispute remains unresolved, any party may request that the dispute be resolved through arbitration as soon as possible.
19. (6) The law that applies to the lawfulness and fairness of a dismissal for a reason related to an employee's capacity or conduct applies to a dispute contemplated in subsection (1)(c)(ii).