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# Unit standards and organisational training in the financial services industry.

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# UNIT STANDARDS AND ORGANISATIONAL TRAINING IN THE FINANCIAL SERVICES INDUSTRY

Research project for the degree of Masters in Education

Education Faculty, University of the Witwatersrand.

August, 2010

Linda Master

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## Declaration

I declare that *Unit Standards and Organisational Training in the Financial Services Industry* is my own work, except where indicated, and that it has not been submitted before for any degree or examination at any university. It is submitted in fulfilment of the requirements for a master's project for a Masters Degree in Education (Course Work) at the University of the Witwatersrand, Johannesburg.

Signed:

Linda Master

August, 2010

## Dedication

To my family without whom I would have given up long ago. And to my supervisors, who provided me with guidance and leadership that have helped forge my opinions of education and in turn serve as a reference point in all matters educational.

ACRONYMS

| | |
|---|---|
| NQF | The National Qualifications Framework |
| SAQA | The South African Qualifications Authority |
| SGB | Standards Generating Body |

# ABSTRACT

This research report investigates the way that course designers in the financial services industry use and engage with unit standards. The origins of unit standards, theories drawn from the sociology of education, and interviews with course developers jointly contribute to understanding how unit standards are received and used within an organisational context. Eight informal interviews were conducted with self-employed course designers, to examine how they use unit standards when developing learning material in business contexts. These interviews indicated that course designers had many issues and concerns regarding these documents. Five course developers working in three large organisations in the financial services industry were further interviewed, formally, to establish how they use and engage with unit standards. The findings from both sets of interviews suggest that unit standards are used in a limited capacity in organisational course development in this industry, because they do not correspond to the training requirements of the respective organisations interviewed. However, unit standards are used in Learnership programmes, because a different training objective is pursued, namely a social justice and redress objective and not a business objective. Although the research indicates that course developers would welcome some kind of standardisation or regulatory system to direct course design, they are opposed to the existing design and structure of unit standards.



**Key Words**: Unit Standards, Learnerships, Organisational Development, Organisational Training, Knowledge Management.

# 1 INTRODUCTION TO THE RESEARCH REPORT

## 1.1 Introduction and Rationale

This research project is a product of questions raised when writing training materials based on unit standards that were introduced as part of the National Qualifications Framework (NQF). In common with many fellow South Africans, I received the NQF and the introduction of unit standards with sincere enthusiasm. The arrival of the NQF, with its values of redress, equality and equivalence, appeared to provide the much-needed direction necessary for transforming education and training in post-apartheid South Africa.

In due course, my work in corporate training and course development led me to develop training materials based on unit standards. Although I approached the tasks non-critically and with an open and receptive attitude, I increasingly felt that unit standards did not appear to provide the educational foundation which I had been led to believe they would. There were many concerns when working with them, which included concerns with the wording of the documents, the problem of aligning specific knowledge with the unit standard format, and trying to write materials according to an outcomes based education (OBE) format that required knowledge be assessed as measurable, behavioural outcomes.

The aim of this research was originally conceptualised during one of many periods of doubt concerning unit standards, resulting in a number of discussions with other course developers. The general consensus of those early discussions was an overall sense of confusion and uncertainty. At the time none of us had formal education qualifications as this is not a requirement of corporate training and development specialists, and we were therefore unable to explicitly verbalise our concerns further than vague comments like ‘confused’, ‘strange’ and ‘weird’ to mention just some of the more polite comments.

This research report is the final component of a coursework masters in education that has helped me personally to identify, examine and articulate many issues and concerns regarding the education of adults.

This research report will examine a small facet of the NQF, focusing on how course designers in the financial services industry use and engage with unit standards.

## 1.2 The Research Problem

The stated objective of unit standards is that they should guide assessors, learners and educational providers in the task of meeting the stated outcomes (Isaacs, 2000:8) of a qualification. However, arguments drawn from the sociology of knowledge (Gamble, 2004;

Wheelahan; 2005; Young, 2008) and data collected from this research report's multiple case studies suggest that unit standards cannot provide the kind of conceptual clarity necessary for structuring organisational courses. This research report attempts to reconcile arguments drawn from the sociology of education with SAQA's policy regarding unit standards. Equally important is to explore how organisations use unit standards when developing training courses.

## 1.3 The Purpose of the Research Project

The overall purpose of this research report is to investigate unit standards and how these documents are experienced by course designers in the financial services industry.. This research report was conceptualised in response to evidence from research and literature (Allais, 2007; Gamble, 2004) that suggests that unit standards may not be the best option for the design of workplace based training.

The research was undertaken using a two-pronged approach: firstly by exploring the attitudes of organisational course designers regarding unit standards, and secondly by attempting to contextualise unit standards, explain the influences behind their introduction, and to raise arguments from an educational perspective concerning their role in organisational course development and delivery.

## 1.4 The Research Question

There is one overarching research question in this research report, namely;

> 'How do corporate or workplace-based course developers use and engage with unit standards especially when designing learning programmes?'

This question will be addressed through other questions that are linked to the main research question. These questions guide the kinds of questions asked during the interviews, and direct the literature selection. Each of the three questions address issues and concerns relating to a specific aspect of the research. The three areas investigated through the minor questions concern;

- the origins and motivation for the introduction of unit standards onto the NQF,
- how theories drawn primarily from the sociology of knowledge contribute to understanding why this research report argues that unit standards are problematic, and
- the way that course designers have received these documents.

The overarching research question and the three minor research questions are addressed in Chapter 2 - Methodology.

## 1.5 Research Context

Unit standards were introduced into almost all industries in South Africa, and for this reason the scope for research is very wide. In order to provide a focused investigation in which respondents work with similar unit standards, the research concentrates on the use of unit standards in a single industry. The financial services industry was selected, mostly for pragmatic reasons, as it is an area in which unit standards are widely used; and many course developers have long-term experience with these documents.

The literature for this research report focuses primarily on unit standards and an education-focused response to these documents. Literature on knowledge was included to present arguments from an educational perspective, as a response to the tendency for unit standards to foreground outcomes and standards while de-emphasising underpinning knowledge. Literature concerning the design of organisational courses, and course design in general was not examined for this research report, as the research is directed towards understanding the issues and debates concerning unit standards and course designers' responses to unit standards.

Through investigating the experiences of course designers when using unit standards, it may be possible to understand how South African Qualifications Authority (SAQA) policy is experienced by the very people these documents were designed for.

## 1.6 Report Relevance

This research is of particular importance because of the changes made by SAQA to workplace training through the introduction of the NQF and the related unit standards. Little research has been done on how these unit standards are used in the 'real world' and the extent to which course designers are able to successfully use them. Due to the limited size of this research report it cannot hope to investigate all of the many facets involved in the use of these documents in the training and development context. Therefore this research report has focused on threading together theories drawn from sociology of education, political and economic influences on educational policy and interview data, to sketch a picture of how course designers use unit standards.

## 1.7 Previous Studies and Pilot Interviews

A number of previous studies on the NQF and Outcomes Based Education (OBE) that include unit standards have been undertaken. Some of the studies that have influenced this research report are briefly discussed here.

The reading of previous studies began with the work of Allais (2007) which explores the implications of the NQF in South Africa. This doctoral thesis argues that unit standards are designed outside of an educational context (Allais, 2007:196) or traditional qualification structure (Ibid:206) consequently resulting in very long documents with complex terminology that are difficult to read (Ibid:199). Allais argues that unit standard-based qualifications are long, involved and over-specified (Ibid:211-14) and are therefore highly problematic in their existing structure for promoting educational transformation on the NQF.

Arguing against unit standards from another point of view is Jeanne Gamble (2004) who examines OBE from the perspective of craft acquisition. Gamble explores the traditional methods of acquiring the skills necessary to become a carpenter from a traditional perspective, and then contrasts this with the implications of introducing a unit standard-based OBE approach to acquiring a carpentry qualification. Among Gamble's many arguments against using OBE in the teaching of craft is one significant concern that resonates with this research report, namely the difference between tacit and explicit knowledge. Essentially Gamble argues that tacit or implicit knowledge cannot be acquired explicitly (Ibid:1), but that tacit knowledge emerges through engagement with a particular practice and under the guidance of a master craftsman (Ibid).

Other large studies that helped frame this research report include the 'Report by the Study Team on the Implementation of the NQF' – which is a joint publication by the Departments of Education and Labour (2002). This argues in favour of OBE and using unit standards but indicates that they are complex, difficult to interpret and are not implemented in the way in which they were initially intended to be used.

Other research sponsored by Umalusi (2006; 2007), examines the use and implementation of unit standards in Further Education and Training. Drawing on their own research, Umalusi suggests that the use of unit standards is contested and worthy of further investigation.

This research report began by conducting some informal pilot interviews with course designers working as independent consultants to the financial services industry. These discussions suggested that the majority of interviewees struggled to engage constructively with unit standards, and use various approaches to include unit standards into their course design when necessary. These initial interviews were sufficient to indicate that formal

research into the use of unit standards in the workplace was worth investigating. The data from the informal and formal interviews is discussed in Chapter 4.

## 1.8 Brief Outline of the Research Methodology

This research began by researching and reading literature that represented issues and concerns involving unit standards or theories of knowledge. The exploratory pilot interviews as mentioned above were used to formulate the approach for the research report and to further define the interview questions. Eight informal interviews were conducted to establish if the interview questions would provide sufficient data and more importantly, if there was a basis for conducting the research.

The research data for this research report is presented as a multiple case study consisting of three recorded and transcribed interviews. Three interviews were conducted with a total of five course developers interviewed. The one case study consisted on only one person; the other two had two interviewees present. The interviews were based on a carefully designed questionnaire. The interviews were semi-structured thereby allowing participants to express their opinions and explore issues that were not on the questionnaire. However, all interviewees addressed all the questions listed on the questionnaire. The outcome of this approach to interviewing participants is that it is possible to compare answers to specific questions as well as identify issues of personal concern for each participant.

The next stage in the research consisted of selecting the texts for the literature review and identifying themes to use in the data analysis. The background to the introduction of unit standards in South Africa is investigated, including local and international influences and trends in competency based education. Arguments from the sociology of education are also drawn on as this directs the research focus onto educational concerns regarding these documents.

This research report is designed to engage with the themes identified in the literature and relate these to the data obtained from the multiple case studies.

## 1.9 The Literature Review

The literature review for this research report has been arranged thematically into two main sections. The first section examines the origins of unit standards drawing on international and local literature. The vast majority of papers presented in this section argue the case for the introduction of unit standards. This section includes literature on the values that unit standards are designed to encapsulate, particularly social values of redress and social justice (SAQA – NQF Overview. www.saqa.org.za). This section of the literature review will show

that unit standards are essentially socio-political documents designed primarily to transform the educational landscape of South African within the framework of the NQF (Parker and Harley, 2007:20).

The literature selected for this research report aims at developing education-based arguments about unit standards, and to examine specifically the factors that influenced the introduction of unit standards and the ideas in support of their use in organisational training. There is no singular influence on educational transformation in South Africa and therefore the literature examines the political, social and economic factors - both local and international, that have played a role in their introduction. The literature review will argue that unit standards are not documents that emerged in response to educational considerations. They emerged in response to a political agenda, namely one of social transformation and redress (SAQA website, www.saqa.org.za). The literature drawn from works in the field of sociology of education attempts to examine unit standards from an educational perspective, while drawing on political and social roots to position the literature.

The first section also introduces the literature that argues from a number of different perspectives, that unit standards are problematic and contradict the explicit purpose of education, namely to acquire knowledge and understanding (Young and Gamble, 2006:4).

The second section of the literature review examines literature drawn from the sociology of knowledge. This approach was adopted to provide arguments that explain how experts view the organisation of knowledge, particularly arguing that there is a structure to knowledge, and that it requires distinct conditions for its transmission. This literature is necessary for building an argument that unit standards may meet the social and political objectives of the NQF, but fail when examined through an educational lens.

From a theoretical perspective, this section of the literature review draws heavily on the work of Rob Moore (2004) in his book '*Education and Society'.* Moore has focused on the way in which knowledge is organised in educational contexts. Sociology of knowledge as a field of expertise emphasises the importance of the social organisation of knowledge, that knowledge has a structure and its acquisition is dependent on the manner in which it is made available for acquisition.

This research report has sourced literature relating to the implementation of unit standards in South Africa and other countries where similar systems are used. The literature review will address issues and debates regarding the implementation of unit standards, with a focus on workplace teaching and learning.

## 1.10 Scope, Limitations and Assumptions of this Research report

The scope of this research report has focused on the use of unit standards in course design. The research report scope does not include the design of assessment tasks or specific planning for training sessions. This research report has attempted to outline some of the leading theories of knowledge, and to explore how individual course developers and trainers conceptualise their own knowledge or determine how knowledge is organised in their areas of speciality. The interviews conducted in this research report are exploratory in nature, and are limited by the small number of participants.

An obvious limitation concerning the small number of course developers interviewed, is that the research report cannot hope to draw conclusions that apply to unit standards based education outside of the immediate research parameters of this research report. However, the personal reflections and insights of these individual course developers provide data on how individuals engage with unit standards when designing occupationally specific learning material and therefore the research is valid in and of itself. The data obtained from the interviews, when analysed according to the themes identified in the literature review, can provide useful data about how unit standards are perceived in the workplace, thereby increasing access and understanding to how education in the workplace is conducted.

## 1.11 Overview of Research Report

This section will briefly outline the content and structure of the remaining chapters in this research report.

The research methodology for this research report is discussed in Chapter 2. The rationale behind the selection of the multiple case study approach is discussed, together with the criteria for selecting the literature presented in the literature review.

Chapter 3 of this report contains the literature review which provides a background to unit standards in South Africa. This chapter introduces SAQA and explains the case for the introduction of unit standards from SAQA's point of view. It systematically explains how SAQA policy envisaged unit standards guiding the design process of developing training materials. The literature review also includes arguments against the use of unit standards as a delivery mechanism for educational transformation.

Also included in the literature review is a section on literature selected from the sociology of knowledge that articulates how knowledge is organised. These arguments from experts in the sociology of knowledge are necessary in order to frame the discussion about unit standards within an educational context.

Research findings are addressed in Chapter 4. Three semi-structured interviews with five course designers were conducted and the results analysed using the content from the literature review as an analytical framework. The comments and insights offered during the interviews points towards the complexity of issues that workplace based trainers and developers grapple with on a daily basis, when working with unit standards in course design.

Finally, Chapter 5 summarises the findings of this research report and draws some conclusions relating to the analysis of the data. Some recommendations are made, together with suggestions for further related research.

# 2 METHODOLOGY

## 2.1 Introduction

This chapter focuses on the methodology used in this research research report and introduces, justifies and discusses the salient features of the research approaches selected to address the research questions introduced in the previous chapter.

This research report was initiated as a way of addressing questions about unit standards. What started as an intuitive feeling that something was not quite right with unit standards has turned into an examination of the relevant literature followed by a focused investigation into the experiences of people working with unit standards in organisation. The experience and insight of course designers participating in the interviews provide invaluable information concerning the way course designers engage with unit standards. For this reason, a case study methodology was selected. The case studies provide the primary data for interpretive, qualitative research, while the literature review and conceptual theory provided an analytical framework.

## 2.2 Relevance and aims of this research

This research contributes to debates concerning the role of unit standards in education and training in South Africa.

By researching the attitudes and strategies that course developers adopt when working with unit standards, it becomes possible to develop an understanding of how course developers engage with unit standards and access the strategies they draw on to integrate OBE, unit standards and course content. Acquiring some clarity on the experience of course developers offers insight into how SAQA's policy concerning OBE and unit standards is experienced in the workplace.

Furthermore, it is the objective of this research report to investigate how the interpretation of unit standards could impact on the design of unit standards-based courses.

This research hopes to explore the way that course developers use and engage with unit standards during the course design process. Through this exploration, their treatment of course content and the organisation and selection of knowledge content is investigated.

## 2.3 Research Question

There is one overarching research question in this research report, namely;

'How do corporate or workplace-based course developers use and engage with unit standards especially when designing learning programmes?'

This question will be addressed through other questions that are linked to the main research question, and in turn, helps drive the research trajectory (Bassey, M, 1999:67). These questions guided the kinds of questions asked during the interviews, and directed the literature selection.

These questions are;

1. What are unit standards and why were they introduced as part of the NQF, and how do they influence course design in the financial services industry?
2. How do course developers use unit standards to engage with knowledge, and how do they address the question of knowledge in the process of course design?
3. How can theories drawn from the sociology of knowledge, assist in developing an explanation about why unit standards are a problematic starting point for course design.

## 2.4 Research Design: Multiple Case Study

This multiple case study aims to evaluate the opinions and experiences of course designers working with unit standards. This methodology allows for data collection to focus intensively on a limited number of interviewees, and in doing so, provides an opportunity to understand how these interviewees engage with unit standards. In this respect, a multiple case study methodology allows for an opportunity to evaluate unit standards and draw conclusions based on the literature, about their role in organisational course design.

### 2.4.1 Quantitative or Qualitative Research?

A qualitative research method was selected in accordance with trends in educational research (Worthen and Sanders, 1985:50) that argue in favour of small, in-depth multiple case studies. It offers an opportunity to access course designers and to explore how unit standards have influenced their work. The research questions establish the boundaries of the research and help define the research trajectory (Bassey, 1999:67-8), namely to investigate the viewpoints of those engaging with unit standards in the workplace.

A qualitative interview schedule is flexible enough to accommodate additional probing questions that arise as a result of the information provided by the subject. Yin (2004: 3) argues that the qualitative case study researcher is in a continual process of data collection and analysis during the interview. The combination of interviewing flexibility guided by research parameters, allows for rich data to be gathered.

In this respect this research report was jointly exploratory and evaluative (Bassey, 1999:63), drawing on reliable quantitative research methodologies, that address the nuanced comments of the participants in the multiple case study. This kind of research, namely a multiple case study, is methodologically valid, yet yields different data to that of a quantitative study. Quantitative research would not yield the type of data required for this research report, namely to explore and evaluate the experiences of course developers who use unit standards.

A positivist approach, namely one that pursues a scientific, quantitative line of enquiry, did not meet my research objectives. This is because even though there is a role for quantitative data when researching organisational practices (Worthen and Sanders, 1985:51), research involving structured, quantifiable questions cannot adequately capture the viewpoint of the interviewees required for this research.

### 2.4.2 The Multiple Case Study

A case study methodology offers an opportunity to engage with individuals working on a daily basis with the very materials that are the focus of this research, namely unit standards. Research into unit standards requires access to course developers immersed in workplace contexts that have been exposed to unit standards. Essentially the case study methodology allows for the research lens to focus on a defined area, especially when the context cannot be separated from the individuals acting within it (Merrian, 1992:29).

A case study methodology allows for in-depth, context based investigation of a pre-defined area (Ibid:19). A case study primarily involves qualitative research, as the emphasis is on gathering data regarding the opinions and experiences of the participants (Ibid). Therefore, a case study also provides a context for the interviewees to express themselves and to offer their views on unit standards. Because the interviewees are part of a broader context, in this case, the organisation, their opinions can be viewed as representative of their context and also provide insight into how unit standards are received and experienced (Blaxter, Hughes and Tight, 1996:61). Furthermore, in-depth dialogue concerning the insights and experiences of the interviewee results in data with a high level of validity within the context of the research (Mouton, 2001:150).

Even though the interview sample is small Merrian (1992:19) argues that the value of a case study lies in its capacity to ‘gain in-depth understanding’ of a particular context or concept. In conclusion, the research objectives of the research report also play a role in identifying the methodological trajectory. For this research report, a multiple case study approach satisfies the research objectives, namely to meet course developers and to listen to their ideas and experiences in course development.

A multiple case study was selected as a single case study would not meet the research objectives of this research report, namely to explore the experiences of several course developers working with unit standards. The aim of the research was to investigate the opinions of course developers in different organisations to gauge their views and experiences with unit standards. Three organisations were contacted for this purpose. In the end, five people were interviewed for the formal data gathering process for this research report.

### 2.4.3 Limitations of a Case Study Approach

One disadvantage of this research report is the limited number of interviews conducted for the multiple case study. This can curtail the opportunity to draw on this data as a means to generalise to a broader context (Merrian, 1992:41). However, where the data from the case studies provides insightful information and description, the reader can use this to decide if the data resonates in other contexts as well (Maykut and Morehouse, 1994:47). Even though the data may not be accurately reproduced, should a similar study be suggested, the data from this study can provide formative material for large-scale quantitative or qualitative research, should it be required.

The arguments against using case studies suggest that case studies are not representative, not broad enough and could be subject to the researchers' bias (Maykut and Morehouse, 1994::43). Furthermore, case studies as a methodology are unsuited to research that requires prediction as part of the research outcome (Ibid). However, prediction is not an objective of this research report, rather, this research report seeks to understand how course designers use and engage with unit standards.

In conclusion, arguments against case studies need to be acknowledged, especially with regards to the design and analysis of data. However, the main reason that a case study is selected for this research is in order to deliberately move away from a quantitative research paradigm, into areas where phenomena can only be accessed and understood through engaging with those intimately involved with research area (Ibid:19). It is their insights and their meaning-making that is important to this research.

## 2.5 Research Methods

This section will explain and describe the selection and organisation of the literature and the research methods involved in collecting data for the literature review and the multiple case study. Thereafter I will look at methods used to analyse and interpret the collected data.

Crotty (1998:3) defines methods as the 'techniques or procedures used to gather and analyse data'. The methods used to develop this multiple case study include the development of a questionnaire, recorded interviews, transcripts of interviews, and data analysis.

### 2.5.1 The Organisation of the Literature Review

The literature review is designed according to the 'conversation approach' (Merriam and Simpson, 1995:43). The style is conducive for introducing and explaining topics that are relevant to the research. The literature is organised into two main sections; namely literature that focuses on unit standards or competency-based training, and then literature that concerns the organisation of knowledge.

The literature review begins by introducing unit standards and addresses literature that focuses on their introduction into South African education. Once the origins of unit standards are discussed, literature arguing in favour or against them is addressed.

Textual data is critical for creating a language of description that explains why unit standards are problematic. For this research, only the theoretical texts that were concerned with the organisation of knowledge were selected for the conceptual framework. This section addresses some of many theories about the organisation of knowledge in order to give the reader some idea of the scope of literature available in this area. Some conceptual arguments from the sociology of knowledge were selected, specifically focusing on the work of Rob Moore. This field is concerned with how knowledge is organised, acquired and reproduced.

Sources of data included books, journal articles and information primarily downloaded from the internet, like the SAQA website, the websites of the Department of Education and the Department of Labour.

### 2.5.2 The Questionnaire

The questionnaire as a research tool was developed with open questions designed to stimulate a discussion about unit standards in the workplace. Each question was designed to address a particular area of interest or concern. Almost all the questions were open-ended and exploratory (Mouton, 2001:149) allowing the interviewees to answer the questions in detail and according to their opinions.

When planning the questionnaire, it was clear that just asking questions in a structured interview style would deprive the interviewees of expressing their viewpoints, and therefore a semi-structured interview technique (Hitchcock and Hughes, 1989:81) was selected, as it

allows the questionnaire to guide the conversation, yet remains flexible and open to opinions and insights. This kind of flexibility was necessary as it was difficult to predict how the interviewees would respond to the topic. Semi-structured interviews allow for probing and expansion during the interview (Ibid). Semi-structured interviews are also favoured by Scott and Morrison (2007:1) when applying abduction theory as a supporting theory in data analysis as used in this research report.

The questions were developed as a result of topics raised during the development of the literature and information obtained through the informal interviews. The literature review addresses the unit standard phenomena from a number of different perspectives, which include theories of globalisation, theories of knowledge and literature on unit standards. Questions that reflected the literature were necessary in order to establish a connection between the contextually based experience of course writers and the claims outlined in the literature.

All interviews were recorded and later transcribed by myself, after which the data was extracted from these transcriptions. A copy of the questionnaire is attached in the appendix to this document.

The same questions were asked of all the interviewees. Each interview was unique in that each company held different business and organisational objectives which were reflected in the interviewee's responses. Although the questionnaire is the primary research tool used in this research, the emphasis placed on the continual process of data gathering and analysis during the interview process was adhered to (Yin, 2004:3).

## 2.6 Introducing the Formal Case Studies

The data for this research report was obtained from three case studies. All five interviewees worked in one of three organisations in the financial services industry and at the time of the interview were all involved in course design, training and development in their respective organisations. The number of employees in the organisations ranged from 700 to 3000 people.

The information provided in this section is designed to introduce the participants, to provide a background to the case studies, and to mention any significant aspects in the interviews that can help frame the interpretation of the data. Each company's training approach is briefly addressed at the end of this section.

Of the three interviews, Blue House Financial Services was the only interview with just one participant. The other two interviews, Red Planet and Evergreen, had two people participating in each interview. Because of the small sample size it is difficult to speculate if

the outcome of the interviews would have been different if each individual had been interviewed alone.

All the names of the interview candidates and companies have been changed.

### 2.6.1 Blue House Financial Services

Blue House Financial Services is the smallest of the three companies used for this research report. It has operated in the South African market for more than 15 years. The head of the organisation's human resource division was interviewed. 'Jim' is in his late 40's and has worked for Blue House for more than 10 years. As the head of the HR division, he is able to make all the policy decisions regarding the development of the employees in the organisation.

We met in the company boardroom and from the start the interview flowed with an easy openness that was not to be repeated with the other two interviews. He was able to articulate the difficulties experienced by the company in trying to integrate unit standards into a packed programme of organisational development. The manner in which he and his team negotiate the issues surrounding OBE, unit standards and company training needs will be addressed throughout this chapter. On the whole, he was the least enthusiastic about using unit standards as a means to drive workplace training.

### 2.6.2 Red Planet Financial Services

This is the largest of the three organisations interviewed. Red Planet is a financial services provider with branches throughout Southern Africa. There are in excess of 3000 employees in the organisation. The head of the department was unavailable and when I asked if she could direct me to someone else in the company, she laughed and said that there were probably only five people who had any idea of what unit standards were, and they all worked for her! She eventually arranged for me to meet with two of her course designers.

'Rolene' and 'Karen' are two course developers and trainers in their mid-40s that work throughout Red Planet offering a wide range of training courses. They have worked together for more than five years and had a close and congenial working relationship. They have worked in the field of training and development for more than 15 years. They were both willing participants in the interview and were very clear about Red Planet's training objectives.

The course developers identified with Red Planet's organisational objectives and were aware of how their department interfaced with the organisation. They used unit standards

but only to the extent that they served the needs of the organisation. Rolene was especially outspoken and may have been more vocal with her opinions had she been alone.

### 2.6.3 Evergreen Financial Services

This organisation employs over 800 people, providing health, funeral and life insurance products to lower income clients. Their policies are cheaper than Red Planet's and Blue House, and their call centre staff need to communicate complex policy information in many of the country's official languages.

Of the three interviews, this one proved to be the hardest. Once again there were two course developers at the interview, 'Tina' the department manager (28 years old), and 'Amy' the course writer (35 years old) and Sue's subordinate. Throughout the interview it appeared as if Amy was under pressure to say the 'right' thing, as she continually rephrased her comments or corrected herself when she thought she had not answered the questions 'correctly'. Even when she was assured that there were no right or wrong answers, she hardly let her guard down.

Sue was much more open about her ideas, probably because she was the manager and did not feel threatened in expressing her opinions.

What sets Evergreen apart from Blue House and Red Planet, is that this organisation seemed to place compliance to unit standards-based training *above* the training needs of the organisation. Essentially, Evergreen's training department had only started this year (2009) designing courses without unit standards. Up until this shift, they had used unit standards as a starting point for almost all course design. This and other issues will be discussed in more detail later in this chapter.

### 2.6.4 Training Approaches

None of the companies interviewed followed any particular training model. To some extent they all followed some kind of outcomes approach, as training had traditionally defined upfront the competencies or skills that would be acquired through participating in a course. These 'outcomes' differed from unit standards-based outcomes regarding the level of specification involved in the course descriptors. In most cases, courses will be marketed to staff by highlighting the competencies or skills that can be gained through participation in the course. The traditional approach did not link courses to credits or qualifications.

An 'outcome' used in course design would simply describe the skill that could be acquired by stating that;

'at the end of this course the participant will be able to *identify* five different insurance products, *explain* their relevance to a home owner and a business owner, *and calculate* the premiums using the company's business system.'

This example gives a rough example of how the course designers would traditionally have used outcomes when structuring a course. These outcomes differ significantly from unit standard outcomes because the organisations do not describe the specifics of each outcome. The knowledge or training content necessary for that course is assumed to be expressed implicitly through the stated course training outcomes. At some level, the course designer, management, staff and course participants, all have some implicit understanding of how the training outcomes intersect with their workplace practice.

The NQF's unit standards that are under discussion in this research report, attempt to use language to explicitly describe every aspect of a course, skill or process using the language of outcomes-based education. This differs significantly from the example provided in the previous paragraph, which is a less structured and prescriptive.

Most of the training provided by the organisations concerns product or systems training and something called 'soft skills' training. Product and systems training involves learning about the types of products provided by the organisation, what they are and how they can be used by the client. Employees working in the financial services industry call centres are expected to have a working knowledge of company products, systems, chains of command, tax and financial benefits of a product, to name just some of the areas of expertise necessary.

The 'soft skills' are equally important, as employees are expected to know how to sell products, communicate efficiently, manage their time and administration effectively, to name just some of the skills required by proficient employees in the financial services industry. These skills are called 'soft skills' because they do not require education within a particular discipline or speciality for acquisition. Many soft skills highlight inter- or intra-personal behaviours that are necessary for interacting and working efficiently within an organisation.

The training departments in all three case studies regard their role as one that provides the essential knowledge and procedures necessary to function within the work environment. To reach this goal, they design courses tailored to organisation's specific requirements. In this respect it is essential that training departments can react quickly when analysing and addressing the training requirements of an individual or department within the company. Efficiency in providing training support ensures that employees within the organisation can operate with minimal disruptions.

## 2.7 Introducing the Informal Case Studies

Eight informal interviewees were sourced though using business contacts and referrals. A number of self employed course developers were approached and those who were willing to be interviewed were booked for interview time. The candidates who agreed to be interviewed did so voluntarily and were not pre-screened to establish their attitudes to course development or unit standards.

These informal interviews were sourced through a privately run consultancy that specialised in recruitment and brokering of training contracts for organisations and consultants. For this reason they had many course developers on their books and were happy to provide the contact information. They provided a list of over 30 contacts and from that list five interviews took place, with a total of eight people interviewed. Four of the interviews were with individuals and one of the interviews was with a team of four people working in course development or allied areas.

All the candidates worked as consultants or as owners of small training and development businesses. They have worked in diverse commercial areas, that includes finance, banking and large and small private and listed companies. Although the interviewees worked in different fields, had diverse socio-economic backgrounds, they were identifiable as a definable group whose members engage in the practice of course writing and development.

Of the eight candidates, seven were white females and one black male. All the interviewees were in the age group 30-40 years old.

### 2.7.1 Fieldwork – The Interview Process

There are two phases in the interview process. This section briefly outlines how the initial preparatory interviews helped shape the questionnaire and the structure of the formal interview process.

#### 2.7.1.1 Preparatory/Informal Interviews

The original pilot interviews were done as a means to prepare for the formal interviews and to establish if there was a basis for continuing with the research. These initial interviews indicated quite strongly that the role of unit standards was contested in the business world and that the research should proceed with the formal interviews.

The informal preparatory interviews were not recorded, and only handwritten notes were taken. The data from these interviews is placed in a separate section to the formal interviews in the data analysis chapter (Chapter 4). The Data Analysis chapter is organised

into three main claims developed from themes emerging from the formal interviews, and the informal interview data is discussed briefly under each claim in a separate section.

These interviewees will not be introduced nor described like those participating in the formal interviews, instead, when their comments are quoted in the data, they will be provided with a name. This is because the informal data was recorded as field notes and therefore lacks the depth of the recorded formal interviews.

#### 2.7.1.2 Formal Interviews

Unlike in the case of the informal interviews, all the formal interviewees worked for large, well established organisations. They were selected and contacted through information provided on the INSETA (Insurance Seta) website. This proved to be a reliable method of recruiting interviewees, as all the companies and individuals listed on the website are accredited by the INSETA. This suggested that the interviewees have some knowledge of, and experience with, unit standards.

Even though the same questionnaire was used for all three formal interviews, each discussion is slightly different, as the questionnaire was designed to accommodate flexibility and to initiate discussion and thoughts about unit standards. Therefore deviating from the questionnaire could not be avoided, but at all times the objectives of the research informed the trajectory of questions and comments made by the interviewer.

All these interviews were recorded and transcribed. After the completion of each interview field notes were written reflecting thoughts and feelings regarding the interview (Miles and Huberman, 1994:76). This was helpful during the data analysis as the notes provided background information necessary for explaining the experiences of the interviewees.

### 2.7.2 Interview Techniques

The overall approach to these interviews was to adopt the perspective of the interviewee as a research collaborator (Mishler, 1986:126) in that the questions asked during the interviews generated reflection on behalf of both the interviewee and interviewer. Discussion generated refection about workplace practice, and challenged the perceptions of all parties. However I attempted not to disclose or reveal an agenda regarding the role of unit standards in workplace practice.

The interview process involved asking questions about how course developers interpret unit standards when developing courses. John Heron's (1981:19) discussion on cooperative inquiry influenced the interview process, because the interviews offered an opportunity for me to develop a deeper understanding of how unit standards are used and interpreted. Approaching interviews with Heron's (1981:22) 'intentionality' as an explicit interview

technique allowed the interview process to help further my understanding of how unit standards are perceived and also to establish if there was any substance to my concerns about unit standards (Heron, 1981:22)).

I also needed to establish my credibility and develop a rapport with the interviewees in order to develop an immediate working relationship that would allow the interview to flow. For this reason it was imperative that I disclose what I did and discuss my research topic in general terms. When introducing myself and my research I mentioned that I had had problems with interpreting and understanding unit standards and this research was an attempt at finding out why unit standards seemed to be so problematic. Just a simple introduction like that seemed sufficient to engage in stimulating dialogue with the interviewees.

To some extent I gravitated towards a reciprocal approach to research (Lather, 1986:263), suggesting that the interviews were conducted in a context of mutual understanding and shared experiences. Everhart, in Lather (1986:263) focuses on shifting the researcher from stranger to 'friend', and in doing so, helps increase access to meaningful data. Although I did not try and promote myself as a 'friend' to the interviewees, I did indicate to the interviewees that I was working in the same field as them and dealing with the same issues. For this reason it was extremely important to be perceived as honest and forthright. I did not want to risk my personal reputation should they leave the interview feeling I was trying to extract information, to further my personal business agenda. Revealing this kind of information is also important when dealing with ethical values, which are also discussed in this chapter.

All formal interviews were recorded and transcribed. The informal interviews were recorded in note form during the interviews.

### 2.7.3 Data Analysis

Abduction theory provides the underpinning theory for the development of the data analysis for this report. Abduction theory is a method of reasoning that attempts to provide explanations for data or phenomena (Scott and Morrison, 2007:1). It provides a meaning-making platform for interpreting the data. This approach to data analysis accommodates the interrelationship between the individual and the context within which they function. Using this theory, it is possible to incorporate individuals' 'intentions, reasons and motives' (Ibid) as a viable source of meaning and as a legitimate means of analysing data to provide meaning and explanations for phenomena.

The analysis of the data from the multiple case studies follows Merrian's (1992:194-5) approach of conducting a two-stage analysis. First a *within-case analysis* is conducted on the

data, and then a *cross-case analysis* extends the process by comparing and contrasting the evidence from the different interviews (Ibid).

For this research report, the data is interpreted according to categories developed from the literature review. This was done to ensure a level of validity in the interpretation of the data, but also to establish interpretative categories that interlace the literature review with the field work.

This report accepts that there are many possible approaches to researching the opinions of people using unit standards. The value of drawing on abduction theory, is that it acknowledges explanations of events, provided there is sufficient evidence in the form of interview data or literature to support the claims.

The objective of the analysis is to link the research questions, literature review and fieldwork into a cohesive discussion that sheds light on the objectives of this research, namely the experience of using unit standards during workplace-based course design.

The analysis needs to accommodate the numerous facets of the research namely, the questionnaire, researcher bias, field notes, data transcripts and evidence from literature.

However the interpretation of the interview data essentially concerns accessing and understanding the meaning and value that the interviewees attribute to unit standards in the workplace context. Their 'intentions, reasons and motives' (Ibid) will be compared and contrasted to some of the claims addressed in the literature review.

## 2.8 Strengths, Weaknesses and Scope of the Research

In this section I focus on issues of subjectivity, explaining how an apparent 'weakness' can be transformed into a constructive foundation for informative, qualitative research.

### 2.8.1 Acknowledging my Subjective Opinions

Of concern when developing the research strategy was how to conduct reliable and valid research when I had existing or preconceived concerns about the viability of unit standards. To what extent could I engage with the topic in a non-judgmental, neutral and fair way in order to give the case for unit standards a fair chance? Lather (1986:258) argues that values cannot be factored out of research and that research is never value free. Recognising my own concerns towards unit standards acted as a catalyst for entering into this research. Peshkin(1988) also acknowledges the role of unavoidable subjectivity in social science research.

My own questions about unit standards provided the initial trajectory of questioning and literature review. However, in order to create a balanced and fair investigation into unit standards, it became imperative to express the view of SAQA and to offer clear markers as to the origins and motivations behind the introduction of unit standards. It is hoped that this objective was met in the literature review.

Because the number of interviews is limited, it allows for in-depth interviewing and discussion, as well as allowing the interviewees to add their own ideas and thoughts to the research. During the interviews I followed Peshkin's (1988:18) method of continually monitoring my feelings and reactions to the interview topics. I tried at all times not to appear to collude with those expressing concerns about unit standards, nor present any kind of negativity towards those who favoured unit standards.

The research report's weakness, meaning my subjectivity, could also be interpreted as a strength as it provoked curiosity about unit standards and their impact on teaching and learning in the corporate environment. If I had not had an opinion about unit standards, I would not have been motivated to research this area. Subjectivity is therefore an opportunity to contribute knowledge about an area of personal interest (Peshkin, 1988:18).

Lather (1986) argues from a post-positivist perspective that value-free, 'scientific' data that is free from personal bias cannot occur. Post-positivist research also questions the boundaries of what is meant by validity arguing that positivist 'value free' research is not value free, but instead research reports a perspective that reflected the values of a specific class or standpoint (Ibid:270). Even when there is an attempt to articulate the values that drive the research, there is still a danger that personal bias can influence the validity of the data gathering process (Mouton, 2001:150). Every attempt has been made to counteract subjectivity by trying to retain a high level of self-awareness during the interview and analysis process, and it has remained in the foreground throughout the research report.

### 2.8.2 Scope

The scope of this research report is narrow in that the focus is only on unit standards as they are used in the financial services industry and only in workplace contexts. The scope of the research was defined by the research question, and that has provided the boundaries for the fieldwork and literature review.

## 2.9 Issues of Validity and Reliability in the Research Design

Validity was a concern when designing this research, specifically with regards to qualitative methodology. A small, multiple case study cannot be expected to represent the many

thousands of people engaging with unit standards on a daily basis in corporate contexts. Yet this exploratory research attempts to shed some light into the experiences of course designers involved with unit standards. It has also linked theoretical claims discussed in the literature review with the real-life experiences of course designers.

Maxwell (1996:87) argues that validity should be regarded as a goal and not as a product of research. Validity in a qualitative research context cannot be easily established (Ibid) and should be evaluated according to the specific research criteria and not according to external, context-independent definitions of 'validity' (1996:87),

This research has attempted to ensure continuity between the research objectives, questions, literature review and data collection and analysis. Validity in this respect concerns the extent to which there is continuity within this research report. Furthermore, drawing on abduction theory as an analytical platform, legitimises and acknowledges the role that individuals play in engaging with national education policies, like the introduction of unit standards into the corporate workplace.

### 2.9.1 Threats to Validity

According to Maxwell (1996:88) the qualitative researcher needs to continuously deal with threats to validity. This requires the researcher to take explicit steps to recognise and deal with validity threats throughout the stages of the research.

One of the threats to validity concerns the interpretation and reporting of the data from the interviews. This constitutes a threat to the description of the data (1996:89) and is overcome by recording and transcribing the interviews. A recording and transcription cannot always replace the experience of being at the interview or participating in the interview, therefore it is also important for other relevant information to be shared about the tone or expression of the interviewees or any emotions that arise for the interviewer during the period of the interview. This will be achieved by making field notes immediately after the interviews and by reporting noteworthy comments in the data analysis.

Maxwell also stresses that validity can be affected by the interpretation or 'framework of meaning' (Ibid) that the researcher can impose on the data. For this reason, it is crucial that the way the data is interpreted remains transparent and is justified by examples from the data and from recognised conceptual arguments.

## 2.10 Ethical Issues

In this chapter I mentioned that I had drifted towards a reciprocal interview approach where I would share information about myself with regards my work with unit standards with the interviewees (Lather, 1986).

There are no fixed boundaries around concepts of privacy and confidentiality as access depends on the status and research objectives of the interviewer in relation to the interviewee. In my situation, I was conducting research as a Wits master's student, yet it would have been unethical not to reveal that I have interests in the business world. Had I come from a university or SETA as an employed researcher, information regarding the interviewee's clients or actual course materials would have been available to me without raising any ethical dilemmas. Yet as a private consultant, if I had asked probing questions concerning their clients, or requested access to their materials, the request could be misconstrued as trying to promote my own business interests through 'doing research'.

Each participant received and signed a letter that invited them to the interview. Issues of informed consent (Cohen and Manion, 1994:349) were handled when reading, discussing and signing the letter. Issues of confidentiality were addressed in the letter and during the initial phase of the interview.

### 2.10.1 Confidentiality

All interviewees are represented as anonymous characters when discussed in this research report, interviewees have been given descriptive names that are used when quoting.

## 2.11 Conclusion

The objective of this chapter was not only to outline the methodology required to conduct the research, but also to discuss the reasons supporting the methodology. Every attempt has been made to address the threats to the validity of the methodology, as this is a recognised problem when conducting qualitative research.

The way that unit standards have been experienced in training and development contexts in the corporate environment has not been formally addressed. Through the use of abductive reasoning to interpret and explain the experiences of course writers when using unit standards, this research provides some analysis of how SAQA's policies concerning the introduction of unit standards in workplace contexts, has been received.

# 3 LITERATURE REVIEW

## 3.1 Introduction

This research report was initiated to investigate how course designers use and engage with unit standards during the process of designing courses for the workplace. Approaching this research from a theoretical perspective yielded a number of possible research pathways, which included investigating the use of unit standards from the perspective of assessment, compliance to criteria or SAQA's values, to name a few possible approaches. The research opportunities in this field are broad and for this reason this research report has elected to investigate unit standards from two perspectives only; the first explores what unit standards are and why they were introduced, and the second addresses unit standards from a knowledge perspective. The literature review is therefore organised into these two main sections in order to provide a theoretical context for interpreting the multiple case study discussed in the next chapter.

With the transformation in the delivery of educational qualifications through the NQF, knowledge has emerged as a contested area. Unit standards emphasise the demonstration of 'applied skill', resulting in a shift away from a focus on knowledge towards a focus on teaching and learning that values the demonstration of skill (Spady, 2008:1-2) while deemphasising the underpinning knowledge that informs the behaviour. This has resulted in a flattening out of knowledge domains and hierarchies, suggesting that the introduction of unit standards has resulted in a shift in the way knowledge is valued and perceived.

The literature selected for this review essentially addresses the many and varied concepts and concerns that have emerged since the introduction of unit standards in South Africa. Concerns about the delivery of knowledge, acquisition of knowledge and access to knowledge will remain persistent themes throughout this literature review. For this reason, pertinent literature on knowledge drawn primarily from the sociology of knowledge is introduced in order to argue the case for knowledge from the perspectives of experts in this field.

The literature in this chapter hopes to offer an alternative way of thinking about unit standards. The literature will show how political, social and economic factors significantly influenced the introduction of unit standards as a means to redress inequality, primarily a consequence of apartheid. By locating unit standards in a context, the literature will then show from an educational perspective that the introduction of unit standards has had a significant impact on the treatment and positioning of knowledge within organisational training and development. It is this relationship, between political, social and economic

values on the one hand and educational values on the other that influences the way knowledge is valued and represented in workplace-based training and qualifications.

## 3.2 Literature Review Overview

The principal objective of this literature review is to present literature that can help develop a theoretical response to understanding how course designers use and engage with unit standards in the process of course design.

The first part of the literature review examines the origins and influences behind the introduction of unit standards in South Africa. This section will give an overview of the international and local influences on the introduction of unit standards. Even though unit standards have international roots, primarily located in the competency-based models of Australia, New Zealand and Scotland, it is also the influence of apartheid on unit standards that requires discussion. Understanding these factors goes some way to understanding the internal logic of unit standards regarding the treatment of knowledge. SAQA's 'design down' approach to course design is introduced in this section to explain how SAQA responded to concerns raised about unit standards. Concerns about the treatment of knowledge will be addressed in this section, as well as arguments against unit standards by education experts.

The second part of this literature review introduces theories of knowledge drawn from the sociology of knowledge. The aim of this section is to discuss some of the ways that vocational knowledge is described. The main objective in this section of the literature review is to defend the role of knowledge in education, and to highlight concerns regarding unit standards from an educational perspective.

The chapter will conclude with a summary of the findings from the literature review.

## 3.3 Unit Standards – Creating a Context

### 3.3.1 Introduction

This section of the literature review will discuss various influences that have contributed to the emergence of unit standards in South Africa. It is an attempt to answer the first of the three minor research questions, namely, 'What are unit standards and why were they introduced into the NQF?'

Values and trends in education worldwide are subject to economic and political influences that drive educational reform, and South Africa is no different. There is a context to the introduction of unit standards in South Africa, a context partly embedded in the past, while

looking towards a future as a global economic player. It is a context located within an economic and national imperative to produce school and college leavers with sufficient skills to meet workplace demands, while urgently redressing apartheid's legacy - social injustice and inequality.

Not only does quality education provide economic benefits, it also has social currency conferring status and a sense of self-worth on its recipients. In this respect the quantity and quality of school leavers and graduates are vital not only to the smooth running of an economy, but also serve a greater social good by providing citizens with the means to live productive and meaningful lives. Concerns with education, especially from an economic perspective, lie at the heart of international competency-based education and training (Wolf, 1994:xii), which has had a significant influence on education in South Africa.

The international influences mentioned in this research report include the combined influence of neo-liberalism and globalisation (Allais, 2007), which have shaped the perception that education, to have value, should serve the needs of the economy. This perception influenced the emergence of competency-based education with its heavy emphasis on vocational and skills-based training (Wolf, 1994:xii).

The literature review will begin by introducing unit standards and will provide some information on their origins and their intended function. The literature will explain why unit standards were problematic to providers and will introduce the concept of 'design down' course development, a method introduced by SAQA to help practitioners access unit standards when involved in course design. The way that unit standards view knowledge is addressed and then the review examines the international and local influences on unit standards. The section concludes by introducing literature that provides arguments against unit standards.

### 3.3.2 What are Unit Standards?

Unit standards emerged in the 1990s as part of broad-based educational transformation in South Africa. Their deep origins are obscure, with little written formally about how unit standards were conceptualised, by whom and in what forums. Allais (2007) makes reference to key individuals (Ibid:229), who played a significant role in the early formulation of the NQF, but the SAQA website makes little mention of the origins of unit standards nor provides the names of specific individuals involved in their introduction onto the NQF. Jansen (1998:2) argues that OBE has deep historical roots in behaviourism, and contemporary roots in the competency systems of New Zealand, Scotland and Australia.

Even though these early influences are obscure, there is still sufficient information about unit standards to sketch a picture of the factors that motivated for their introduction.

They were formally introduced through the SAQA Act of 1995. Unit standards are documents that provide statements of educational and training outcomes and assessment criteria for a qualification or part-qualification (Nkomo, 2000:4). They are expected to communicate the education and training outcomes, the assessment criteria and all the administrative requirements necessary for achieving competency (Isaacs, 2008:8). The notion is that, essentially, unit standards could be written for vocational, academic and non-vocational or non-academic areas. Unit standards are intended to be accessible to learners, course developers and assessors. They are expected to be written in such a way that they are understood by all stakeholders in the process. This research only examines the perceptions of course designers who are expected to use these documents during the course design process.

One of the main functions of unit standards is to provide the outcomes that direct achievements in all learning areas. The SAQA website provides a definition of 'an outcome', being defined as a 'contextually demonstrated end product of the learning process' (Glossary of terms, SAQA website, www.saqa.org.za, 2008). Each unit standard consists of a set number of credits and is regarded as a part-qualification. Unit standards focus on what can be observed in a practice, and each observable facet of the practice is expressed in procedural form as a separate outcome (Gamble, 2004:14). When combined with other unit standards from a similar learning area, the combined credits can eventually lead to a qualification (SAQA, 2005:5).

Unit standards have been written for formal, traditional vocations like carpentry or welding, but they have also been designed for office functions that have previously not been ascribed any form of qualification. This could include time management workshops, management skills and telephone skills to name only a few alternatives. None of these courses have any traditional link to formal qualifications, yet under the NQF, courses like these have been ascribed credits and can contribute towards a qualification.

## 3.4 Outcomes Based Education (OBE) and the Treatment of Knowledge.

OBE was introduced as the primary educational mechanism to redress educational inequality and to reposition South Africa as a global competitor through educational transformation (SAQA, NQF Overview. www.saqa.org.za).

What is significant about OBE is the emphasis placed on the relationship between the learner and the subject content. In traditional education systems, the content or knowledge is placed central to the learning process, but in OBE, the emphasis is placed on the learner and on what they can do. This means that the learner is expected to produce evidence of learning (outcomes) and based on this evidence, the learner is deemed 'competent' or 'not

yet competent'. There is a heavy emphasis on assessment and on adherence to unit standards, with less emphasis placed on *how* the learning occurs.

One of the founding values of OBE is that every context can become a site of learning, meaning that the lines between formal and informal learning become blurred within this system (Allais, 2007:167). Knowledge and curriculum are not placed in the foreground of education instead there is a shift towards the assessment of outcomes (Allais, 2007:103).

Knowledge in OBE is considered necessary only to the extent that it can increase the level of skill of the workforce or potential workforce (Allais, 2007:103). It has to have application to an immediate context. As one of the criticisms of traditional education is that it does not prepare the learner for the world of work, it follows that unit standards are designed to emphasise 'skill' and 'competence'. Knowledge, under OBE, is treated as a means to supplement the more important goal of 'learning how to learn' and learning problem solving skills (Allais, 2007, 104.).

The NQF and the assessment approach in unit standards follow international trends that emphasise the concept of knowledge-through-action (SAQA - NQF overview, SAQA website). This approach stresses the importance of application of knowledge and not the acquisition of knowledge. This trend forms one of the core values of OBE and is reflected in the writing and design of unit standards.

OBE draws a clear distinction between underpinning knowledge that needs to be acquired theoretically and behavioural demonstrations that suggest that the learner is able to meet the requirements of the outcome. Applied knowledge is the integration of knowledge, skill, attitude and application demonstrated by the learner in a way that 'suits the learning context' (SAQA, 2005:8). It is the 'applied knowledge' that is valued.

Unique to the representation of knowledge in OBE and in the writing up of unit standards is the attitude that skills can be broken down into separate processes, described as 'competencies' and then placed on the NQF as a unit of a qualification or part qualification (Wheelahan, 2005:5). Once skills are broken down and re-described as outcome statements in a unit standard, it is assumed that competency can be demonstrated for that outcome alone. What OBE is not concerned with, is the relationship *between* the outcomes (Wheelahan, 2005:5).

OBE has been presented as an educational approach that should be adopted for all types of learning, across the board, from early childhood education to higher education and vocational education. South Africa is the first country to attempt to apply one educational system to academic and non-academic fields alike when the NQF was initially introduced.

In South Africa unit standards are regarded by SAQA as instruments of educational reform, a necessary system to extend access to education to all South Africans

### 3.4.1 'Design Down' and Unit Standards

After unit standards were introduced, SAQA recognised that education providers were uncertain about how to approach course design within an OBE framework (SAQA, 2005:1). Manuals were developed by SAQA to help providers negotiate the process of interpreting unit standards and their outcomes into workable training programmes[1]. These manuals were necessary because of the confusion surrounding the interpretation of unit standards and the uncertainty about how to translate them into workable courses. These manuals recommend a 'design down' approach to course design, an approach that has set the tone for unit standards based course design (Allais, 2006:25). The 'design down' approach begins with the unit standard's outcome statements that specify the outcomes necessary for completing the unit standard. Underpinning knowledge is necessary only to the extent that the conditions required by the outcome statements are met. Knowledge, within an OBE context, needs to serve the outcome statements, thereby overlooking the natural logic of the knowledge area in question (Ibid). The treatment of knowledge will be examined in the second part of the literature review.

Unit standards do not define the nature of the content in a course, as the emphasis is on the 'measurable outcome' and therefore different institutions can produce different courses depending on their values or context (Jansen, 1998:28), provided they can demonstrate that the 'outcome' has been met.

Starting with unit standards and applying a 'design down' approach has not escaped criticism. This is because education providers prefer to focus on underpinning knowledge necessary in a course (Umalusi, 2007:39), but are now expected to begin course design using outcomes that challenge the shape and trajectory of teaching and learning (ibid).

The 'design down' approach to course design, emphasises the 'contextual' and the 'demonstrable' facets of course design and delivery, emphasizing observable and functional workplace practices (Gamble, 2004:14). Essentially, the objective of the design down approach to course design is to ensure that learners have an opportunity to acquire the outcome (SAQA, 2005:4). The acquisition of the outcome is valued above the knowledge, or formal knowledge component, necessary to acquire the outcome resulting in a shift in focus away from underpinning knowledge that informs practice towards a course design methodology that focuses on the acquisition of outcomes (Gamble, 2004;14).

The focus in this approach to teaching and learning, remains outcomes-focused, and in doing so, assumes that by demonstrating competency in an outcome, the learner is therefore competent in that particular learning area. Jansen (1998), Gamble (2004) and

[1] For example SAQA's 'Developing Learning Programmes for NQF registered qualifications and Unit Standards' (2005).

Allais (2006) argue against the value of unit standards and any outcomes-based approach. They argue that unit standards fragment knowledge (Gamble, 2004), are 'cumbersome' (Allais, 2006:281) and represent political not educational objectives (Jansen, 1998:2).

The design down approach was introduced by SAQA to help provide direction for course designers (SAQA, 2005:1). Yet the problems course writers encountered with unit standards persist. Far from being an accessible mechanism to develop skills across communities in South Africa, unit standards instead require extensive mediation regarding their interpretation, assessment and execution (Allais, 2006:282).

The design down approach to unit standards-based course design was introduced by SAQA to alleviate the confusion and uncertainty surrounding the introduction of unit standards. However there are other educational concerns with unit standards and one of these involves the status and treatment of knowledge. The next section will address this concern.

### 3.4.2 Unit Standards and the Treatment of Knowledge

Unit standards state the required outcomes necessary for competency in a qualification or part-qualification (SAQA-NQF Overview), but do not describe the way that the material needs to be taught or what knowledge content needs to be transmitted or acquired in order for the learner to acquire the outcome. This is because they follow international developments that emphasise the concept of knowledge-through-action (Ibid). This approach stresses the importance of the application of knowledge and not the acquisition of knowledge. The treatment of knowledge in unit standards based contexts is symbolised by three significant characteristics:

1. **Crossing of Disciplinary Boundaries.** Unit standards allow for the crossing of disciplinary boundaries (Young, 2003:558) in the sense that learners can access different theoretical and non-theoretical resources when meeting the outcomes of the unit standard. This differs from traditional qualifications that emphasised differences between disciplines, where qualifications symbolised and implied a specific culture of learning and knowledge acquisition in a particular discipline (Young, 2005:27).
2. **Emphasis on Applied Knowledge.** Unit standards value applied knowledge. Applied knowledge is the integration of knowledge, skill, attitude and application demonstrated by the learner in a way that 'suits the learning context' (SAQA, 2005:8).
3. **Inclusion of Non-Specialists.** Non-specialists (in education) are involved in the designing of the unit standards (ibid), resulting in unit standards that focus on a

sequence of outcomes that assumes through its design that learning will occur if the outcomes are met.

The education-based concerns of this literature review examine how unit standards represent the relationship between outcomes and content. This is an important area of concern for theorists like Allais (2007) because unit standards do not specify the specific content necessary to meet outcomes. Therefore almost any content can be selected provided it can be shown to meet the outcome (Allais, 2007:139). This approach has far-reaching educational repercussions, as teaching and learning have a new starting point – the outcome – and not the knowledge (content) domain. Unit standards shift the focus away from valuing knowledge for its contribution towards an approach where knowledge is valued only to the extent that it assists in meeting the requirements of the unit standard (Ibid: 166).

Furthermore, Gamble argues that unit standards emphasise 'applied knowledge' and disregard the formal knowledge component within a practice. They only acknowledge the need for formal knowledge where it serves the requirements of the outcome (Ibid: 14). Implicit in the 'applied-knowledge' value of unit standards is an assumption that all knowledge can be made explicit, and that all knowledge can be observed and measured (Gamble, 2004:15) while diminishing the tacit or incidental aspects of learning a practice (Ibid). Of concern for Gamble, is that not all knowledge or practices can be expressed explicitly, and the unit standard format does not recognise the role of the tacit in learning and in the acquisition of specialised knowledge (Ibid).

Unit standards outcomes set new criteria for *who* decided on *what* should be taught and *how* it should be assessed. Essentially, with the creation of SAQA, the NQF and unit standards, the treatment of knowledge was politicised (Lugg, 2009:49). The consequence of this new educational thrust results in teaching and assessment practices that are highly atomistic in nature (Walters and Daniels, 2009:69-70). They are described as atomistic because teaching from a knowledge base is replaced by teaching to meet the outcomes of the unit standards (Walters and Daniels, 2009:68). In summary, the introduction of unit standards has shifted the focus of education away from specialised knowledge towards a focus on assessing teaching and learning that crosses disciplinary boundaries, emphasises applied knowledge and includes non-specialists in the design and execution of unit standards and the courses based on these documents.

The international influences behind the introduction of unit standards will be discussed in the next section and should shed light on why the characteristics specific to unit standards were adopted.

### 3.4.3 International Influences on the Introduction of Unit Standards

The influence of neo-liberalism and globalisation on trends in education is one of the key factors that have influenced the emergence of the NQF and influenced the design and objectives of unit standards (Allais, 2007), competency based education (Wolf, 1994) and the transformation in further education and training (FET) in South Africa (Young and Gamble, 2008:1).

This section will begin by briefly interlinking the emergence of unit standards to the influence of neo-liberalism and globalisation. These two trends have significantly shifted perceptions on the role of government and private capital in the management of education in national economies, and their subsequent influence on the emergence of new competency based systems. The impact of neo-liberalism and globalisation on unit standards will also be discussed in this section.

#### 3.4.3.1 The Influence of Neo-liberalism and Globalisation

**Neo-liberalism**

Worldwide the trend towards decentralising state service delivery in order for private enterprise to supply services, has not escaped education provision. Allais (2007) argues that the movement towards privatising education and the placing of educational resources into private or community hands was influenced by neo-liberal values and has had a significant influence on the values behind the creation of the NQF and unit standards.

Neo-liberal values argue in favour of reduced state control of services and for an increase in the privatisation of goods and services (Allais, 2007:iii). Under these conditions state 'control' is limited to ensuring that the market remains accessible for the distribution of goods and services (Ibid:76). Within this neo-liberal value system, education, especially at organisational level, was placed in a similar category to other commodities and resources, namely a tradable commodity, packaged and delivered in some circumstances, as unit standards-based qualifications or part-qualifications.

The influence of neo-liberalism resulting in the decentralisation of education provision has led to private companies and industries in general emerging as providers of formal educational services by providing unit standards-based qualifications. With the introduction of SAQA and the creation of the NQF these companies were now expected to become accredited providers of unit standards based qualifications. This has transformed them from providers of in-house training and development, to providers of accredited qualifications or part-qualifications (single unit standards).

**Globalisation**

Globalisation has also had a significant influence on the shaping of values in education, and has contributed to the language, wording and ethos of unit standards. Castells (Muller, Cloete, Badat, 2001:1-4) argues that 'globalisation' is a descriptive term that does not describe anything in particular, but refers to the changes and challenges facing society and economies, particularly with regards to the provision of labour, technological advancement and the ability to react to shifts in economic transformation. How to shape education in the face of globalisation remains a pressing concern for governments around the world (Allais, 2007: 90), and the creation of the NQF and the emergence of unit standards, is interlinked with this trend.

Globalisation has had a particular influence on the way that knowledge is perceived and valued, specifically with regards to commodification and the emergence of the 'knowledge economy', which engages with how knowledge is treated and dispensed (Ibid:81). Knowledge within this context is treated as a commodity, much like any other, to be packaged, bartered and exchanged. A shift in the organisation of knowledge has occurred from valuing 'information and facts' in favour of valuing knowledge that is expressed as 'skills' (Ibid).

The emergence of globalisation has resulted in a shift in attitude towards knowledge, where qualifications are 'packaged' and 'dispensed' like any commodity or object that has a transaction value. The perceived market value of a qualification is rated higher than access to theoretical knowledge that does not directly apply to a particular job specification. Competency-based assessment emerged on the backbone of neo-liberalism and globalisation, resulting in a change in attitude towards qualification that valued work-ready skills above traditional education.

Unit standards, supported on the NQF, were partially influenced by concerns about globalisation, as these documents do not prescribe content necessary for a qualification, but instead describe outcomes and qualifications that can be adapted according to the requirements of different contexts and situations (Young and Gamble, 2008:3). In this respect, a shift has occurred away from teaching and learning that emphasises underpinning knowledge, towards an approach that emphasises specific skills or outcomes that are designed and packaged to meet perceived economic or business requirements. Knowledge in this respect is regarded as a commodity that is valued and expressed as a qualification or a set of definable skills.

This short section on neo-liberalism and globalisation, argues that unit standards were influenced by international economic trends that have shaped values concerning how education and knowledge is perceived within societies influenced by neo-liberalism and globalisation.

The joint influences of neo-liberalism and globalisation have had a significant influence on the emergence world wide of competency-based education.

The origins of competency-based education and how it connects to unit standards, will be briefly discussed in the next two sections.

#### 3.4.3.2 Competency-based Education

Unit standards are influenced by international competency-based models of vocational education and training (Jansen, 1998:1). This section will introduce competency-based education and conclude with a discussion concerning the differences between competency and outcomes.

Alison Wolf (1994) in her book 'Competence-based Assessment', provides a source for the origins of competency-based education. Wolf (1994) traces the emergence of competence-based assessment to the 1960s and 70s in the United States. It was introduced in response to arguments from business that school and university graduates were unprepared for the workplace because the education provided did not meet the skills necessary for the workplace. It is the emphasis on applied skills and workplace functions that has helped catapult competency-based education to the forefront of progressive education.

Competency-based education also has deep roots in the UK where it has primarily been used in vocational and professional contexts (Ibid: 31). Australia introduced competency-based education in the 1990s (Griffin et al, 2007:19). Most countries use economic arguments to back the introduction of competency-based systems, arguing that this approach will make the nation's workforce more competitive in the global market (Young and Gamble, 2006:1).

In this respect, the introduction of competency-based assessment was essentially an educational response to the economic requirements of big business, where standardised qualifications were demanded, practical experience valued and education focused primarily on delivering skills that met job descriptions (Wolf, 1994:32-34). This era marks the emergence of an attitude towards education that commodifies knowledge and qualifications (Wolf, Ibid:xii). As a result education is valued according to its perceived market value, and the extent to which it can secure a position in the job market.

A competency model of education emerged that emphasised non-academic, performance-based education; a model that favoured the demonstration of skills above theoretical knowledge and theory-based assessments, as a means to acquire a qualification. This trend influenced the emergence of a new kind of qualification, one that focused on work-related outcomes (Ibid:37).

Competency-based education and assessment is defined by Wolf (Ibid:1-2) as

- being derived from a set of transparent and clearly written outcomes,
- having outcomes and assessments that can be interpreted by all users, and
- having assessment that is designed separately from the educational content.

The trend in competency-based education is to shift the emphasis away from a set syllabus towards an emphasis on assessment, focusing on the capacity of individuals to demonstrate an outcome or competency as an indicator of ability (Ibid:32). Furthermore, the competency model separates the design of a qualification from the delivery of the qualification. Not only has the introduction of competency models shifted curriculum design away from a knowledge focus, but it has also resulted in education providers designing courses based on competencies that emphasise applied skills.

Competency tends to encapsulate performance-based objectives, generally associated with vocational and professional working contexts (Wolf, 1994: 31). The wording of competency documents is assessment driven and usually made up of a set of specified outcomes that require demonstration in order to acquire a qualification or competency in a particular area. They tend to operationalise workplace practice and assume a functional definition of competency (Ibid).

Both South African 'outcomes' and UK 'competencies' share similar values, namely they are outcome focused, value transparency and the separation of assessment from institutions (Ibid:2). They share similar values regarding the rationale for introducing them in workplace contexts, namely to overhaul the vocational education programmes and to produce graduates that have skills suitable for the workplace. Competencies and unit standards are typified by a distinctive 'non-academic' tone (Ibid:3), with the emphasis placed on skills necessary for a particular context, and it is this that acts as the starting point for both competency-based education and OBE.

What sets South Africa apart from other countries concerns the scope of educational reform covered by the NQF, which extends into almost every educational context in South Africa (Allais, 2007:55 Young, 2008:122). Outcomes-based Education (OBE) was introduced as the primary educational mechanism to redress educational inequality resulting from apartheid discrimination (SAQA, NQF Overview. www.saqa.org.za, 2008). The intention was to implement a system similar to competency-based education in order to urgently address educational concerns and to reposition South Africa as a global competitor through educational transformation (Ibid).

Creating an education framework that could launch South Africans as global competitors is just an aspect of the factors that influenced the design of the NQF. Of particular significance is the attempt to use the NQF as a mechanism of social transformation, as a means to

amend past inequality and redress social injustice (Parker and Harley, 2007:17). This value particularly differentiates South Africa from similar systems worldwide (Ibid) and is evident in the kinds of qualifications offered on the NQF. What is truly unique about the South African system is the attempt to implement unit standards-based qualifications across the board and in areas that have no historical qualifications culture, like office work, analysing characteristics of burial societies (Allais, 2006: 285), self-management linked to self esteem (ibid) or budgeting for households (idid), to name just some of the many examples. In this respect South Africa is unique in that OBE has been implemented in many non-vocational contexts and in contexts that have not previously been qualification-driven like the introduction of learnerships in the financial services industry. Another objective was to raise the status of vocational education (Umalusi, 2006:19).

In summary, the arguments in favour of competency-based education have economic and work-based roots, as organisations require employees competent in workplace functions. In the UK and Australia competencies apply primarily to vocational contexts, while South African unit standards have been introduced across vocations, disciplines and into workplace practices that formally had no qualifications or formal recognition. The reason these kinds of non-traditional qualifications were introduced has its history embedded in South Africa's apartheid past, where so many people were excluded from access to formal education. These and other factors will be addressed in the next section which looks at the unique circumstances in South Africa which have influenced the tone and trajectory of the NQF, and of unit standards.

### 3.4.4 South African Influences on the Introduction of Unit Standards

Post-Apartheid South Africa needed urgently to reform the education system, and through negotiation, discussion and the investigation of alternative education systems, established the South African Qualifications Authority (SAQA) in 1995 - jointly administered by the Ministers of Education and Labour. SAQA was created with the explicit aim of shaping and overseeing the NQF (King, 1999). The objective of the NQF was to situate all qualifications on one of the levels on the NQF (SAQA, NQF overview, 2008).

Unit standards were established through the creation of SAQA and the NQF, and in many respects are the foot soldiers that on a daily basis are expected to express the ideals of the NQF while simultaneously shaping the trajectory of teaching and learning in South Africa. These values and ideals that have shaped the introduction of unit standards, have deep historical roots, embedded in the experience and memories of South Africa's apartheid past.

This section will discuss these influences and explain how apartheid in particular, has defined and shaped the introduction of unit standards as a means to redress inequality in education and to promote social transformation and upliftment.

#### 3.4.4.1 The Influence of Apartheid on the NQF

The impact of apartheid on the collective perception and experience of formal education makes the South African implementation of the NQF unique worldwide(Young, 2008, 187). Apartheid's legislated racism had a direct impact on who had access to formal education, and who was excluded (SAQA NQF Overview. www.saqa.ac.za, accessed 2008). Therefore SAQA, in developing its model for the NQF, was acutely aware of how apartheid inequality privileged some institutions above others and offered some individuals better educational opportunity based on racial lines (Ibid).

SAQA stresses that there is a 'historical imperative' to focus on what learners can do and not focus on where learners studied or obtained a qualification (Ibid). This is in response to the exclusion of so many South Africans from formal qualifications because of their race, while expecting these same individuals to work in a limited vocational capacity (like assistants to artisans) without enjoying the financial rewards or status awarded to someone with formal qualifications (Young, 2008:187). The knowledge and skills that an individual acquired through work exposure and experience were historically placed secondary to formal, institutionally-based qualifications (DoI/DoE, 2002:77). Because apartheid laws prevented the majority of South Africans from entering formal, racially exclusive education, labour depended on the informal acquisition of knowledge and skills obtained on-the-job (Allais, 2007:31).

This is one of the arguments used by SAQA to support the introduction of evidence-based practices like OBE across all NQF levels including in-house corporate education and training. This theme resonates continually throughout all unit standards documents that the learner needs to be assessed on what they can do, not on how they acquired the knowledge or on where they studied. The implications of repositioning of knowledge into the background of education practices will be addressed in the section that discusses the arguments against unit standards.

In summary, the experience of apartheid has had a profound influence on the shaping of education in a post-apartheid South Africa. With regards to education, it is especially noticeable in the values concerning the acquisition of skills, as the emphasis is placed on the capacity to perform a task and with less emphasis placed on the acquisition or assessment of the underpinning knowledge necessary for the task.

The influence of the labour movement will now be briefly discussed to further frame the values that shape the introduction of unit standards.

#### 3.4.4.2 The Influence of the Labour Movement on Unit Standards

The extensive role of the labour movement in bringing an end to apartheid and in shaping a New South Africa cannot be adequately described in this short research report. The labour movement was one of the significant drivers in the transformation of education through the introduction of the NQF (DoL/DoE, 2002:35) by promoting an education system that valued access, mobility, portability and progression (Ibid:65) while redressing the wrongs of the past, and promoted the development of education in all sectors of the economy (Ibid).

Labour was caught in a double bind, namely that salaries would not increase without formal skills, but job reservation and apartheid inequality prevented the majority of labourers from accessing formal teaching institutions. A system of nationally recognised, portable training qualifications was proposed (Ibid). The labour movement was keen to adopt a standards-based, OBE education system that would recognise the ability of labourers to demonstrate their competence and lessen the emphasis on theoretical knowledge and formal learning (Allais, 2007:225). These values found their way into the NQF and shaped the design of unit standards.

#### 3.4.4.3 Short Summary

The international and local origins of unit standards were introduced and discussed in this section. The values that have influenced the introduction of unit standards into the NQF are diverse, incorporating neo-liberalism and globalisation and the South African imperative to urgently redress educational inequality as a consequence of apartheid. These combined to significantly influence the tone and trajectory of educational delivery in South Africa. However, the political objectives behind educational transformation have resulted in a particular set of values that are expected to shape educational practice in South Africa. This includes recognising what an individual 'can do' rather than focusing on how knowledge was acquired. There is a clear social imperative to make education accessible to all citizens, and this is reflected in the values that are expected to underscore OBE. The implications of this policy and the support for OBE and unit standards will be addressed in the next section, which introduces arguments against unit standards.

### 3.4.5 The Arguments against Unit Standards

This research report will go on to argue that political educational reform may not necessarily be equated with pedagogically sound decisions. Jansen (1998:4) argues that there is no evidence that transforming the curriculum will transform national economies for the better. This is because, he argues, the economic problems of developing nations are not significantly influenced by education, because political and economic policies have more

bearing on a country's prosperity (ibid). Other concerns with unit standards are raised in this section.

#### 3.4.5.1 Design and Interpretation Problems

Unit standards were designed to be transparent, accessible documents. However, research indicates that they are full of jargon (Allais, 2003: 309), complex, vague and subject to multiple interpretations (Berlach and O'Neill, 2008:50) and providers battle to understand how to use unit standards in course development (DoL/DoE, 2002:26).

Complaints from educators about unit standards mainly concern the complexity of the wording and language (Umalusi, 2007:39), resulting in the outcomes being open to interpretation and different providers producing materials of varying quality (Ibid:45). The lack of conceptual clarification in OBE and in the wording of outcomes in unit standards is a cause for concern. Conceptual clarification requires that all parties involved in working with unit standards have a shared understanding of what unit standards and OBE is and how it should be implemented (Berlach and O'Neill, 2008:50). Berlach and O'Neill argue that stakeholders in OBE lack a shared understanding of the model, and this leads to difficulties in implementation and the increase in specification of outcomes (Ibid). This suggests that unit standards cannot be used as a reliable quality assurance tool.

Evidence from the literature suggests that users of unit standards do not understand what they are, or how they are supposed to be used (Jansen, 1998:1). Even though unit standards were not intended to function as a curriculum guide, many providers use unit standards in that capacity, by writing materials sequentially that follow the unit standard format (Ibid). To overcome this problem, the SAQA website (accessed April 2009) provides access to their 'NQF toolkits' [2]and other support content aimed at helping course designers develop learning programmes using outcomes (SAQA, 2005). These handbooks specify that they have been produced to 'guide' the design process, and are not prescriptive. However, evidence from the literature suggests that in response to providers' lack of understanding, unit standards have become increasingly more prescriptive with 'layers of specifications' added to them (Allais, 2007:22). In response to this, the Departments of Labour (DoL) and Education (DoE) recommend that providers are given professional support (DoL/DoE, 2002:26).

#### 3.4.5.2 Problems Linking Unit Standards to Qualifications

One of the concerns raised by training providers regarding the implementation of unit standards-based qualifications, concerns uncertainty about linking unit standards to a qualification, and therefore compromising the quality of standards-driven education

[2] These 'toolkit' are courses distributed for a fee, and are marketed on the SAQA website.

(Berlach and O'Neill, 2008:50).). To compensate for quality concerns, the design of unit standards shifted from a framework to achieve qualifications, to acting as 'linguistic documents' that demand adherence to their structure and format at the expense of disciplinary goals (Allais, 2007:196). Compliance to unit standards formats has become an increasing problem for course designers as they battle to incorporate necessary knowledge with unit standard formats (Ibid). This is partially a consequence of the complex language used when writing unit standards; language that is not transparent, not accessible and increasing focused on the over-specification of unit standards (Berlach and O'Neill, 2008:50; Allais, 2007:22).

There are other problems with relating unit standards to qualifications. Jansen (1998:8) for example is concerned that outcomes fragment knowledge. He argues that it is very difficult to teach and assess[3] in an outcomes framework where each outcome is listed as a specific entity (Ibid). Also, he argues that the representation of outcomes as separate competencies is not connected to any recognised knowledge acquisition processes (Ibid).

In conclusion, many courses developed according to unit standards appear to unintentionally fragment the course content and do not support cohesive learning (Umalusi, 2007:41). Theorist like Wheelahan (2006a:15) argue that designing according to outcomes sacrifices theoretical or discipline knowledge in favour of context-dependent behavioural measures. Furthermore, courses designed using unit standards are expected to use outcomes that express tasks in language that is explicit, verbal and procedural, even when the nature of the task cannot best be expressed in language (Gamble, 2004:14).

#### 3.4.5.3 Concerns from a knowledge perspective

Young (in Wheelahan, 2007b:3) explains that teaching vocational knowledge requires a 'double recontextualisation' as disciplinary knowledge needs to be recontextualised into applied disciplinary knowledge for vocational programmes. Furthermore there needs to be a process of pedagogic recontextualisation that directs the course at the appropriate level for the students. Access to primary knowledge is necessary for the delivery of a well designed course (Ibid). Of concern is the implication of misinterpreting primary sources or

Assessment of Outcomes: Although this project is not addressing the issues and debates concerning assessment of unit standards-based courses or qualifications, it is nonetheless important to acknowledge some of the concerns regarding assessment. OBE focuses on teaching towards and assessing against outcomes, where an outcome can indicate a particular standard of performance demonstrated in a defined context. Therefore competent 'performance' in one context can differ from competent 'performance' in a different context or with a different assessor (Griffin et al, 2007:22). Of concern in situations like this is that the concept of 'competent' is not a static concept, and that as workloads shift and change so to does the concept of 'workplace competence'. Ironically, competency in a unit standard is meant to suggest that the candidate has met 'the standards of performance expected in the workplace' (Ibid) yet does not imply that the learner can perform should workplace conditions change. This is also because unit standards assess outcomes and not underpinning knowledge.

overlooking important content rendering the contents of a course questionable (Macdonald, Hunter, Tinning, 2007:115).

In traditional disciplines, knowledge production relied on the discipline's primary knowledge source, normally research universities or institutes, to produce the primary discourse (Ibid:115). This primary knowledge is recontextualised into a new discourse through the development of courses and teaching materials for other learning sites – like schools or FET colleges. Government departments or other agencies refer to the knowledge generated in primary discourse to develop programmes and policies(Ibid). The knowledge developed at the primary level is now taught at the third level of recontextualisation, through a process of reproduction of the discourse using materials developed in the second stage (Ibid). When primary knowledge is misinterpreted or overlooked, the knowledge delivered at the third level (reproduction of discourse) is questionable.

Wheelahan (2004:7) also argues that knowledge is complex, differentiated and cannot always be made explicit with all its components defined in outcome statements. Therefore, by using standards as a starting point for the design of qualifications, limitations are immediately imposed on content by including only that which can be expressed in outcomes-based language (Ibid). For Wheelahan, one of the core objectives of education should be to assist students in developing differentiated knowledge through engaging in different learning experiences (Ibid).

From a knowledge perspective, Wheelahan (2007a) also argues that Australian 'training packages' which are very similar to South African unit standards, exclude the users from the 'powerful knowledge' used to design those packages. Knowledge within an OBE context is rendered to a support function. In this situation, knowledge is perceived to only have value when promoting the acquisition of an outcome.

In conclusion, this section raised some of the arguments against using outcomes in developing curriculum and content. Many different kinds of problems were raised, including problems with interpreting unit standards, concerns with the fragmentation of knowledge, and questions about the nature of workplace knowledge. What is clear from the concerns raised in this section is that the interpretation and implementation of unit standards in curriculum design is complex and contested.

### 3.4.6 Section Summary

This section of the literature review began by introducing unit standards, what they were and why they were introduced into the NQF. The combined influences of international education trends in competency-based education and South African factors, contributed to the introduction of OBE and unit standards into the NQF. The section on South African

influences on the NQF highlights the roles of apartheid and the labour movement on its design. The influences of neo-liberalism and globalisation were presented as significant forces directing the emergence of competency-based education, which in turn directed the emergence and design of the NQF. The literature suggests that origins of unit standards are rooted in political and social objectives, yet literature drawn from educational sources highlights the theoretical and practical concerns regarding the implementation of unit standards and OBE. It is this conflict, between politics and economics on the one hand and the voice of education and pedagogy on the other that has rendered the introduction of unit standards on the NQF as contested terrain.

This section has primarily focused on the political and economic factors that have helped shape the NQF and unit standards. Selected theories of knowledge pertinent to unit standards are addressed in the next section. The objective of the next section is to introduce theories of knowledge that not only explain *why* foregrounding knowledge is critical in the course design process, but also to construct arguments, rooted in the sociology of knowledge, that explain why unit standards are problematic.

## 3.5 Theories of Knowledge

### 3.5.1 Introduction

The aim of this part of the literature review is to present arguments drawn from the sociology of knowledge that substantiate the importance of foregrounding knowledge in the course design process. One of this research report's research questions is concerned with an explanation about why unit standards are problematic when used as a starting point for course design. The theories of knowledge discussed in this section will go some way towards addressing this concern. Essentially, the aim of this section is to provide a theoretical explanation for why unit standards seem to be so difficult to work with. An overarching premise of this research report is that underpinning knowledge is crucial for functioning within the workplace, and in turn, for designing course materials.

The viewpoints expressed here, argue that there is a structure to knowledge, and that it requires distinct conditions for its transmission. This literature is necessary for building an argument that suggests that unit standards may meet the social and political objectives of the NQF, but fail when examined through an educational lens.

The claims made in this section will argue that leading theories of knowledge suggest that knowledge is structured, that knowledge areas have their own internal structure and the acquisition of knowledge is a systematic, guided engagement with the knowledge area in question (Moore, 2004:156). In his introduction to 'Education and Society' Moore (2004)

raises an important issue, namely that one of the problems facing the sociology of education is that the discipline lacks a defined theory of knowledge (Moore, 2004:156, Muller, 2006:14; Young, 2003:556). In the absence of any defining theory, constructing arguments that favour or criticise educational practice regarding curriculum planning, assessment or research from a knowledge perspective becomes problematic (Muller, 2006:14, Young, 2003:556) as there is little agreement on how knowledge should be organised or what knowledge needs to be included in a course.

The aim of this part of the literature review is to introduce theoretical arguments that can substantiate concerns about the use of unit standards as a means to structure knowledge.

This section will begin by introducing five different knowledge categories that show how knowledge can be categorised according to how it is used or acquired. These categories provide a mechanism to identify the different roles that knowledge plays within a work context. The remainder of this chapter will focus on the social organisation of knowledge, arguing that knowledge acquisition is a social process and this can have implications on how knowledge is viewed, received and transmitted.

### 3.5.2 Knowledge Categories

Young (Umalusi workshop, 2006, unpublished presentation) identifies categories for defining vocational knowledge. These categories are defined according to the complexity of knowledge required to meet workplace functions.

One of the main differentiators between the knowledge categories concerns the processes required to acquire the necessary knowledge and the level of complexity involved in acquiring or applying the knowledge.

This section of the literature argues that there are differences in the quantity and quality of knowledge necessary to function in a job, yet all knowledge acquisition is to some extent complex.

The categories described by Young are:

- **Operational** – this applies to knowledge that is necessary when performing general activities. It can also be referred to as 'functioning knowledge' (Biggs, 1999:42). This kind of knowledge requires other kinds of knowledge in order to be utilised – like declarative knowledge (knowing about something or knowing that…). Operational knowledge can appear simplistic, like having the necessary knowledge for answering phones, operating switches or sweeping floors. Or it can be more complex, like working equipment or operating a dentist's drill. In all cases, operational knowledge is usually informed by some other kind of knowledge, normally declarative

knowledge. Even though performing operational activities may appear on the surface to be simple, it is the variation in the complexity of underpinning knowledge that determines the skill levels necessary to inform operational or functional practice.

- **Procedural** – this is workplace knowledge which is a form of codified knowledge, it concerns 'knowing how' to do something. It is functioning knowledge that lacks a conceptual foundation (Ibid). Educating towards procedural knowledge limits learning by providing access to functions or procedures without providing access to the underpinning theories and concepts that inform the practice (Wheelahan, 2004:6). Some unit standards are designed with outcomes that do not support any particular learning framework, and therefore lack any supporting or underpinning knowledge. This is because this kind of knowledge is generally acquired through the workplace, and is linked to workplace contexts and not to a discipline or theoretical practice. This type of procedural knowledge is different to the knowledge concerns raised by Wheelahan, because courses that provide procedural knowledge only, are generally embedded in a discipline, but obscure the underpinning knowledge.
- **Craft and Vocational Knowledge** – this was the traditional basis of workplace occupations traditionally taught through a master/apprentice relationship, and will not be discussed in much detail in this research report. [4]
- **Disciplinary and Professional Knowledge** – this is the basis of general and higher education. Disciplinary education is not directly applicable to the work context, as it requires knowledge that is conceptual, declarative and abstract (Biggs, 1999:42). Acquisition of disciplinary knowledge requires the ability to label, differentiate, elaborate and justify (Ibid). The knowledge gained through disciplinary courses underpins professional practice, which is functional, specific and pragmatic (Ibid) and requires the application and execution of knowledge (Ibid).

Wheelahan (Ibid) and Biggs (1999) suggest a further category – **declarative knowledge** – which is described as 'knowing that' or 'knowing about' something specific. This is knowledge acquired through accessing the codified knowledge of texts and theories (Wheelahan, 2004:6). On its own this kind of knowledge can limit the knower to the realm of theory only, and therefore access to other knowledge forms is necessary in order for this knowledge to find expression.

[4] In South Africa the traditional apprenticeship system used to transmit vocational practice has been replaced by unit standard based qualifications. The implications of transforming the teaching of traditional craft and vocational occupations through OBE has been examined extensively by Gamble (2004) in her doctoral thesis. This project draws on some of Gamble's work regarding the transmission and organisation of knowledge.

Questions concerning the nature of knowledge, specifically its role in organisational development emerge from business schools and universities worldwide. This immense field, primarily addresses the nature and production of knowledge within organisations. One approach to defining knowledge within the organisation addresses knowledge from two perspectives. The first attempts to categories organisational knowledge. The second addresses issues of knowledge transmission.

This wide field can encompass many paths and perspectives, and for the purposes of this research report, organisational knowledge focuses on addressing the complexity of necessary knowledge and its transmission. One approach to organisational knowledge is to differentiate between complex knowledge, information and data (Tsoukis, 2005:8).

Complex knowledge is viewed as the most 'complex' of the three categories. Knowledge within an organisational context requires the knower to integrate theoretical or disciplinary knowledge with a substantial measure of judgements, values and beliefs acquired through business practice (Ibid:121). This kind of knowledge is similar to declarative knowledge, essentially knowledge that can inform decision making and workplace practice.

Information as knowledge concerns contextually-based items that have value and meaning within that context. Furthermore, information as knowledge suggests explicit relationships between items (Ibid). In this respect, it is the access to and the understanding of information that allow for individuals to participate fully within organisational practice.

Knowledge as data concerns information expressed as a set of items or events that appear in a particular sequence (Ibid). It is essentially concert, measurable data that adds to knowledge as information and informs complex knowledge.

The transmission of knowledge between individuals and groups is essentially a consequence of social learning, an important topic addressed in the next section. Essentially, organisational knowledge lies within individuals, not in policies, procedures or information, and is therefore reliant on social interaction for its transmission (Ibid:8).

In conclusion, this short discussion concerning organisational knowledge cannot do justice to this ever-growing field of interest. It is inserted into the literature review to further highlight the complexities involved in teaching and learning within organisations. Furthermore, this section argued that even though knowledge can be categorised, the levels of complexity involved in its acquisition cannot be underestimated. The knowledge categories selected for this review appear on the surface to be arranged from 'simple' to 'complex', and therefore it is understandable that assumptions are made about the ease of acquiring operational or procedural knowledge compared to craft, vocational or disciplinary or organisational knowledge. It is important to note that all operational or procedural

knowledge requires some kind of underpinning or declarative knowledge that informs the activity.

The next section in this chapter will look at learning theories that address knowledge specifically in relation to work or vocational contexts. The aim of this section is to present alternative ways of conceptualising workplace knowledge. The theories raised in this section argue from an educational perspective the importance of transmission and representation of knowledge within workplace contexts.

### 3.5.3 The Treatment of Knowledge in Vocational Contexts.

Since the introduction of competency-based education, the constant debate in vocational teaching over the last three decades concerns the status of knowledge in education (Wheelahan, 2007a:10). On the surface it appears to be an absurd debate, questioning the centrality of knowledge in education, but even this short literature review has provided arguments from political, social and economic contexts that indicate that the role of knowledge in education is highly contested.

Neo-liberalism, globalisation and the influence of post-modernism have placed the centrality of knowledge on uneven ground. In South Africa an additional layer of complexity exists because education (and therefore knowledge) was accessed along racial lines during apartheid. This resulted in the majority of South Africans being excluded from formal education, and consequently reinforcing arguments rooted in the trade union movement, that favoured the teaching and learning of applied skills above structured theory-dense educational pathways.

Recent trends in the sociology of education suggest a shift towards recognising that knowledge is systematically structured and that teaching and learning must focus on knowledge. These values are noted in the work of Allais (2007), Gamble (2004) and Young (2008), to name just a few.

This section will draw on social learning theory to highlight the importance of underpinning knowledge and to recognise that knowledge has structure and requires distinct conditions for its transmission within a social context.

#### 3.5.3.1 Social Learning and Communities of Practice (COP)

Although the work of Etienne Wenger (1998) does not focus on knowledge but rather on social learning emerging through communities of practice (COP), he is concerned with how people learn within a workplace context, hence the relevance of his work for this study. Learning, according to Wenger occurs as a consequence of social participation.

The key to learning and knowledge acquisition within a social context is shaped by engaging with workplace practice which leads to a sense of meaning, as a consequence of engaging with people and with the practice (Wenger, 1998:52-53). For Wenger, the site of learning is the community of practice (COP), which is the social context where employees engage with each other and the work at hand. It is within this context that individual and groups engage with the COP both actively and passively, to learn and refine workplace practice. The process of engaging in a COP shapes the practice and the identities of the individual members, both as individuals and as members of the group (Wenger, 1998:4).

Wenger describes the experience of learning from skilled agents as 'legitimate peripheral participation' (Gamble, 2004:5) suggesting that the 'beginner' engages in a COP with an expert, and through this social relationship acquires the practice over time.

Furthermore, learning is regarded as an ongoing process that involves the individual engaging with the COP, leading ultimately to a proficient workplace-based practitioner. 'Knowledge' cannot be acquired away from practice, and it is through the act of engaging with the COP that a person is able to 'learn' and in doing so, contributes to the COP.

Learning within a community of practice involves learning through direct or peripheral participation, where knowledge is not defined as specific unit of information, but is instead acquired and used as part of the social process of an activity. It is a process that shapes experience, where workplace practice is 'absorbed' to create fully functional members of that practice (Wenger, 1998:88).

In summary, even though Wenger does not address the organisation of knowledge directly, social learning theory does recognise that knowledge emerges through engaging with workplace practice. The act of participation with the COP shapes identity and the meaning necessary to engage successfully in workplace practice.

#### 3.5.3.2 Reification

Reification is the process that shapes the meaning of practice within the workplace (Ibid: 58). Reified practice is ascribed intrinsic meaning by the user and takes on an identity of its own (ibid). Reified concepts within a COP would include conversations or actions that have specific meaning to the COP and would probably have little intrinsic meaning if discussed away from the COP or workplace.

Reification is particularly significant as it is the process through which meaning is attributed to practice. The ability to reify practice allows participants full access to the practice and the COP.

This research report has included concepts like the COP and reified practice to highlight the importance of meaning-making within everyday workplace practice. The essential focus of

Wenger's social learning theory is on practice acquired through engaging socially with other members of the community. Through engaging with practice, concepts are reified, ascribed personal meaning and contribute to the overall sense of belonging that an individual experiences within the workplace. Learning, within a social learning theory, is highly depended on engaging socially with experts and newcomers in a particular context.

### 3.5.4 Section Summary

This section of the literature review has focused on ways of addressing vocational knowledge. This section began by showing how knowledge could be categorised according to the kinds of knowledge required to meet workplace practice. This section emphasised that ultimately all knowledge acquisition is a complex process and even though the knowledge categories appeared to be organised from simple to complex, this is in fact deceptive. These categories highlight knowledge relevant to vocational practice. Similarly, Wenger's COP and social learning theory draws attention to the social role of knowledge acquisition. The theories discussed in this section indicate that knowledge acquisition and practice is an ongoing process situated within a social context.

In contrast, outcomes-led unit standards focus on observable criteria that represent a part or facet of a particular practice (Gamble, 2004:14). This approach to course design, one that emphasises 'knowledge-though-action (SAQA-NQF Overview) is distinctly different to Wheelahan's arguments about knowledge acquisition, Wenger's COP and theories of social learning. Even though unit standards assume that the demonstration of a practice suggests competency in that practice, it is a highly controversial assumption. The theories discussed in this section have consistently argued that knowledge acquisition is a complex on-going process (Gamble 2004:14; Wheelahan, 2004: 7), a process that cannot always be expressed in language, or as facets of a broader practice. Unit standards attempt to capture the behaviours of that practice but overlook the knowledge necessary to inform the practice. In this respect the importance of knowledge cannot be underestimated, and its centrality to educational planning requires urgent attention (Gamble, 2004:2).

## 3.6 Findings from the Literature Review

The aim of this section is to summarise the literature by identifying important themes and also to use these themes to create the basis of an analytical context for the next chapter on data analysis.

### 3.6.1 Politics and Economics at Loggerheads with Educational Theory.

The first finding concerns literature that clearly indicates that political objectives for education are not supported by educational theory. The set of assumptions that underscore unit standards are particularly influenced by the labour movement and perceptions of education that emerged as a consequence of apartheid. The emphasis is evident in values like 'applied skill' which focus attention on demonstrated skill and outcomes and in doing so, unintentionally fragment course content (Jansen, 1998:8) and do not support cohesive learning (Umalusi, 2007:41)

Knowledge in post-apartheid South Africa is contested terrain, where outcomes and outcomes-based qualifications point towards a different set of values and assumptions to those of educational theory discussed in this research report. The values of SAQA and of OBE are implied within every unit standard, as the outcomes mostly cross disciplinary boundaries (Young, 2003: 558), emphasise applied knowledge (SAQA, 2005:8) and include and value the opinions of non-specialists (Young, 2003:558)). These values are criticised from an educational perspective that argues that for effective learning to occur, knowledge needs to be structured (Allais, 2007:139).

### 3.6.2 Unit Standards - Essentially Inaccessible

The literature suggests that unit standards are essentially inaccessible documents that cannot easily be understood. Arguments against unit standards can come from many sources, and a consistent trend in arguments emerging from education suggests that curriculum and content and the way that knowledge is represented in unit standards are two key areas of concern. Because most educational reform is politically motivated, the pedagogic implications of education policy are often underestimated (Jansen, 1998:4).

The concerns raised by experts regarding access to unit standards contrbute to the findings in this literature review. Allais (Ibid) argues that OBE has shifted the focus away from teaching knowledge necessary to inform practice, towards meeting the outcomes. The manipulation of knowledge to meet the outcomes results in the production of context-dependent, behavioural courses that sacrifice theoretical knowledge (Wheelahan, 2006a:15). Furthermore, Gamble (2004) argues that unit standards fragment knowledge, as OBE tries to render explicit the facets of practice.

Difficulties with language, interpretation and complexity of unit standards are all themes in the literature that suggest that there are difficulties with accessing unit standards.

### 3.6.3 Finding a Role for Knowledge

Theories in the literature review argue from different perspectives that the acquisition of knowledge is complex, systematically structured and that teaching and learning should focus on knowledge. Unit standards, with their stipulated outcomes, attempt to render all aspect of a practice explicit, however theorists like Gamble (2004:3) argue that tacit learning is essential to knowledge acquisition. Equally important is the influence of a COP on learning, particularly within organisations that require the transmission of operational and procedural knowledge functions.

Organisational knowledge is rooted in practice (Wenger, 1998:52-3) and in this respect knowledge acquisition within organisational practice is linked to an understanding of a department's processes and procedures, often specific to a particular organisation. Furthermore, as individuals respond to challenges within in the workplace, they are expected to apply their understanding of their practice to situations as they emerge.

Therefore the final finding from the literature argues that knowledge needs to be returned to a central role in the teaching and learning process.

## 3.7 Conclusion

This chapter has focused on issues and debates that concern unit standards and introduced some arguments from sociology of knowledge. It has introduced arguments from an educational perspective concerning the representation of knowledge and unit standards, and has attempted to address unit standards from a perspective that favours foregrounding knowledge in education.

The way that course designers use and engage with unit standards during the course design process was the motivation for initiating this research report. Literature was introduced to provide a context for the unit standards and concerns of sociology of knowledge. This literature review will also provide the analytical foundation for the data analysis in the next chapter.

# 4 DATA ANALYSIS

## 4.1 Introduction

This research was motivated by personal curiosity and concerns that emerged along with the introduction of unit standards. How other course developers felt about unit standards, and if course developers shared common views about these documents, formed the starting point of this research. This research report has so far introduced the research, discussed the methodology and introduced the literature that will frame this data analysis chapter.

The research question guiding this research research report asks how corporate course developers use and engage with unit standards especially when designing learning programmes.

This chapter interprets the comments of the interviewees and analyses the data according to claims and themes based on the literature review and the research question. By integrating evidence from the data with theoretical material it is possible to develop a picture of how course developers use unit standards in workplace-based training and development.

The interpretation of the interview data involves accessing and understanding the meaning and value that the interviewees ascribe to unit standards in the workplace context. Their comments will be compared and contrasted to some of the claims addressed in the literature review. The intention of this part of the research is to explore the human side of workplace-based training under the NQF, to hear firsthand how course designers engage with unit standards when designing learning programmes and to try address their comments from a theoretical perspective, and in doing so, positioning them as actors in a larger framework – as South Africans working in organisations, implementing unit standards-based training. This chapter will also help position the course designers and their organisations as interpreters and implementers of SAQA policy.

The three minor questions (section 1.4) have helped define the scope of the research and the interview discussions. The literature review focused on unit standards and on vocational knowledge, while the interviews attempt to address all of the research questions from the point of view of the course designers. The questionnaire used in the interviews is contained in the appendix of this research report.

The main claim argued in this chapter is that unit standards are essentially complex, inaccessible documents that are mostly disregarded by course designers. This claim is based on evidence from the interviews, and substantiated by evidence from the literature. The

themes identified in the interviews will be interpreted according to the contents of the literature review.

## 4.2 Chapter Overview

This chapter will begin by introducing the formal case studies of this research research report. This will include the interviewees and their organisations, keeping in mind that the names of the individuals and the companies have been changed to ensure confidentiality. The training approach of each company is also discussed. A brief overview of the informal interviews is also presented, even though the data analysis draws primarily on the formal interviews.

The analysis in this chapter is organised into three main themes.

1. The first theme concerns course designers' understanding of what unit standards are and why they were introduced. This section is entitled 'A Matter of (in)Access'. It addresses concerns with unit standards that involve access. The main claim raised in this section is that problems with the wording and design of unit standards inhibit access. Course designers' concerns covered in this section include accessing and understanding the purpose of unit standards, the need for mediation in accessing the NQF, and problems with identifying the relevance of unit standards.
2. The second theme is concerned with learnerships and the central role these courses play in the organisations' desire to contribute to social justice in South Africa. This section is entitled 'Social Justice – the Accidental Outcome'. The interviews reveal that course developers do not identify any real value in using unit standards as a means to structure organisational course development. However, course developers do use unit standards for designing their learnership courses. This is because the learnerships represent a different set of values and organisational objectives, specifically providing an opportunity to expose previously disadvantaged persons to a year's learning and employment in a large organisation. The claim examined in this section argues that course developers will use unit standards in situations that do not have a perceived economic impact on the organisations, like with the training and development of learnership participants. In this respect, the focus is on a different objective, a social objective, namely that of social redress and of justice, themes that were strongly endorsed by all the interviewees.
3. The third theme focuses on ways of interpreting unit standards and the status of knowledge. This section is entitled 'Tackling Course Design and Knowledge'. The main claim in this section is that by foregrounding unit standards and outcomes, the significance of the knowledge component is diminished. This claim is addressed in

two ways. The first addresses issues of interpretation of unit standards, and will show the ways in which the course developers interviewed engage with unit standards. The second focus is on the status of knowledge in organisational course design. This section will examine how the course developers view the role of knowledge in course design.

These three sections were organised in response to the most prominent issues raised during the interviews. This chapter will argue that even though course developers have welcomed the concept of 'standards' to guide their work, their views suggest they struggle to use unit standards when designing courses.

This chapter will conclude by discussing and summarising the main findings of the research.

## 4.3 A Matter of (in)Access – Unit Standards in the Workplace

The main claim argued in this section, is that unit standards are essentially complex, inaccessible documents that are mostly disregarded by course designers.

This section will explore this claim from the perspective of access, which emerged as a prominent theme during the interviews. This section begins by showing how the mere introduction of unit standards heralded confusion and uncertainty within the organisations interviewed for this research report. The reasons behind this will also be addressed. Concerns with unit standards that have been raised in the literature review and in the interviews will be detailed in this part of the data analysis.

This section will address the above issues from three perspectives. The first concerns issues of access arising from not having a socio-economic or political understanding of why unit standards were introduced. This section addresses the 'big picture' regarding the introduction of unit standards. The next section will explore how general confusion brought about by the wording of unit standards can prevent access. The third and final section addressing this theme concerns issues of perceived relevance regarding unit standards, their credits and qualifications.

### 4.3.1 Context

Allais (2006:229) argues that the origins of unit standards are opaque, with almost no easily accessible documentation available on this topic. SAQA's website makes it clear that unit standards were introduced into the NQF as a means to establish broad based educational transformation in South Africa and to redress the inequality of apartheid education (SAQA – NQF overview, online source). But there is little information available about this. In this

respect, all the interviewees inferred that unit standards were in some way linked to social justice and apartheid, but they could not extend the link beyond that.

> ***Jim, Blue House:*** *I think it has something to do with the previous dispensation, it had to be rectified. It is a chance to start afresh after 1994. We inherited it from Australia where it was up and running, but the real history, well....I don't know.*
>
> ***Rolene, Red Planet:*** *It was because of the apartheid system. I think Bantu education.....because it excluded people from the system. If somebody had been a toolmaker for donkey's years but had no formal certificate, unit standards could be used to show they have done this or that. Unit standards were introduced to standardise the education system, we got them from Scandinavia where they used them to redress skills shortages.*
>
> ***Karen, Red Planet:*** *to help the previously disadvantaged, to skill people.*
>
> ***Amy, Evergreen****: To standardise education.*

These answers suggest that the interviewees had some understanding of the spirit behind the introduction of unit standard, but lacked concrete details about the processes involved in their introduction into the NQF.

These quotes represent the entirety of the interviews dealing with the origins of unit standards and the NQF. Not one of the interviewees had any understanding of the reasons behind the introduction of unit standards, their roots or the exact purpose of the documents. This suggests that none of the organisations have an understanding of the political or economic goals proposed by SAQA. Their sense of purpose is primarily focused on the workplace and ensuring that their companies' targets are adhered to.

The inability to locate the NQF within a social, economic or political context was not the primary research objective of this research report. However, given the problems of access to be discussed in this section it becomes clear that there is an overall disconnection between the objectives of SAQA and the capacity to implement these objectives by stakeholders. One of the obstructions to implementation is that the NQF appears to be inaccessible at so many levels.

The next section will address how confusion surrounding the unit standards inhibits access to it.

### 4.3.2 Confusion

Without exception, all the interviewees could not make sense of unit standards when they were initially introduced. They did not know what they were, what they were for, nor could they reference them to any other educational system.

> ***Rolene, Red Planet:*** *They seemed to be very strange documents. I first heard of them when on a workshop at Wits Business School in 2002. The lecturer confused herself talking about SAQA, unit standards...by the end we were all confused.*

From the start, it appears as if unit standards have never met SAQA's goal of communicating educational and training outcomes necessary for competency (Isaacs, 2008:8). Access has further been complicated by unit standards being perceived as complex, vague and subject to multiple interpretations (Berlach and O'Neill, 2008:50; Umalusi, 2007:39).

The 'confusion' extended to every level of SAQA's delivery chain, this included the learners,

> ***Jim, Blue House:*** *Learners still don't have a clue what they are for....no matter how often we explain...'*

Course developers said they could also not understand the purpose of unit standards when they were first introduced. When asked about their experience of their initial introduction to unit standards, the interviewees all commented that unit standards were *'very strange', 'mind-boggling', 'confusing'*.

This kind of response to unit standards suggests that the reaction extended beyond a problem with interpreting the content or words of a unit standard. There was something that unbalanced all the interviewees when introduced to unit standards for the first time. For Jansen (1998) this 'confusion' can be linked to his argument that OBE policy was primarily driven by political imperatives, and overlooked the existing 'realities' of learning within a classroom[5]. This could also suggest that course designers already had a concept of how to perform as course designers, and that unit standards did not resonate with their own experience.

The uncertainty regarding unit standards and OBE was recognised by SAQA, who responded with more documentation, this time to guide the process of course design (SAQA, 2005:1). Far from being an accessible mechanism to develop skills, unit standards appear to require extensive mediation regarding their interpretation, assessment and execution (Allais, 2006:282). Other unit standard accredited courses followed, and the one mentioned repeatedly in all three interviews concerned the 'Assessors Course'. This suggests quite

[5] Even though Jansen is focusing on schools in this paper, his arguments concerning OBE apply with equal strength when discussing the introduction of OBE in organisations.

strongly, that without some kind of mediating factor, the world of education created by the NQF is inaccessible.

In all three cases, the interviewees attended 'Assessor Training' in order to learn about what unit standards were and how they should be used to assess candidates and design courses. Without exception all three interviews concurred that as soon as the course designers attended an assessor course, where the concepts involving unit standards were explained, they understood what unit standards were and how to use them.

> ***Tina, Evergreen****: I never attended an assessor's course, but my first manager had attended one, and she told me about unit standards. If it had not been for her I would never have understood what they were or what they were for.*
>
> ***Karen, Red Planet****: I helped write some unit standards, and I went on an assessor's course. Even though I understand them, we still don't really use them.*
>
> ***Jim, Blue House****: the assessor's course helped me to understand what the INSETA expected of us. But we still use our own methods, like scanning the unit standards for relevant outcomes...but we still write our programmes in ways that satisfy our employees.*

The interviewees were asked to describe how they felt about unit standards after they had attended the assessor course. What is of particular interest here, is that in all cases, the course designers had learned the 'language' of SAQA, could talk about 'credits', 'outcomes', 'assessment' to mention some concepts. They all agreed that after they had attended the assessor course, they knew what unit standards were, and how they should be used in an organisational context.

> ***Amy, Evergreen****: Once I understood what unit standards were, I found the concept refreshing. It meant for me that there would be standardisation, all universities would give the same BA for example...there would be a certain level of benchmarking.*

However, even though the interviewees all maintain that they 'understood' unit standards after the assessor course, other discussions about training, course design and assessment suggest otherwise. In the comments printed above, Amy confuses 'standards' with 'sameness'. During the interview Amy contradicts herself, as do the others, when she perceives the work of Evergreen as having met the 'benchmark' or 'standard', but the credits employees bring in from other organisations are perceived to be 'below standard', even though all the courses are 'accredited' and aligned to unit standards.

Confusion surrounding unit standards therefore appears as a dominant theme in the interviews.

### 4.3.3 Relevance

What emerged during the interviews is that only Evergreen had tried to implement unit standards as an overarching training methodology in their organisations. In the other two cases, Red Planet and Blue House, unit standards-based training was reserved primarily for learnership[6] programmes. All other training conducted was based on the departmental or organisational requirements. This section will address this situation, arguing that these organisations regard unit standards as irrelevant to their training objectives.

The interviewees indicated that after attending the assessor' course, and acquiring some clarity on unit standards, they still had not used these documents in their core training programmes. Why speak in favour of the NQF on one hand, yet disregard it on the other? Here the interviewees questioned the relevance of unit standards to organisational objectives. All three organisations interviewed commented that they could not understand why all training had to be qualifications driven or based on unit standards that represented a part-qualification.

> ***Jim, Blue House:*** *The qualifications and unit standards do not meet the real business needs of our organisation. Why give someone a certificate for completing a telephone etiquette course, or a time management course? What is more important for us is how they perform after the training...has the training helped them to work more efficiently?*

Red Planet and Blue House did not believe that all training had to be qualifications driven, nor did unit standards in their present form meet their business objectives. All three organisations use some unit standards to a lesser or greater extent, but Red Planet and Blue House mainly used them in their learnership programmes. This is because the course designers and their managers realised that these documents do not serve the broader training needs of their organisations.

> ***Rolene, Red Planet****: Only the most basic of office functions can be assessed explicitly. The more complex functions just don't fit a unit standard format.*
>
> ***Tina, Evergreen:*** *the unit standards just don't provide the structures we need to advance the organisation...*

[6] Learnerships were introduced in 1998 to replace the apprenticeship system (Gamble, 2004: 19). New learnership qualifications were introduced in industries that have no historical apprenticeship system, like the leanerships in the financial services industry. Learners are essentially involved in a work/study programme, that results in the acquisition of unit standards-based credits that ultimately result in a qualification. The success of the learnership system is not the focus of this research, and is only mentioned because the course designers are involved in developing programmes for this qualification.

> ***Karen, Red Planet****: Most (unit standards) don't relate to our business needs. What are we supposed to teach to, the needs of the organisation or the requirements of the unit standard?*

This is confirmed by Allais (2007:196) who argues that the original objective of unit standards was to provide a framework for achieving qualifications, but through over-specification have become 'linguistic documents' that demand adherence to their structure and format at the expense of disciplinary goals. Essentially the organisations interviewed could not see the relevance of using unit standards at every level of training.

The outcomes listed on unit standards allude to the content that needs to be addressed and it is the selection of outcomes that concerns Karen (Red Planet). How a qualification is designed, and by whom, is of concern to her, as she had participated in the design and writing of unit standards for the financial services industry.

> ***Karen, Red Planet****: when I worked on the SGB, the most important people, the top people in the field were absent. The unit standards were written by people like me, people who have no formal qualifications in any area of the financial services industry. How will anyone ever know if the unit standards represent the best practice of the industry?*

In this quote, Karen addresses a very real concern, namely that without a strong disciplinary base, how can the SGB participants be confidant about the selection of outcomes that contribute towards a qualification. Her feeling is that unit standards are '*highly problematic*' because people with the real knowledge of the financial services industry did not participate in the design of the unit standards or the qualifications for that industry. In this respect, it is not only the language or wording of unit standards that concerns her, but also the credibility of the people who created the unit standards that are being applied across an entire industry. This is one of the concerns that contribute to Red Planet excluding unit standards from their core course design and training programmes.

> ***Karen, Red Planet:*** *The outcomes do not meet our requirements*.
>
> ***Rolene, Red Planet****: ..And, business needs can change quite fast. We need to be able to respond immediately to challenges, not wait for months to draft a unit standard on that (business) issue.*

Despite the problems and concerns raised by the interviewees, a prevalent comment made by all was that they welcomed some kind of structure in the course design process.

> ***Amy, Evergreen:*** *I was glad when they arrived, it meant there would be some kind of standardisation, some level of benchmarking.*

***Karen, Red Planet:*** *Without unit standards course design is on gut feel, what I think is necessary – my focus would reflect my personal background and not what is required.*

***Tina, Evergreen:*** *Compliance is a priority for us, and a training structure would be helpful.*

Even though interviewees agreed there was a need for some kind of structure, they then question, in the next set of quotations, the necessity to provide qualifications for training that has no real disciplinary or vocational foundation.

***Rolene, Red Planet****: Why should all courses end with a qualification?*

***Jim, Blue House****: It does not make sense to give certificates for all training.*

So far this section on the relevance of unit standards has shown that while course developers have serious concerns about unit standards, they are not opposed to some kind of regulation or standardisation that could act as a guide when structuring courses. Data from the interviews indicate that Red Planet and Evergreen would welcome some kind of standardised course design structure. This was particularly pertinent in situations where the course designer was uncertain of the quantity or depth of content to include in a course.

***Karen, Red Planet:*** *we can never be experts in everything, and it would be helpful to have some kind of user-friendly guide available to help us plan some of the courses.*

In situations of uncertainty Karen and especially Tina and Amy, believe that standards are important and can guide practice

### 4.3.4 Informal Interviews – A Different Experience

All the people interviewed informally were working as consultant course designers and trainers across a wide range of businesses and organisations. Seven of the eight people interviewed spoke about having little or no commitment to unit standards. Only one of the eight, Kurt, works primarily with unit standards and is immersed in the language and culture of SAQA and will only write, train and assess according to unit standards. However, when discussing unit standards, their origins and why they were introduced, he knew as little as the other interviewees. He is primarily working in research reports sponsored by the SETAs and therefore needs to comply with their requirements.

Peter and Alice, who have been involved with writing unit standards, explained that in their opinion unit standards represent the interests of the people sitting on the SGB more than the industry's requirements as a whole.

> ***Peter, Informal Interviewee:*** *Unit Standard development depends on who is on the SGB[7]. Most SGBs are cliques and develop unit standards to represent their own interests and not those of a broader industry. The process is not inclusive.*
>
> ***Alice, Informal Interviewee:*** *They are written to meet other people's needs, not mine and not my clients'.*

None of the informal interviewees appeared concerned about not being able to place unit standards in a historical context. They were more concerned about not knowing what to do with unit standards, or how to read and work with them. In this respect their concerns are very similar to those raised in the formal interviews.

They report high levels of confusion when trying to interpret unit standards, resulting in unit standards largely being disregarded from the course design process. One respondent, Alice, commented that the language was difficult and unit standards were not written with the end users in mind.

According to the informal interviewees, unit standards were a hindrance, complex, difficult to interpret and did not have any link to any course design strategy they were previously familiar with. Some had tried to follow a unit standard as a basis for course design, and had given up the task.

> ***Alice, Informal Interviewee:*** *Unit standards muddle my thinking because I know what I want to say and do. But when I read a unit standard I get confused. The way I think and the way unit standards are written is so different*.

Alice, in this example could not integrate her own understanding of the topic with the requirements and flow of the unit standard. Other informal interviewees reported the same experience.

> ***Clair, Informal Interviewee:*** *If we don't understand something written in a unit standard, we skip it and move on to the next statement*.

The informal interviewees regarded unit standards as relevant only when their clients required unit standards-based courses. If the client did not require that unit standards form the basis of a training programme, then course development proceeded as usual. If a course had to be based on unit standards, most of the consultants interviewed examined their existing materials alongside a unit standard and ticked off the content against the criteria. If they thought the materials did not contain sufficient content to meet an outcome, then they would include an activity or paragraph to meet the conditions of the unit standard. The 'design down' approach introduced by SAQA (SAQA, 2005), was not a method used or

[7] SGB – Standards Generating Bodies. Groups of industry-based specialists or interested parties, who developed unit standards for a qualification or part qualification in a learning area.

required by these interviewees with the exception of Kurt, who worked entirely within a unit standard framework.

The rest of the course designers appeared to have attitudes similar to Jim from Blue House regarding the role of unit standards in training and development, namely they placed the needs of their clients above compliance to a unit standards framework.

> ***Emma, Informal Interviewee:*** *Unit standards do not meet the training requirements of business. Business development moves at a different pace and direction to the SETAs, SGBs and existing unit standards. The SETAs cannot and do not know how to keep up with business demands and they (the SETAs) have no idea how any business works.*

Most of these interviewees held highly pragmatic views on unit standards. As self-employed consultants they were prepared to meet their clients' demands, and would therefore use unit standards only if it suggested they would get the course development contract.

> ***Mavis, Informal Interviewee****: Most clients never ask for unit standards-based training. They just don't talk about it.*
>
> ***Clair, Informal Interviewee****: If a client requests unit standards-based courses, then naturally I will ensure that my course covers all the necessary outcomes. But I would never deliberately start course development with unit standards - I would prefer to find out what the client requires first.*

The views expressed by Mavis and Clair indicate that even though they hold strong opinions about unit standards they will still work to the requirements of the client. In this respect, the circumstances of the informal interviewees, is significantly different from that of the formal interviewees. The formal interviewees' attitude towards unit standards is primarily constrained by their department's policy regarding these documents. In this respect, the formal interviewees use unit standards when and where they are expected to in accordance with their organisation's demands. However the informal interviewees have to adjust to the attitudes and values of each particular client regarding unit standards. Even though they hold strong opinions about these documents, they need to be flexible enough to adapt themselves to the clients' approach to unit standards-based training – whatever that may be.

The informal interviewees discussed how unit standards had impacted on their work and their ability to procure more work. They held strong opinions on unit standards and how these documents had impacted on their careers.

> ***Alice, Informal Interviewee:*** *The people who introduced unit standards and OBE had no idea how a unit standard relates to business. You can see this by the way they are*

*written, they are non-specific and almost never fit the immediate needs of the company.*

***Peter, Informal Interviewee:*** *The paperwork has increased, everything seems to be about filling in forms, finding the 'right' unit standard for the 'right' course. All this takes time, and we don't get paid to do it. This is not a system created by people who have had to run their own businesses.*

In conclusion, all the informal interviewees had opinions about working with unit standards, and most of these opinions were very similar to the formal interviewees. Of concern for this group of interviewees, was the impact that unit standards had on how they designed and marketed their courses, as some companies wanted unit standards-based courses, while others (most) were not concerned about these documents.

### 4.3.5 Section Summary

The overriding claim of this research report argues that course designers experience unit standards as essentially complex and inaccessible documents. This section addressed a facet of this claim, by discussing issues of access regarding the interpretation and use of unit standards.

The results of this part of the research indicate that problems concerning access have resulted in companies not using unit standards during the process of course development. Not having a clear understanding of the background to unit standards, their history or origins, may prevent full access and participation in the NQF. The complexity of the NQF, problems with knowing how to interpret unit standards or use them in organisation, appeared to be remedied only through mediation. For organisations this took the form of the assessors' course. Yet, even with this course, there are other problems that concern the interviewees.

The data from the informal and formal interviews indicates that course develops do not seem to have a shared understanding of what unit standards and OBE are and this lack of conceptual understanding results in difficulties in implementing the NQF (Berlach and O'Neill, 2008:50). Both the formal and most of the informal interviewees did not think that all training had to be credit or qualification driven. They also argued that unit standards did not meet the training requirements of their respective organisations or clients, which in turn raises questions about the relevance of unit standards.

## 4.4 Social Justice – The Accidental Outcome

This research report, when initially conceptualised, had not intended to investigate nor examine the relationship between unit standards, course design and learnerships. Yet the interviewees, when discussing unit standards, continually made reference to the people on their learnerships and how important learnerships were for their organisations.

Unit standards and learnerships intersect at the level of course design and assessment. This is one area where organisations did design and assess courses against unit standards, and provided the participants with a learnership qualification. Not only do the organisations provide the education and training for the learnership, but they also provide the qualification based on the unit standards.

Despite the arguments raised in this research report concerning the complexity of unit standards, there is one area where the formal interviewees use unit standards – namely when conducting learnerships[8]. This section will argue that the course designers interviewed formally for this research report are willing to use unit standards in this area of course development. This is because the objectives and ultimate goals of the learnership are different to mainstream organisational training and development. Evidence gathered from the formal interviews indicates that the value of a learnership resides in the capacity of the organisation to contribute to the development of previously disadvantaged individuals, by providing them with a year's opportunity to work and learn in the organisation. The overriding focus of the learnership year involves social, not financial or business objectives, and for this reason unit standards are used with a qualification as an end goal.

The value of a learnership, in the opinion of the course developers, does not reside in the unit standards-based coursework, but in the exposure that the candidates receive to organisational workplace practice. In this respect, the interviewees felt strongly that the learnership programme provided an opportunity for their organisations to participate in

[8] Interestingly, the same organisations that do not use unit standards for organisational training are using them when designing their learnership programmes. One of the factors that influenced organisations to implement unit standards-based training concerns the role of the Skills Levy. The Skills Development Levies Act was established in 1999 to implement a compulsory levy to pay for education and training outlined in the Skills Development Act (SARS, undated - version 2:4). Companies of a certain size are expected to pay a percentage of their total monthly salaries to the Skills Levy (Ibid:5) administered by the South African Revenue Service (SARS). This levy is recoverable provided the organisations can provide their SETA with evidence that training has taken place.

The learnerships are qualifications made up entirely of unit standards, and many large organisations in the financial services industry offer a year's learnership qualification. The participants receive a small monthly income from the organisation, and they spend the year dividing their time between work and training. The organisations can recover the learnership expenses from their SETA as per the Skills Development Levies Act. Investing in learnerships does not infringe on the organisation's bottom line as the cost are recoverable, and the organisations are not compelled to employ any of the participants once the programme is completed.

social and economic upliftment of South Africans who would not have an opportunity to access formal organisation-based employment.

### 4.4.1 Learnerships: A Pathway to Social Justice

Although all three organisations had mostly discontinued using unit standards in their core course design strategies, they still used unit standards in their learnership programmes offered in conjunction with the Insurance SETA[9].

> ***Jim, Blue House:*** *We have people with a matric or part-matric, they can't go back to school and we have to take responsibility, make provision for them. For these people we have ABET [10]and then the learnership. In this sense unit standards have a definite role.*

Jim spoke like this in response to being asked if he had any problems with using unit standards. In his opinion, the only real value of unit standards was in the provision of the learnership and ABET qualifications. All three companies spoke with sincerity about their learnership programmes. They valued the social contribution they were making by providing access to people who would ordinarily not have a chance to work in the financial services industry. This resonates with the values of SAQA (SAQA, NQF Overview. www.saqa.ac.za, accessed 2008) that highlight the importance of redress and social justice.

> ***Rolene, Red Planet:*** *Basically the learnership teaches them (the learners) about how to work, what work is about, and how to behave professionally in the company.*

Even though the interviewees all agreed that the learnership programmes satisfied their need to contribute to the social development of South Africa, they were sceptical about the actual value of the learnership qualification.

> ***Karen, Red Planet:*** *I am not sure that the learnership qualification will get them a job or access to tertiary education..or anything like that..*

They had mixed views on the value of this programme and how it impacted on the lives of the learners and the needs of the company.

> ***Jim, Blue House:*** *We don't really need the learnership participants, Blue House functioned well before the qualification was introduced. For me, this programme really is way of contributing to social development.*

[9] Sector Education and Training Authority

[10] Adult Basic Education and Training (ABET)– this company focuses on developing their employees' numeracy and literacy skills to qualify them for access to NQF courses.

> ***Rolene, Red Planet:*** *It's not a real qualification, and they get more from exposure to this environment than from the coursework.*

All three companies were highly aware of the social contribution they were making in running learnerships, even if they felt the qualification had no real value in terms of increasing employment opportunities outside the company or in terms of its educational contribution. This is because the outcomes on most of the unit standards related to office functions or procedures, or required content that could be acquired through reading magazines or newspapers. The unit standards-based course content would apply to a particular organisation's business practice and that would often not be the same as the business practices of another organisation. In this respect, the learnership participants were acquiring a qualification based on a company's business practices that could not be applied outside of that particular context. This explains why all the interviewees commented during the interviews, that they did not trust the accredited unit standards-based training provided by other organisations. These concerns will be discussed in more detail in the next section, when dealing with knowledge concerns and unit standards.

> ***Rolene, Red Planet:*** *The kind of knowledge needed in our organisation is not the same as the knowledge needed in another company. So we use the unit standard to train our knowledge, but it is not the same as the content from another company. It's the same unit standard, but different information.*
>
> ***Jim, Blue House:*** *Our course materials are specific to our organisation, most focus on our policies and procedures. These materials will probably not be of much value in another company or sometimes even in another department here at Blue House.*

Even though organisations have to recognise the credits obtained through another organisation, they do not believe the credit has any pertinence within their own work context.

> ***Tina, Evergreen:*** *We have to train the person again, even if they have a credit for that unit standard. The knowledge is just not the same as our company.*
>
> ***Karen, Red Planet:*** *Our hands are tied, we have to acknowledge the credits from other companies, but we still have to find a way of training the material again. It really depends on what the credit is for, because there is a difference between a general numeracy course and a course that focuses on customer relations. Maths does not change, but policies regarding how we treat customers shifts from company to company, so the employees have to be retrained.*

They will therefore train the same unit standard again, this time using their own content. This points to one of the core concerns with unit standards, namely, that they are designed to be used within a particular context. The emphasis on assessing 'what a learner can do'

and not what they know (DoL/DoE: 2002:77) has resulted in context-bound courses that have little value in other organisation.

All the interviewees argued that the real value of the learnership resided in the work experience acquired through working in the organisation when combined with coursework that explained explicitly the 'rules' of a large department.

> ***Karen, Red Planet**: We can see the individual growing. From not knowing how to dress (professionally), from not knowing about arriving on time, how to speak in an organisation (no yelling in the corridors)... We can really see how we have made a difference.*
>
> ***Amy, Evergreen**: The learnership year shows us the potential of the participants. It's amazing to see how they develop during the year.*

This short section on learnerships argues that the interviewees value the social contribution of learnerships above the educational value of the qualification. The interviewees felt strongly that exposure to organisational practice was beneficial to the participant on the learnerships, as they had access to workplace practice, which increased their chances of finding employment in other similar organisations. They did not feel that the actual learnership qualification could help the participant procure work, as all the interviewees pointed out that the course content mostly consisted of materials pertinent to the particular organisation. The literature that argues in favour of unit standards foregrounds the importance of *what* a learner can do (the outcome) rather than *where* a learner studies or acquired a qualification (SAQA, NQF Overview. www.saqa.ac.za, accessed 2008). Yet discussions with the course developers suggest the opposite, even though course developers are concerned with *what* employees can do or what they know, they are equally concerned with the *source* of the knowledge and the origins of a qualification.

### 4.4.2 Informal Interviews, Compared and Contrasted

Social justice did not emerge as a dominant issue of interest or concern in the informal interviews. This is because the formal interviewees were all located in large, wealthy organisations that had the infrastructure to provide for learnerships. The formal interviewees were all salaried and fully employed, and valued the opportunity to contribute to social upliftment in the context of the workplace. In contrast, the informal interviewees were all self-employed and dependent on procuring short or medium term contracts to ensure their economic survival. For this reason they did have the resources or the time to develop people within the constraints of their working day. Issues of social justice did not feature as a critical issue during these interviews.

Despite having no personal views regarding learnerships, some of the informal interviewees had developed numeracy and literacy programmes. Some of these interviewees argued that not enough was done by organisations to provide basic, foundation courses for their staff.

> ***Ruth, Informal Interview:*** *We provided the courses business requires, often they do not ask for courses that would give their employees basic skills like literacy or numeracy. You see businesses are not interested in education, they are interested in business. Educating their staff is just not a priority for most organisations.*
>
> ***Peter, Informal Interviewee:*** *We are just too stressed to stop and offer courses that do not have a clear, defined objective. We offer business skills, but if a potential employee does not have good enough skills, they probably will not get the job. I doubt the companies would invest the money and time to teach a person to read or count better.*

In this short quote Ruth insinuates that organisations could provide more 'education focused' courses, however...

> ***Ruth, Informal Interviewee****: ...businesses focus on the bottom line, they are in business to make a profit they do not see themselves as being part-time schools.*
>
> ***Mavis, Informal Interviewee****: We have to give the client exactly what they want, at the lowest price, otherwise they will go to someone else. They (and I) cannot focus on people who have such low skills. It's a pity, but it's a reality.*

In conclusion, self-employed consultant although highly aware of the need to social justice and redress in organisation, did have capacity to implement programmes to the same extent as their permanently employed organisation-based colleagues. The constraints facing the informal interviewees, namely issue of procuring employment, regular income and meeting the explicit objectives of the employer/client, are significantly different to the concerns of the formal interviewees who are able to focus on the development of learnership participants within the context of the workplace.

### 4.4.3 Section Summary

The formal interviews indicate that course developers differentiate between course development intended to advance the organisation and learnership programmes that focus on social redress and upliftment. Learnerships, from the perspective of the formal interviewees, offered organisations an opportunity to contribute to the social development of previously disadvantaged South Africans. The course developers were willing to use unit standards in learnerships because the participants were not expected to perform at the same level as the other employees. The context and pace of the learnership programme was

designed to introduce the participants to the world of work, and to the policies and procedures of the organisation. Even though the Learnership year primarily involved working within the organisations' structures, and limited the learner to the viewpoint of the employer, it did, most importantly, provide people who would not have a chance to access formal employment, with a year's exposure to an organisation.

In contrast, the informal interviewees only participated in 'social redress' when it formed part of the clients' course design objectives. This is primarily because the informal interviewees were all self-employed and worked according to the requirements of their clients.

Despite the formal interviewees using unit standards to structure their learnership programmes, the general consensus was that the participant gained more through a year's work exposure than from the unit standards-based qualification.

The next section will examine how course developers address issues of content and knowledge within a unit standards context.

## 4.5 Tackling Course Design and Knowledge

This section argues that by foregrounding unit standards and outcomes, the significance of the knowledge component is diminished. This discussion will focus on the interpretation of unit standards when designing courses, and the way that course designers view and value knowledge necessary for the courses in contrast to representing the outcomes on unit standards. In both cases, theories drawn from the literature review will be used to provide theoretical interpretations of the data.

### 4.5.1 Developing Courses and Unit Standards– Concerns with the Interpretation and Representation of Knowledge

The three organisations interviewed did not use unit standards in the same way when planning their courses. They had all attended an assessor course, and attribute their skills in interpreting unit standards to that experience. Even though they had completed similar unit standards-based assessor courses, they had reached different conclusions about the place for unit standards in organisational course design and training. They all agreed that the assessor course had clarified the purpose of unit standards, yet once they returned to the workplace and began using unit standards as a basis for course design, a different picture emerged.

> ***Rolene, Red Planet:*** *When I attended the assessor course, everything the trainer said about unit standards made so much sense. But then I came back to the office and I had to start using them to design courses. That's when the problems started.*
>
> ***Amy, Evergreen:*** *I really grasped the concepts at the assessor course, but using unit standards is more difficult than I thought it would be.*

What Rolene and Amy are referring to is a schism between the written outcomes of the unit standards and their perception of how courses need to be designed in order to be efficient and relevant. All the interviewees battled to explain why it was so difficult to match course design with unit standards, despite having access to information for a course.

> ***Amy, Evergreen:*** *I am not really sure, I suppose I have my own ideas about what I want to do... and now I have to find the content that I like AND try match everything to unit standards. It's difficult to explain really...*
>
> ***Jim, Blue House:*** *Reading them (unit standards) is really complicated, especially if I am trying to meet the specific requirements of a line-manager. It's like trying to think in two different places at once...about the same thing...but it's different.*

This section addresses the dilemmas that arose with the introduction of unit standards, namely how to comply with legislation and use unit standards as a basis for course design while simultaneously meeting organisational objectives. The interviewees discuss the consequences of using unit standards as a pathway to course design, and report on problems with the interpretation and translation of outcomes into courses. This section will show how knowledge within a unit standards framework is organised in accordance with the outcomes and not the flow and progression of the underpinning knowledge.

The engagement with unit standards differed between the organisations interviewed. Evergreen was the most compliant of the three companies. Blue House favoured a 'mix and match' approach to course design, where parts of a unit standard and the needs of the organisation were combined into a course. Red Planet did not use unit standards in any capacity other than with their learnership programme.

As a result of attending the assessor course, Evergreen adopted a version of SAQA's 'design down' strategy for courses where unit standards are used[11].

> ***Tina, Evergreen****: We first look at the outcomes on the unit standard, decide on how the outcomes need to be taught and then decide on what content to include.*

[11] Even though all three organisations interviewed had lessened the amount of unit standards-based courses in their schedules, all the interviewees had extensive experience in trying to develop courses along unit standard and outcomes approaches.

> ***Jim, Blue House****: I don't bother anymore, I may look at one or two unit standards, but I will start by deciding on the outcomes...what I mean is...what I or the line managers think the course should do for the participants.*

This 'design down' approach is largely due to the information they received during their assessor's course. Here, the actions of Tina (Evergreen) mirror the concerns raised in the literature, namely that an outcomes approach to course design does not begin with the interpretation of content, but with the outcome (Umalusi, 2007:39). Jim (Blue House) will also decide on 'outcomes', but the Blue House outcomes are determined according to the needs of the organisation or department. They are outcomes that make sense to the course designer.

> ***Amy, Evergreen:*** *First we read the unit standard, decide on what the outcomes are, this is the way we start the course design process.*

Evergreen is the only company interviewed that lends support to Berlach and O'Niell's (2008:50) argument that providers use unit standards as a curriculum guide. Red Planet, in this example, provides an example of why unit standards are not used to structure course design.

> ***Karen, Red Planet:*** *We can't use most of the available unit standards, they do not meet the training requirements of our company. Unit standards don't keep pace with changes in the industry.*

Evergreen has only recently stopped using unit standards as a means to structure their course design, as they conceded that using unit standards had not advanced the organisation's training objectives. However, the other organisations interviewed, like Red Planet, would only use some unit standards but would still use their own approach to course design. Both Red Planet and Blue House used their own approach when interpreting unit standards.

> ***Tina, Evergreen:*** *Up until recently we did all our training 'by the book'. This means that whatever we trained would have to correspond as much as possible to a unit standard. This was very difficult as sometimes there were no unit standards from our SETA that suited us. So we would apply to the other SETAs for accreditation to use their unit standards. We have only recently stopped this practice.*

Red Planet did not use the 'design down' method, instead Rolene began with reading the unit standard, and then decided on the assessment method before selecting her course content. This was her approach to managing unit standards, and it was a method she was comfortable using.

> ***Rolene, Red Planet:*** *I ask myself how I would like to design the assessment - that is where I begin. Then I design my learning activities to address the assessment and the outcomes. For example, if I want them to give a short presentation as the assessment then I design the course and the outcomes towards a presentation focused course.*

For Rolene, the design process was essentially about selecting assessment activities and then focusing on content that could be assessed accordingly. Again, this suggests that an outcomes approach can result in a wide variation of interpretations and courses (Jansen, 1998:28).

Blue House adopted a different approach to course design, focusing initially on the departmental training requirements. This is because Jim battled to extract meaning from unit standards just by reading them. He first identified the training requirements using a combination of his professional experience and information from interviews with managers and employees, to devise a training strategy.

> ***Jim, Blue House****: We communicate with our teams regularly to find out what kind of training they need.*

He referred to unit standards when he needed to find content or courses that reflected his training objectives. If there were no unit standards that could provide the structure he required, then he selected the unit standard that closely approximated his requirements or he would write the materials without a unit standard. Blue House hardly ever began the design process with unit standards, instead materials were selected based on the training needs of an individual or department.

> ***Jim, Blue House:*** *It would be fatal to focus on that (unit standards)....I think it is very important to focus on the individual and what the individual needs.*

Without mentioning the word 'knowledge' Jim implies that he places the knowledge requirements of the organisation above unit standards. The lack of a formal knowledge component in unit standards (Gamble, 2004:14) shifts the focus of training away from knowledge towards the acquisition of an outcome (SAQA, 2005:4). This is in direct contrast to Evergreen, who up until recently had expected the course developers to yield to the perceived requirements of outcomes and unit standards.

> ***Tina, Evergreen:*** *We did everything we could to be compliant, but it is just not working for us, we need to train according to the business needs of the company, not to SAQA's idea of what we need to do.*

Red Planet has very clear ideas about the limitations of unit standards in organisational development. They argue that simple workplace functions can fit a unit standards format, but more complex workplace functions cannot be expressed as outcomes. For Karen, the

ease of translating unit standards into course materials depends on the simplicity of the skills required in a course.

> ***Karen, Red Planet:*** *more complex functions like risk management, where you need a complex amount of information...these courses cannot work with unit standards because I have to match the theoretical content to a behavioural assessment. It's impossible!*
>
> ***Jim, Blue House:*** *I have never managed to work out how the writers of unit standards manage to break everything down into outcomes. For me it is very hard to break everything down into different sections, even if it is a very basic job. I really battle to do that.*

The issues raised by Karen and Jim indirectly points towards concerns regarding 'simple' and 'complex' concepts of knowledge. Their claim is that 'simple' knowledge is easier to teach and assess using unit standards, while 'complex' knowledge does not fall into the same category because it requires large amounts of 'complex' information. Karen's statement suggests that simple knowledge can be assessed behaviourally, while complex knowledge cannot. This is because work that appears to be more 'simple' can be expressed in language that is explicit, verbal and procedural (Gamble, 2004:14), far easier than other complex tasks. However, theorists like Jansen (1998:8) and Gamble (2004:14) would disagree with Karen by arguing that *all* knowledge functions are difficult to fragment and express within a unit standards format.

Differentiating between operational and procedural knowledge on the one side and disciplinary (Biggs, 1999:42) and declarative knowledge (Ibid; Wheelahan, 2004:6) on the other, also explains Karen's comment that she cannot use unit standards for more complex teaching functions, like risk management or specialised underwriting. As an experienced trainer she does not use theoretical descriptions of knowledge, yet she knows that these courses require disciplinary and declarative knowledge that cannot be explicitly expressed nor assessed behaviourally, in outcomes-based language (tGamble, 2004:199).

In conclusion, this section explores the different approaches of the organisations' interviewed to using unit standards as a basis for course design. Evergreen emerges as the most compliant of the three. Their focus on compliance results in a flawed training methodology resulting in course development that oblige unit standards but do not meet the training requirements of the organisation. In response, they now focus on course development that responds to the organisations' needs ahead of compliance to unit standards. Rolene, at Red Planet battled to apply her extensive experience in course development to a unit standards format. Even though she attended an assessor course, she experiences real difficulties when trying to integrate organisational training needs with unit

standards. Jim, at Blue House, focuses on organisational training requirements and does not try to use unit standards as a starting point for course design.

The next section will address how course developers select knowledge and content.

### 4.5.2 Content Selection

The emphasis placed on the selection and representation of knowledge lies at the heart of concerns raised about unit standards in this research report. Unit standards emphasise applied skill (Spady, 2008:1) and not the underpinning knowledge that informs practice (Gamble, 2004). The implications of this approach are examined in this section from the perspective of how course designers set about the task of selecting course materials. In turn, concerns with the selection of content have implications for the status of knowledge, and this will be addressed in the next section.

The claims raised in this section will argue that that the current content selection process for all interviewees, does not appear to be dissimilar from the way content was selected prior to the introduction of unit standards. However, unit standards, with lists of specific outcomes, have influenced the way that content is represented within a course.

Most of the courses designed by the interviewees are not discipline based, and focus either on workplace functions and procedures or emphasise working relationships. Courses with a functional focus would include telephone or time management courses, while courses with a focus on relationships could include negotiation or presentation skills. Most of the course development required developing employees' operational or procedural knowledge, knowledge necessary when working in a call centre or for handling paperwork and general office duties. The more specialised courses offered within the organisations, courses that focus on accounting, law or finance, tend to be offered by FET colleges or professional organisations[12]. None of the interviewees are expected to develop courses that have a clear disciplinary basis.

The interview data suggests that the process of selecting materials has not been significantly influenced by the introduction of unit standards, as the interviewees report using similar selection methods prior to the introduction of those documents. The interview data indicates that content selection is a combination of accessing popular or contemporary literature, trawling the internet and above all, a reliance on intuition and 'gut feel' when selecting content.

> ***Jim, Blue House:*** *We still look for content for our courses in the same way. What has changed is that we may have to include more information or increase the assessment*

[12] Even though many of these courses are unit standards-based, they are not investigated as they fall outside the scope of this project.

*component of a course to meet the criteria of a unit standard. But we still decide what to include or exclude.*

***Karen, Red Planet:*** *I depend on finding experts at work. I ask them for the information and then research the course using magazines, books or the internet.*

The content required for their courses is sourced primarily from books, newspapers, magazines and internet sources. In all three interviews the course developers select their course materials primarily from the internet.

***Amy, Evergreen:*** *When I start planning a course, I look at the unit standard, look at the outcomes and then use the internet to find the best content for the course. I decide on the key words and then use Google to search for websites.*

***Rolene, Red Planet:*** *I use the intranet and the internet.*

***Tine, Evergreen:*** *I read industry magazines and Google.*

The interviewees decided on specific content for a course by selecting materials that they thought were best suited for the course, or reflected the leading business ideas, or books that were popular in the media in their area of interest.

***Jim, Blue House****: We look for the industry standard, always identifying the best practice in management. We also try to read the most popular management books being used in business schools or in other organisations.*

***Rolene, Red Planet****: For some courses I give the students the question or the task and let them find the content. Sometimes, the content has to match the task...not the other way around.*

What was clear from the data was that all five interviewees relied heavily on their experience and personal intuition as the main guide when selecting content.

***Amy, Evergreen:*** *I look for information that 'feels' right for me... information that seems to fit with what I want to achieve in the course.*

***Jim, Blue House:*** *The materials have to make sense to me, I won't use them if I disagree with the writers.*

***Karen, Red House:*** *I try speak to experts, but in the end, I am the one that decides what to put in or leave out of the course.*

How the organisations identify the 'industry standard' was not clearly established in the interviews. One approach was to provide materials that reflect contemporary ideas that mesh with existing workplace practice.

> ***Tina, Evergreen:*** *We try find out what the norms are in the industry, and use that as a guide.*
>
> ***Karen, Red Planet****: I try find out what similar departments are doing all over the world... for that I speak to people who have been at conferences. That is one way to select materials.*

The selection of content for courses necessary for organisational workplace practice primarily needs to reflect the requirements of the organisation. This is why Jim (Blue House) insists that course design should focus specifically on the needs of the individuals or departments within the organisation, and not on unit standards and outcomes.

> ***Jim, Blue House:*** *We have an obligation to support people in their jobs, not just train for its own sake.*

The interviewees did not believe that unit standards offered sufficient information about the trajectory of the course.

> ***Rolene, Red Planet:*** *When you sit down with a unit standard and try plan a course...that is when you realise how difficult it is to match what you need for a course with a unit standard and all the outcomes. It's very, very difficult.*

Even Evergreen, who had been the most compliant with implementing unit standards in all training areas, could not reconcile all the outcomes with their organisational training needs. This resonates with Jansen's (1998:8) argument that outcomes fragment knowledge, making it very difficult to teach and assess[13] within an outcomes framework. Jansen argues that this is because the listing of each outcome as a separate and specific entity is not connected to any recognised knowledge acquisition processes (Ibid).

Ironically, the capacity for unit standards to direct course designers towards the industry standard appears to be no more effective than the course writers' reliance on their intuition or Google. Without experience in a field of practice or some understanding of the theoretical knowledge underpinning a practice, content selection appears to remain in the realm of gut feel and intuition, or at the mercy of a search engine like Google.

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[13] Assessment of Outcomes: Although this project is not addressing the issues and debates concerning assessment of unit standards-based courses or qualifications, it is nonetheless important to acknowledge some of the concerns regarding assessment. OBE focuses on teaching towards and assessing against outcomes, where an outcome can indicate a particular standard of performance demonstrated in a defined context. Therefore competent 'performance' in one context can differ from competent 'performance' in a different context or with a different assessor (Griffin et al, 2007:22). Of concern in situations like this is that the concept of 'competent' is not a static concept, and that as workloads shift and change so too does the concept of 'workplace competence'. Ironically, competency in a unit standard is meant to suggest that the candidate has met 'the standards of performance expected in the workplace' (Ibid) yet does not imply that the learner can perform should workplace conditions change. This is also because unit standards assess outcomes and not underpinning knowledge.

Karen was particularly concerned that she was not an expert in the areas she designed courses in, and therefore could never be sure if she had overlooked a crucial fact.

> ***Karen, Red Planet:*** *you have to be honest and admit you are not a content expert and there are times that I don't have a clue. I interview the experts at Red Planet, but they often don't have the time to sit with me. I know I can put the stuff (materials) together just by following the unit standard but you never can tell what you are missing, because you don't know exactly what should be put in there…*

Evergreen has similar concerns but had persisted with the unit standards, trying to write all their materials in accordance with the outcomes.

> ***Tina, Evergreen:...****we have found it very difficult to follow the outcomes, especially when they don't apply to our organisation. It wastes time and we don't have access to the information needed to meet the outcome. Sometimes we don't know what information we are expected to include. It's very frustrating.*

The introduction of unit standards as a basis for course design has also exposed course developers to additional content that would not previously have been included in a course. Jim (Blue House) touched on this concern earlier in this section when he said that the introduction of unit standards has resulted in '*more information to meet the unit standard criteria*'. He was concerned with the inclusion of superfluous materials into his courses just to meet the requirements of unit standards, a concern shared by Tina (Evergreen). Allais, (2007:139) argues that there is no definitive relationship between outcome and content, as any content can be selected provided it can be shown to meet the outcome. All the interviewees voiced concerns about matching outcomes to content. When unit standards were used as a starting point for course design, the interviewees confirmed Allais's (2007: 166) concern that knowledge is selected instrumentally to serve the outcome.

The interview with Evergreen provides an example of what can happen when course designers try to include all the outcomes without having a background in a particular field or knowledge domain. During the interview Amy (Evergreen) discussed the design process for unit standard that dealt with 'intelligence'. The outcomes asked for different kinds of intelligences, specifically intellectual, emotional and spiritual intelligence. The content selection process began with Google, where she used 'intelligence', 'emotional intelligence' and 'spiritual intelligence' as separate key words when searching for materials. She did not discuss her criteria for 'intelligence', but for 'emotional intelligence' she used Daniel Goleman's bestseller 'EQ' as a basis for the course. The book is well known internationally and one she had already read, making it an obvious choice for the course. However, she also needed to include a component on 'spiritual intelligence' and again searched Google using 'spiritual intelligence' as the key words. There were a large number of options to

select from and after reading through a number of websites, she selected materials from a website dealing with religious and spiritual mystics[14]. Because she lacked experience in spiritual intelligence as a knowledge domain, she had inadvertently included materials that could be perceived as offensive to the more religious participants on the course. Her sincere response when asked how she justified her content selection, from a site that some perceive as a cult, was to argue that it made intuitive sense to her.

***Amy, Evergreen:...i****t made sense to me. I liked what they said on the website.*

In conclusion, the data from the interviews indicates that the introduction of unit standards has not influenced the way that course developers select materials for their courses. The most significant influence on the content selection process appears to be the internet, with a specific emphasis on using Google as a search engine. Ultimately, in the absence of experience in a particular knowledge domain, the selection of materials remains primarily at the level of intuition and personal experience. According to the interviewees, the introduction of unit standards has complicated course development, because the additional criteria listed in the outcomes need to be inserted into the courses, even when it is not pertinent to individual, departmental or organisational requirements.

### 4.5.3 Section Summary

The evidence from the interviews suggests that unit standards have complicated the course design process as course designers grapple with the integration of content they need to include and the outcomes listed on the unit standard. The introduction of unit standards had placed the interviewees in a situation where they had to either select content based on the unit standard outcomes, or content that related to the organisation's training and knowledge requirements. Evergreen holds strong values concerning compliance, and clung to unit standards-based training far longer than Blue House or Red Planet.

The interviewees argue that unit standards have complicated the course design process, as the outcomes often conflict with the organisation's requirements. However, regarding the selection of content, it appears that unit standards have not influenced the way course designers select content. The internet, coupled with the course designers' intuition and personal preferences, provide the basis for most content selection. Where unit standards were used as a basis for course design, the content was inevitably organised to meet the requirements of the outcomes, a concern noted and discussed by different experts in education (Jansen, 1998; Gamble, 2004; Allais, 2007).

[14] The name of the website and the religious orientation of the content has been changed, as she selected materials from a group that has a reputation for being a cult.

### 4.5.4 Informal Interviews, Compared and Contrasted – Content, Materials Development and Knowledge

The way that the informal interviewees selected course materials mirrors the data obtained from the formal interviewees. Like the formal interviewees, all the informal interviewees had developed their own strategies for integrating course design with unit standards.

> ***Alice, Informal Interviewee:*** *...they (unit standards) disrupt my 'natural' approach to writing and thinking. I use my personal experience to guide and mould training. In many ways it is like a craft, you need time and experience, good mentors and good role models.*

> ***Mavis, Informal Interview:*** *I develop a course around current best practice or the most popular writer or book that focuses on a particular area.*

Kurt, the only interviewee that exclusively used unit standards, would select materials according to the stated outcomes.

> ***Kurt, Informal Interview:*** *I follow the outcomes choose materials and content that satisfy the requirements of the unit standard.*

All the informal interviewees list the internet as a primary source for materials and course design ideas. With regards to the selection of content, the informal interviewees are very similar to the formal interviewees.

When using unit standards as a basis for course design, Kurt was the only informal interviewee who began the design process using the specific outcomes as section headings in his course. Using the outcomes as a guide, he placed materials relevant to the outcome in each section.

> ***Kurt, Informal Interviewee:*** *You cannot easily integrate a number of unit standards into one course. It makes the facilitators and the learners confused. It is much better to teach unit standard by unit standard, outcome by outcome*.

Yet Kurt's adherence towards unit standards stands out as significantly different to all the other formal and informal interviewees. In this respect he was the only interviewee who did not have anything negative to say about unit standards in organisational training and was committed to using them in all course design processes.

Other course designers, like Mavis, were critical of using unit standards as a starting point for course design.

> ***Mavis, Informal Interviewee:*** *If I start (to design) with the unit standards...I get poor results. Not sure why, but the course will not hang together well.*

Without mentioning the word 'knowledge' Mavis has placed knowledge and course design above unit standards. Her focus is on knowledge and not on SAQA's goal of acquiring the outcome (SAQA, 2005:4).

> ***Emma, Informal Interviewee:*** *if a client specifically requested a unit standard aligned course (very rarely) then we would have to start with the unit standard and develop materials based on each outcome. We state each outcome explicitly so that it is clearly visible to the client and diminishes any arguments about the materials being 'aligned'. We don't like doing it, as it compromises the quality of the course, but we have to if we want the contract.*

One of the concerns raised in the literature involves the role of knowledge when applied to a unit standard context. Evidence from the literature suggests that adherence to unit standards forces knowledge to serve the requirements of the outcome. Yet the discussions with most of the informal interviewees suggest otherwise, as these people commented that they designed the courses according to their own requirements and then ticked off the outcomes that could be inferred from their work. They would make notes of where the 'outcomes' were embedded in the course, but they tended not to compromise their course design to meet the requirements of the unit standard.

> ***Alice, informal interviewee:*** *For me, outcomes equal objectives. If I have to design a course that way, then I will decide what the objectives are of each outcome are and write materials accordingly.*

Like the formal interviews, most of the informal interviewees relied entirely on their intuition, experience or contact with contemporary literature to direct their selection of course content. Like the formal interviews, the informal interviewees did not design discipline-based courses, rather focusing on operational and procedural knowledge categories, while drawing on a mix of their disciplinary and declarative knowledge and their personal experience of workplace practice, to design their courses. The feeling among the interviewees was that 'simple' courses, namely courses that focus explicitly on operational or procedural functions, can be unit standards-based, but 'complex' courses cannot be translated into unit standards. In this respect the informal interviewees used the same arguments as the formal interviewees.

> ***Ruth, Informal Interviewee:*** *the work is basic at levels 1-4, so outcomes can be used. After level 4, there is too much abstract materials, it just does not lend itself to an outcomes approach.*

In conclusion, the informal interviews did not reveal information that was significantly dissimilar to the formal interviews with regards to the way that course writers select content. Many of the concerns raised in the formal interviews first emerged during the pilot

discussions with the informal interviewees. Alice quite succinctly summed up her feelings about unit standards from their initial introduction until the present.

> ***Alice, Informal Interviewee:*** *When unit standards first arrived, we were excited because we thought they would provide standardised guidelines for our course development. Now everyone just tries to work around them, we don't use them, nor do they offer any structure that is useful.*

## 4.6 Findings

The data analysis chapter examined the interviews of course designers working with unit standards. Their comments concerning their work were interpreted within the context of the literature. The main findings from the interviews are outlined here.

### 4.6.1 Finding One: Course designers struggle to use unit standards.

All the course designers interviewed had tried to use unit standards, and most agreed that they could not use these documents when meeting the training requirements of their respective organisations. The interviews reveal that attending an assessors' course provided the interviewees with some understanding of how to use these documents during the course design process. Despite the framing from that course, all three organisations at the time of the interviews were not using unit standards for course design, with the exception of their learnership programmes.

The interviews with the course designers confirmed the literature that argues that even though unit standards are a political attempt at transforming education, they do not make educational sense (Jansen, 1998; Allais, 2007). This is largely because unit standards are essentially complex, inaccessible and unrelated to organisational training objectives. Evidence from the interviews suggests that organisations do not use unit standards in any capacity other than in their learnerships.

Another reason for disregarding unit standards is pragmatic, namely that unit standards complicate organisational training and interfere with departmental training requirements. The interviewees agreed that they could not waste their resources training unit standards that didn't meet the organisations training needs. Outside of this programme, none of the organisations interviewed felt that unit standards offered their respective organisations a valuable training and development tool. The interviewees agreed that they cannot waste their resources training unit standards that don't meet the organisations' training needs.

### 4.6.2 Finding Two: Unit standards have some influence on the organisation and design of courses, but not the *way* content is selected.

The findings regarding the selection and organisation of knowledge indicate that unit standards had an influence on the way that some courses are organised and designed, however, the introduction of unit standards does not seem to have influenced the content selection process used by course designers. These two findings will be addressed in this section.

None of the course developers interviewed followed the same strategy regarding unit standards. Even though Evergreen had presented as the most 'compliant', even they had seriously examined their approach and had largely disregarded unit standards as the basis for course design. In cases where unit standards were used – usually the learnership component of the organisations' training load - the interviewees used different course design approaches. Evergreen, for example, had tried to follow a 'design down' method by beginning the design process by reading and identifying all the outcomes. Rolene, at Red Planet, would decide on how to assess the course and design her materials around the assessment. Evidence from the interviews suggests that Evergreen was the most compliant regarding the use of unit standards, while Red Planet and Blue House placed the company's needs above compliance to unit standards.

Evidence from the interviews suggests that unit standards appear to have influenced the way that course design is approached. For Evergreen and Red Planet, course design had been significantly influenced by unit standards as the knowledge selected was expected to meet the requirements of the outcomes. When outcomes are used, the evidence from the interviews indicates that knowledge is expected to serve the acquisition of the outcome. In this respect, knowledge, in and of itself, does not appear to have any intrinsic value except to serve the course requirements.

Regarding the selection of course content, the evidence from the interviews indicates that unit standards have had no real influence on the process of content selection. Personal experience and 'gut feel' play a central role in the content selection process. Also, a heavy reliance on Google as a search engine strongly influenced the website and content selection.

Absent from the data regarding course design or content selection was an awareness or emphasis on disciplinary knowledge. At most, the course developers addressed 'industry best practice', and Karen (Red Planet) addressed her personal concerns with regards to her ignorance in areas where she was expected to produce training materials.

Regarding the matter of course design and content selection, evidence from the interviews suggests that unit standards have complicated the course design process, and it appears that very little has changed regarding the selection of content.

### 4.6.3 Finding Three: Course designers use unit standards for learnership programmes because they emphasise social justice, not organisational business objectives.

Evidence from the formal interviews indicate that the course designers are reluctant to use unit standards for organisational training. This is because the focus of organisational training and development is to produce programmes necessary for smooth running of the organisation. Full time, permanent employees are employed with the expectation that they will meet the requirements of their job category. They receive training to ensure they meet their job requirement not necessarily to develop them as individuals, or to meet a social transformational objective. The interviewees argued that unit standards could not describe the training requirements in their respective organisations. Nor could unit standards meet the changing circumstances of business practice and for this reason, course developers had to rely on other ways of developing courses, namely in response to real-time training requests from the departments and divisions in the organisations.

However, a different picture emerged when they discussed their respective learnership programmes, where unit standards are used i with little resistance. Evidence from the interviews indicate that the course designers apply a different set of values to their learnerships in comparison to the values that underscore mainstream organisational course design and training. This is because the learnership programmes are designed as a year-long induction to business practice for unemployed and previously disadvantaged individuals. The essential objective of the programme is to expose the participants to unit standards based course content and to provide them with work experience.

The participants in the learnership programme were not expected to work at the same pace as regular employees, and their work performance was not evaluated according to the same standards and regular employees. This is because the learnership programme is perceived by the interviewees as an opportunity to introduce and guide the participants in organisational practice. However the permanent employees were expected to attend courses primarily to increase their on-the-job performance, and were expected to perform to the standards set by their departments.

Unlike hiring permanent staff, there is little financial risk involved in running learnerships (companies can approach the SETAs to claim back the expenditure on learnerships). Unit standards are used extensively in this context because there is no perceived urgency to produce training materials to meet specific organisational training objectives. Without this

urgency, the course designers could use unit standards as a basis for the learnership qualification. However, even though the unit standards are used in this context, the issues and concerns surrounding these documents remained a constant problem for the interviewees. Even though the confusion surrounding these documents followed the course developers into the learnership programmes, they did not experience the concerns or sense of urgency that overshadowed the used of these documents in mainstream course development. This is because the objectives and timelines involved in the course design was far looser, and certainly not linked to organisational performance objectives. The companies interviewed all talked positively and protectively about their learnerships, and were very aware of the social contribution that they were providing with this programme.

## 4.7 Conclusion

In conclusion, evidence from the research interviews and the literature suggest that unit standards may not be the best option for workplace-based training (Allais, 2007).

The evidence from the formal and informal interviews indicates that unit standards are not being used in the organisations interviewed, except in learnerships or in other specific qualifications that are not researched in this research report. The arguments raised by the interviewees against unit standards points towards the urgency of departments to meet their business objectives, objectives that are usually not expressed in generic unit standards. The interviews suggest that unit standards in their present form hold little relevance for the interviewees with regards to furthering the training needs of individuals in the organisation.

> ***Tina, Evergreen:*** *For these kinds of jobs (call centre, administration) work experience always trumps training.*
>
> ***Jim, Blue House:*** *Why qualify someone if all they need is a skill, or if they are not interested in a qualification.*

Jim could not agree with the introduction of unit standards for a host of workplace functions that did not require a qualification. Even the long term call centre employees at Red Planet realised their intrinsic worth as employees depended on their workplace performance and not on their time in the training room.

Regarding the use of unit standards, all the companies were somewhere on a continuum of high or low engagement with unit standards. Even Evergreen had arrived at a point where they realised that total compliance to unit standards was not serving their business model. Blue House and Red Planet only used unit standards for the learnership qualification. However they were all in agreement that the learnership and ABET qualifications offered by their companies met a necessary social obligation to the citizens of South Africa. All the

interviewees spoke with sincere concern and passion for the continuation of their learnership and ABET programmes.

> ***Rolene, Red Planet:*** *We know we are making a difference. Our learnership candidates would never have had a chance to get any tertiary education maybe not even a chance to work in a spaza shop. We employ at least 65% of each group. Those that don't stay have a better advantage, because they now have a years' work experience.*
>
> ***Jim, Blue House****: We normally keep all the people from our learnerships and ABET programmes. We plan to empower them, that's our company's contribution to developing the people of South Africa.*

Course designers' lack of enthusiasm for unit standards in mainstream organisational training is offset by their commitment to unit standards-based learnership programmes that represent an opportunity to participate in social justice and redress. This does not detract from the evidence in the literature and in the interviews that argues that unit standards are complex and inaccessible documents that do not contribute to organisational training and development.

Every organisation has its own organisational culture and specific set of business objectives that need to be met in order to ensure the smooth running of the company. The interviewees argue that unit standards do not meet the requirements for organisational training, as unit standards cannot predict shifts in business or economic conditions that warrant organisational transformation.

Even though unit standards are not used throughout the organisations interviewed, all the course developers interviewed in this research report have used unit standards and are still using them for some of their course development and training. For this reason, even though organisations hardly use these documents, the interviewees were still keen to talk about the problems they have with unit standards.

# 5 CONCLUSION AND RECOMMENDATIONS

This final chapter will summarise this research report and discuss some of the main findings. The summary will begin by introducing the research report. This chapter will begin with a brief summary of the research which will include the salient features of the methodology chapter, literature review and data findings. This chapter will argue that even though the research corroborates with the literature which argues that unit standards are difficult to access, the primary concern of course developers differs slightly from the literature. This is because the course designers interviewed argue that unit standards do not reflect the training and development needs and objectives of their respective organisations.

## 5.1 Summary of the research report

My personal concerns regarding the contribution of unit standards to organisational course development provided the motivation for this research research report. When unit standards first appeared along with the introduction of the NQF, I received them non-critically, with an open and receptive attitude. However after working on many unit standards-based courses, I tentatively revisited my initial enthusiasm. The questions and concerns that surfaced were eventually shaped into this research research report, with a specific focus on educational and knowledge concerns regarding unit standards.

The research problem raised in this research report addresses the claim that unit standards do not provide the best mechanism to structure organisational course development. The research question that structured this research asked one overarching question, namely,

> 'How do corporate or workplace-based course developers use and engage with unit standards especially when designing learning programmes?'

To address this question, three minor research questions were designed to address different facets of the main question. The first question addressed the origins of unit standards in South Africa, exploring why they were introduced and the various international and local influences that contributed to the introduction of unit standards on the NQF. The second question examined literature drawn primarily from the sociology of knowledge that focused on explaining from a theoretical perspective, why unit standards were problematic. The third minor research question helped structure the field work, by asking how course designers use and engage with unit standards.

A multiple case study was selected as the method for this research because the research required access to course developers working with unit standards. The way that workplace-based course developers used and engaged with unit standards was the core research

objective of this research report, and semi-structured interviews provided a means to discuss unit standards with people in different organisations, using the same questionnaire to focus the discussion. Because interviewees are part of a broader context, their opinions can be viewed as representative of that context (Blaxter, Hughes and Tight, 1996:61). The financial services industry was selected as the setting for the multiple case study for pragmatic reasons, because unit standards were widely used in this industry and because I had personal experience and access to people working in the industry.

The literature selected for this research report aimed at providing a context for unit standards by identifying the origins of these documents, and the motivation behind their introduction. The first part of the literature review therefore focuses on the local and international origins of standards-based education and South African unit standards-based qualifications and part-qualifications. The second part of the literature review introduces theories of knowledge that are used to frame the comments made by the formal and informal interviewees, from a theoretical perspective.

The literature review attempted to meet two research agendas, the first to provide information about unit standards, and secondly to source literature that could provide an education-focused response to unit standards and the status of knowledge. This literature was used to frame the interviews and as a mechanism for interpreting the data analysis.

The comments, issues and concerns raised during the formal and informal interviews provide a small but informative study on how unit standards are used by course designers working in the financial services industry in South Africa.

## 5.2 Summary of findings from the case studies

The data emerging from the interviews highlighted three main themes regarding unit standards. The first concerns issues regarding access to unit standards, and the second concerns the relevance of unit standards to the organisation, and the third focuses on the special attention that course designers pay to learnerships.

### 5.2.1 Access

There was a fair amount of consistency in the attitudes of the course designers interviewed for this research report, especially with regards to issues of accessing and understanding what unit standards are, what they are meant for, and how they are to be used.

Even though none of the interviewees had a clear understanding of the origins of unit standards, they all correctly assumed that their introduction had some link to apartheid and

that unit standards had some role to play in transformation. In this respect, all the interviewees recognised that unit standards are introduced to transform education, however none can elucidate further regarding just how unit standards are be linked to transformation.

None of the course designers interviewed could understand the documents at first glance. All of them commented that they required the input from an assessor's course to develop some understanding of unit standards. Access to unit standards was clearly linked to input from a third party, where organisations relied on 'being told' how to use unit standards.

Issues of access were further exacerbated by the language and design of unit standards. The course designers reported feeling confused and unsure of what they were expected to accomplish with these documents.

The problems raised by the interviewees regarding unit standards applied to the learnership programme as well, expect the course designers were more willing to overlook the problems. This is because the training objective did not focus on urgent business practices, but instead focused on upliftment,. Furthermore, the learnership programme, once completed resulted in a qualification and the organisations were entitled to claim back a substantial portion of the training costs from their SETA. Therefore organisations did not have to carry the financial risk of the learnership programme, while simultaneously being able to observe and develop potential new employees during the learnership year.

### 5.2.2 Unit Standards on the shelf

There was overwhelming evidence emerging from the interviews that all of the companies had shelved unit standards as a mechanism to drive workplace training and development. The justification for this includes most of the concerns regarding access, contextualising unit standards and an overall confusion regarding the interpretation and implementation of unit standards when designing courses.

From an educational perspective, concerns with access, interpretation and the role of knowledge, are reasons enough for not using unit standards as the main mechanism to drive course design. Yet the interviews indicate that the main reason organisations have largely shelved unit standards is a consequence of these documents impeding their business objectives. The course designers reported that unit standards do not speak to the organisations' business needs. They explained that much of their work involves ensuring that employees are able to perform functions that ensure the organisation remains competitive and viable.

The exception to this rule concerned the implementation and management of the respective learnership programmes, where the emphasis shifted towards developing the individuals and away from a focus on organisational business goals. Respondents from both Blue House and Red Planet were in agreement that the learnerships provide social currency for the organisation, as this is one way they can participate in providing formal employment to people who would ordinarily have had little chance of entering these organisations. All three organisations agree that the learnerships provide formally disadvantaged people with access to organisation. However, they all believe that the qualification does not have as much relevance as the work experience gained through a year's work in different departments.

With the exclusion of learnerships and ABET, unit standards appear to be largely ignored, shelved or sidestepped at two of the three companies interviewed. Evergreen, at the time of the interview, was in the process of moving away from unit standards based courses, as the programmes did not match the needs of the organisation.

Even though the interviewees were not in favour of unit standards, they did not speak against the idea of some kind of standard to guide their work. They spoke in favour of this concept, but not in its current form.

### 5.2.3 Learnerships and the pursuit of social justice

The course designers interviewed formally were willing to use unit standards for their learnership programmes. There are a number of reasons for this, and they will be summarised here.

From an educational perspective, course designers were more comfortable using unit standards in a learnership context than their core training functions because this programme operated with a different set of values and assumptions to the rest of their training and design functions. Most importantly, learnership candidates entered the programme to gain exposure to organisational practice. The objective of the year was to expose the participant to the explicit and implicit practices of the organisation, essentially equipping them with skills to increase their employability. For this reason, the sequencing and pacing of the learnership programmes did not have to match the specific (at times urgent) requirements of the organisation.

The formal interviewees spoke warmly about their learnership programmes, aware that this was their opportunity as individuals and as representatives of their organisations, to contribute to social justice and development. They were clear that learnerships provided an important mechanism to provide disadvantaged people with access to organisational

practice. For this reason they were far more patient with this group and they ran the programme with a different set of expectations.

### 5.2.4 Short summary

The notable attitude of course designers towards unit standards is negative. The course designers interviewed, had all tried to use unit standards during the process of course design and had for similar reasons, shelved unit standards. Essentially all the course designers agree that unit standards did not meet the business requirements of their organisations, and therefore the focus of unit standards-based course design primarily resides in the learnership camp.

What did emerge during the interviews was the clear interest that course developers had in some kind of national 'standard' towards which they could evaluate their own work. However, unit standards were not the mechanism to establish that standard.

## 5.3 Discussion

Unit standards are not pedagogic documents with roots in any educational theory or field (Wolf:1995), rather they are political and economic documents that are designed to effect social transformation and redress with regards to accessing qualifications (SAQA, NQF Overview, www.saqa.org.za). This is why unit standards appear to make political sense, yet are simultaneously criticised from an educational perspective. The political imperative to overhaul the injustices of apartheid education are at loggerheads with educational theory on the one hand and the operational objectives of organisations on the other.

The literature discussed in this research report has stated the case for why unit standards were introduced. At the heart of these arguments is the need to redress apartheid educational inequality, and this was stated both in the literature and in the interviews. However, during the interviews it became clear that course developers did not experience unit standards as documents that promoted access, mobility, portability and progression (DoL/DoE, 2002:65). Instead, their experience was closer to the detractors of unit standards, who have argued that unit standards are inaccessible, complex and vague (Berlach and O'Neill, 2008:50), difficult to understand (Umalusi, 2007:39) and increasingly include 'layers of specification' (Allais, 2007:22).

Without some kind of mediation, like an assessor's course, none of the interviewers would have been able to understand how to use these documents. This indicates that unit standards are not accessible documents, require mediation and are subject to multiple

interpretations (Berlach and O'Neill, 2008:50) and confirms that providers battle to understand how to use unit standards in course development (DoL/DoE, 2002:26).

Concerns around access remained a central theme in both the literature and the interviews. The literature discusses problems of access regarding the design and wording of unit standards (Allais, 2003:309). These design problems have consequently resulted in problems with the interpretation of unit standards. Essentially the literature argues that providers, due to problems with interpretation, use unit standards as a curriculum guide (Berlach and O'Neill, 2008:50). Evergreen seemed to be the only organisation that did attempt to write all its courses using unit standards, and they commented during the interviews that they battled to integrate organisational needs with the stated outcomes. They, like Red Planet and Blue House, have also moved away from unit standards as a means to guide organisational course design.

The move away from unit standards is largely linked to course developers not being able to integrate unit standards with organisational objectives. The problems that emerged during the discussions suggest that the kinds of knowledge that need to be communicated in training is not reflected in unit standards. The organisations interviewed for this research report focus on courses that generally require procedural and functional knowledge (Biggs, 1999:42) which are processes necessary for organisational development. The literature suggests that most unit standards focus on these two knowledge categories. This is largely a consequence of OBE, that insists on a behavioural, measurable assessments that focus on what a person 'can do' and not on underpinning knowledge (SAQA, NQF Overview). However, functions and procedures differ between organisations which explains why the unit standards acquired in one organisation are not recognised by others.

In conclusion, the problems highlighted in this research report largely concern a conflict of interest between the political objectives of SAQA to open up access to qualifications, the practical objectives of organisational training and development, and the arguments of educational experts and theorists that demonstrate why unit standards are pedagogically unsound.

## 5.4 Evaluation of the Research

This research began with an explicit goal, to investigate how course designers used and engaged with unit standards. The methodology was selected through defining the scope and constraints of the research research report. The selection of the literature was difficult because unit standards do not belong to any theoretical school or model. Rob Moore's 'Education and Society' provided invaluable assistance as foundational literature regarding the treatment of knowledge within a framework of the sociology of knowledge.

The interviews were surprisingly easy to organise, as all the organisations contacted were interested in participating in an interview focusing on unit standards. Everyone had some opinion on the topic, which indicates that unit standards have had sufficient influence on training and development to prompt discussion about their role in organisations. However, caution should be exercised when extrapolating to the greater community of organisational course developers.

In my opinion, the interviews went well, but I was concerned that Amy (Evergreen) did not speak her mind because she was sitting in the interview with her manager. I did not get the impression that Karen or Rolene were inhibiting the flow of conversation, but it is possible that the data arising out of five private interviews would have been more critical of unit standards.

Even though I lean toward the side that argues against unit standards, this research has made me aware that the NQF, SAQA and unit standards have successfully established a particular awareness towards qualifications that may not be reversible. I am more aware now than before that course developers welcome some kind of national or industry standard.

The research objectives of the research report have been accomplished, namely to investigate how course developers use and engage with unit standards. The expectation when planning the research was that the interviews would yield sufficient data to use in conjunction with the selected literature. It emerged quite early in the research that most of the course designers did not use unit standards when designing courses. The discussions about unit standards were therefore based on the experiences that turned course designers away from using them during the course design process.

## 5.5 Limitations of the Research

The size of the interview sample is very small and therefore cannot be regarded as representative of the community of organisational course developers. However, the personal reflections and insights of the interviewees have provided data on how individuals engage with unit standards when designing occupationally specific learning material and therefore the research is valid in and of itself. It is my belief that had all the participants been interviewed alone, the discussions may have yielded even more detailed analysis. This limitation was offset by the consistency of comments between the organisations.

Regarding the literature, there are also some noteworthy and obvious limitations. The aim of this research report was to give a broad overview of unit standards. To trace their international and local origins and to investigate the literature that substantiates or

criticises unit standards. **Furthermore, because** education is the main focus of this research report, educational theories that present an alternative viewpoint were investigated. This research research report's limitation is that the door is wide open when identifying theories that explain why unit standards are not workable from an educational or pedagogic perspective. Almost all educational or pedagogic theories could be used to criticise unit standards, with perhaps the exclusion of some kinds of behavioural theory. Essentially, unit standards are not educational documents, and therefore the little discussion in this research report resonating from educational sources represents just the tip of a rather large conceptual and theoretical iceberg that is in serious need of being attended to.

Even though there are limitations in the literature, it is hoped that this research report has helped identify some sound theoretical and practical concerns with unit standards.

## 5.6 Recommendations and Suggestions for Further Research

Arising out of this study, further research is recommended in the following areas:

1. Investigative research into the use of unit standards in other industry sectors in South Africa would help develop some understanding of how organisations have responded to the mass introduction of OBE.

2. A close comparative study between two or more course developers regarding the reading and interpretation of unit standards would provide information on the various interpretations ascribed to the wording of unit standards.

3. All three interviews suggest that the course developers welcome some kind of industry-wide training standard. Therefore research into alternatives to unit standards as a standardisation mechanism is suggested.

## 5.7 Conclusion

The aim of this research report was not to judge the success of the NQF, as this has been addressed by theorists like Allais (2007) but rather to investigate how the policies of SAQA and the NQF are experienced by ordinary South Africans who are expected to engage with unit standards as part of their work function.

The key contribution of this research indicates that the companies interviewed are not using unit standards in the course development process. They are largely ignored or overlooked by course developers who are under pressure to develop courses that track rapid changes to knowledge, policies and procedures within the organisation. Evidence from the interviews

and the literature suggests that unit standards may not be the best option for workplace-based training and that alternatives to workplace-based qualifications require investigation.

The knowledge criteria discussed by the interviewees in this research report primarily focused on operational and procedural knowledge functions linked to workplace practice. In this respect, employees require the necessary disciplinary, declarative or professional knowledge to effectively inform workplace practice. This kind of knowledge is generally obtained from other sources, or accessed through in-house training and development programmes.

In conclusion, this research set out to explore the way that course developers use and engage with unit standards. To accomplish this, literature that focused on unit standards and the organisation of knowledge was investigated. The interviews, when analysed against the literature, present a picture of how unit standards have been received and managed in the workplace. The evidence gathered from the research suggests that companies embrace the concept of industrial standards, but unit standards do not seem to provide a reliable or trusted framework.

It is interesting to note that while SAQA defends its position and educational experts argue against unit standards, organisations have quietly voted with their feet. None of the course developers interviewed were expected to articulate in theoretical terms why unit standards were problematic, yet their intuitive experience with these instruments indicate they did not meet their training objectives. In essence, unit standards do not speak to the expectations that course designers draw on when developing courses. If anything, these documents confuse and complicate the process.

During the interview with Jim, he succinctly summarised the role that unit standards play in the minds of organisational course developers,

> 'We had a meeting with a few other organisations to throw some ideas around about organisational training. We were together for a whole day, we talked about industrial theatre, HIV/AIDS, how our learnerships were performing...but not once, during a day's open discussion, did anyone mention unit standards. Not once.'

Perhaps this is the most telling comment of all.

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# 7 APPENDIX

## 7.1 The Questionnaire

**Demographic questions**

Age

Education

Number of years in workplace training and development.

**Qualitative Questions**

Question 1: How do you approach the task of writing unit standard-based training materials?

Question 2: How do you decide what information to put into your training materials?

Question 3: Explain how unit standards help you in developing courses and in selecting materials for the course. Discuss the positives and negatives about unit standards.

Question 4: Does using unit standards cause you any problems when developing training materials?

Question 5: Is there a difference in how you developed courses prior to the introduction to unit standards? Can you explain and highlight these differences.

Question 6: How would you describe the transmission practices of your company's training and development? How do you think that people learn the material?

Question 7: What are the reasons behind the introduction of unit standards in South Africa?

Question 8: What do you understand regarding the language and terms used in OBE?

Question 9: Can you explain the origins of unit standards?

Question 10: How have unit standards been received by your team/ employees/ course participants?

Question 11: What are your predictions for workplace based training and development over the next five years?

## 7.2 An Example of a Unit Standard



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**SOUTH AFRICAN QUALIFICATIONS AUTHORITY**

**REGISTERED UNIT STANDARD THAT HAS PASSED THE END DATE:**

**Apply problem-solving techniques to make a decision or solve a problem in a real life context**

| SAQA US ID | UNIT STANDARD TITLE |
|---|---|
| 114952 | Apply problem-solving techniques to make a decision or solve a problem in a real life context |

| ORIGINATOR | REGISTERING PROVIDER |
|---|---|
| SGB Life Skills | |

| QUALITY ASSURING BODY |
|---|
| - |

| FIELD | SUBFIELD |
|---|---|
| Field 07 - Human and Social Studies | People/Human-Centred Development |

| ABET BAND | UNIT STANDARD TYPE | OLD NQF LEVEL | NEW NQF LEVEL | CREDITS |
|---|---|---|---|---|
| Undefined | Regular-Fundamental | Level 3 | NQF Level 03 | 2 |

| REGISTRATION STATUS | REGISTRATION START DATE | REGISTRATION END DATE | SAQA DECISION NUMBER |
|---|---|---|---|
| Passed the End Date - Status was "Reregistered" | 2007-06-26 | 2007-08-16 | SAQA 0160/05 |

| LAST DATE FOR ENROLMENT | LAST DATE FOR ACHIEVEMENT |
|---|---|
| 2008-08-16 | 2011-08-16 |

*In all of the tables in this document, both the old and the new NQF Levels are shown. In the text (purpose statements, qualification rules, etc), any reference to NQF Levels are to the old levels unless specifically stated otherwise.*

This unit standard is replaced by:

| US ID | Unit Standard Title | Old NQF Level | New NQF Level | Credits | Replacement Status |
|---|---|---|---|---|---|
| 244611 | Apply problem-solving techniques to make a decision or solve a problem in a real life | Level 3 | NQF Level 03 | 2 | Complete |

| | | | | | |
|---|---|---|---|---|---|
| | context | | | | |

**PURPOSE OF THE UNIT STANDARD**

In this unit standard learners should acquire basic problem solving skills and be able to use those skills in dealing with problems or making decisions in their own lives. The focus is on authentic situations that may require a decision or be a problem for the learner.

The qualifying learner is capable of

- Distinguishing between problems, challenges and matters requiring a decision.
- Investigating techniques for solving problems and making decisions.
- Identifying a problem in a real life situation.
- Applying a problem solving process or technique to propose a solution or make a decision.

**LEARNING ASSUMED TO BE IN PLACE AND RECOGNITION OF PRIOR LEARNING**

It is assumed that learners are competent in Communication at NQF level 2.

**UNIT STANDARD RANGE**

The typical scope of this unit standard is
- Real life problems in the learner's own context

## Specific Outcomes and Assessment Criteria:

**SPECIFIC OUTCOME 1**

Distinguish between problems, challenges and matters requiring a decision.

**ASSESSMENT CRITERIA**

**ASSESSMENT CRITERION 1**

The concept of a problem is explained with examples.

**ASSESSMENT CRITERION 2**

The concept of a challenge is explained with examples.

**ASSESSMENT CRITERION 3**

The difference between a problem, challenge and a matter requiring a decision is discussed with reference to real life examples and experiences.

**ASSESSMENT CRITERION 4**

The impact of own attitude on problems and challenges is discussed and an indication is given of how own attitude can help or hinder solutions.

**SPECIFIC OUTCOME 2**

Investigate techniques for solving problems and making decisions.

**ASSESSMENT CRITERIA**

**ASSESSMENT CRITERION 1**

The role of brainstorming in problem solving and decision-making is explored and an indication is given of the power of group decision-making.

**ASSESSMENT CRITERION 2**

Different techniques for solving problems or making decisions are explored and an indication is given of when each is appropriate.

**ASSESSMENT CRITERION RANGE**

Includes, but is not limited to, lateral and creative thinking, scenario planning, de Bono's thinking hats and problem solving shoes, analytical or risk management type processes, scientific research type process.

**SPECIFIC OUTCOME 3**

Identify a problem in a real life context.

**ASSESSMENT CRITERIA**

**ASSESSMENT CRITERION 1**

A real life situation or issue is identified and described and an indication is given of the source/origin and extent of the problem.

**ASSESSMENT CRITERION 2**

The identified problem is analysed to determine the actual problem.

**SPECIFIC OUTCOME 4**

Apply a problem solving process or technique to propose a possible solution or make a decision.

**ASSESSMENT CRITERIA**

**ASSESSMENT CRITERION 1**

Information relating to the problem is gathered to inform the decision-making process.

**ASSESSMENT CRITERION 2**

A problem solving technique or process is applied to identify potential solutions.

**ASSESSMENT CRITERION 3**

Potential solutions are compared and a decision is made as to which is the most appropriate in a specific situation.

**UNIT STANDARD ACCREDITATION AND MODERATION OPTIONS**

Assessment of this Unit Standard should be contextual, practical and be conducted in the workplace as far as possible.

- Assessors must be registered as assessors with the relevant ETQA.
- Moderators must be registered as assessors with the relevant ETQA, or with an ETQA that has a Memorandum of Understanding with the relevant ETQA

# Critical Cross-field Outcomes (CCFO):

**UNIT STANDARD CCFO IDENTIFYING**

The learner is able to identify and solve problems and make decisions in applying a problem solving process to propose a possible solution and make a decision.

**UNIT STANDARD CCFO WORKING**

The learner is able to work as a member of a team in exploring group decision-making processes.

**UNIT STANDARD CCFO ORGANISING**

The learner is able to organise and manage him/herself in proposing a possible solution to a real life problem in own context.

**UNIT STANDARD CCFO COLLECTING**

The learner is able to collect, organise and critically evaluate information to inform the decision-making process.

**UNIT STANDARD CCFO COMMUNICATING**

The learner is able to communicate effectively in brainstorming and engaging in group decision-making.

**QUALIFICATIONS UTILISING THIS UNIT STANDARD:**

| | ID | QUALIFICATION TITLE | OLD LEVEL | NEW LEVEL | STATUS | END DATE |
|---|---|---|---|---|---|---|
| Core | 49013 | National Certificate: Mining Operations: Underground Hard Rock | Level 2 | NQF Level 02 | Passed the End Date - Status was "Reregistered" | 2007-08-16 |
| Core | 49772 | National Certificate: Archaeology | Level 3 | NQF Level 03 | Reregistered | 2011-10-20 |
| Core | 57877 | National Certificate: CNC Production Machining | Level 3 | NQF Level 03 | Passed the End Date - Status was "Registered" | 2010-02-08 |
| Core | 49128 | National Certificate: Community Health Work | Level 3 | NQF Level 03 | Passed the End Date - Status was "Reregistered" | 2009-04-08 |
| Core | 49089 | National Certificate: Financial Services | Level 3 | NQF Level 03 | Reregistered | 2010-11-20 |
| Core | 57694 | National Certificate: Food and Beverage Packaging Operations | Level 3 | NQF Level 03 | Reregistered | 2012-01-27 |
| Core | 49596 | National Certificate: Radiation Monitoring | Level 3 | NQF Level 03 | Reregistered | 2011-06-24 |
| Core | 49688 | National Certificate: Victim Empowerment | Level 3 | NQF Level 03 | Reregistered | 2011-08-05 |
| Core | 49127 | Further Education and Training Certificate: Design Foundation | Level 4 | NQF Level 04 | Reregistered | 2010-08-07 |
| Fundamental | 57879 | National Certificate: Manufacturing of Surface Coatings | Level 3 | NQF Level 03 | Passed the End Date - Status was "Registered" | 2010-02-21 |
| Elective | 48783 | National Certificate: Financial Services | Level 2 | NQF Level 02 | Reregistered | 2010-07-17 |
| Elective | 50308 | National Certificate: Bread and Flour Confectionery Baking | Level 3 | NQF Level 03 | Reregistered | 2012-09-01 |
| Elective | 49752 | National Certificate: Environmental Practice | Level 3 | NQF Level 03 | Reregistered | 2011-09-30 |
| Elective | 57880 | National Certificate: Meat Processing | Level 3 | NQF Level 03 | Registered | 2011-03-12 |
| Elective | 49529 | Further Education and Training Certificate: Long-Term Risk | Level 4 | NQF Level 04 | Reregistered | 2011-11-18 |

| | | | | | | |
|---|---|---|---|---|---|---|
| | | Assessment | | | | |
| Elective | 49356 | Further Education and Training Certificate: Medical Claims Assessing | Level 4 | NQF Level 04 | Reregistered | 2011-02-26 |
| Elective | 66609 | Further Education and Training Certificate: Retail Insurance | Level 4 | NQF Level 04 | Reregistered | 2011-11-18 |
| Elective | 66610 | Further Education and Training Certificate: Short Term Insurance | Level 4 | NQF Level 04 | Reregistered | 2012-01-27 |
| Elective | 57613 | Further Education and Training Certificate: Short-Term Risk Management | Level 4 | NQF Level 04 | Reregistered | 2012-11-03 |

**PROVIDERS CURRENTLY ACCREDITED TO OFFER THIS UNIT STANDARD:**

*This information shows the current accreditations (i.e. those not past their accreditation end dates), and is the most complete record available to SAQA as of today. Some Quality Assuring Bodies have a lag in their recording systems for provider accreditation, in turn leading to a lag in notifying SAQA of all the providers that they have accredited to offer qualifications and unit standards, as well as any extensions to accreditation end dates. The relevant Quality Assuring Body should be notified if a record appears to be missing from here.*

1. African Divas
2. Alcari 233
3. ALCARI 233 CC T/A ALCARI (Eversdal)(TP)
4. CHAMELEON PERFORMANCE IMPROVERS CC
5. CKP Development Agency cc
6. Coca Cola Fortune (Pty) Ltd Port Shepstone
7. College of Cape Town (City Campus)
8. Concept Interactive
9. Direct Axis
10. ICANDO
11. Integrated Waste and Recycling Services
12. Invuya Training College
13. Masifunde Training Centre
14. MP Academy CC
15. Nouveau Consulting
16. PSG Konsult Limited
17. Ronald Sewells & Associates S.A. (PTY) Ltd
18. SAB - Newlands
19. SAB - Rosslyn
20. SAB - Training Institute

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