

**AN EVALUATION OF TOURISM TRAINING: A CONCEPTUAL ANALYSIS**

**By**

**Labeeqah Schuurman**

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**Supervisor: Professor MS Bayat**

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**In this life I walk with the light of all that is spiritual. It is with this in mind that I dedicate this work to my late mother, my father, my sisters and my two boys. They bring balance to my life and together with my Spiritual Mentor, I know that the path is clear.**

**I hereby wish to state that the research as outlined is of my own undertaking.**

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**L Schuurman**

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**Date**

**I wish to acknowledge and thank my supervisor and mentor, Professor MS Bayat, for his continued guidance, assistance and support - the unfailing mentoring and evaluation of all my work has led to greater things.**

## ABSTRACT

The research is aimed at achieving a conceptual analysis of tourism training. Training initiatives in the Western Cape province are frequently mentioned by way of example, while the respective roles of tertiary institutions, the future Cape Peninsula University of Technology and the Sector Education and Training Authority for the Tourism, Hospitality and Sport Education and Training Authority (THETA) are extensively explored in the research.

An investigation is undertaken to determine the gaps between the output of the tourism education and training system and the real demand of tourism employers.

The research report will delineate the issues that need to be covered in the research study to determine the gaps between the output of the tourism education and training system and the real demand of tourism employers.

A pilot study, commissioned by the World Tourism Organisation (WTO), reveal gaps in tourism training worldwide, especially in the occupational category of front-line workers. In this category, the most common gaps relate to interpersonal communication skills, languages, computing and elementary knowledge of business techniques.

The conclusions of the pilot study are noted and explained by pointing out the need to incorporate the changes in education regarding learnerships, skills programmes and work-based qualifications, as set out by the Tourism, Hospitality and Sport Education and Training Authority (THETA) for the tourism industry. The research proceed to

highlight the role of other major stakeholders, for example, that of the Department of Environmental Affairs and Tourism (DEAT) with the view that tourism must be understood in a global, national and provincial context.

The study is concluded by proposing the way forward for higher education and the future role of the Cape Technikon, soon to merge with Peninsula Technikon to form the Cape Peninsula University of Technology.

A number of recommendations are proposed in the study, examples of which are the following:

The design of curricular content have to match up to the different expectations in the demand for tourism education systems.

The tourism education and training needs of an education system have to be thoroughly analysed. This analysis is necessary for any education system that aims to offer quality and have a chance for success.

Utilisation of the Total Quality Methodology concept in order to meet the totality of consumer expectations by the complete elimination of the gaps that exist between expectations or needs and perceptions. The word total implies that the concept of quality has a global significance, which is transmitted to the internal level of the organisation concerned.

For educators, learners should be regarded as customers in their search for knowledge, which will result in learners, who are the suppliers of acquired skills, utilising such skills in the tourism industry, to the benefit of the employer, the tourist and the industry as a whole.

Total Quality, based on the premise that gaps can be avoided before they are produced, by placing the emphasis on prevention and the establishment of systems, will largely eliminate the possibility of error. This is the concept of right first time. To achieve this, the consumers' expectations or needs must be studied and the critical factors, which affect their ultimate perception of quality be identified. This involves undertaking regular and systematic research, and getting answers directly from the user concerned.

The training supply must be adapted to the transferable intellectual abilities, personal attitudes and interpersonal relations tourism businesses are demanding. Rather than bridging the existing gaps between jobs and training by greater specialisation and ad hoc responses, it would seem more sensible to consolidate those types of training that endow future professionals with the basic capacities that will make them employable.

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## CHAPTER 1

### GENERAL INTRODUCTION AND BACKGROUND TO THE PROSPECTIVE STUDY

#### 1.1 INTRODUCTORY REMARKS

The World Tourism Organisation (WTO) commissioned a pilot study, which was conducted by the George Washington University, on training needs in different regions of the world. The pilot study looked at a world map comprising 12 sectors of tourism activity, 4 professional levels and 6 world regions (which coincided with the territorial demarcations in which the WTO is active). WTO developed the TEDQUAL (Tourism Education Quality Methodology) to provide a form of voluntary standardisation for dealing with quality issues in tourism and education. The aim of the pilot study was to detect the existing gaps between the needs or expectations of educational curricula, establishments and systems. (WTO, 1997)

The research will show that the TEDQUAL and Delphi methodological measuring instruments, as used by the World Tourism Organisation (WTO), can be applied in *identifying and developing a training needs analysis of the tourism industry.*

The study of determining the gaps between the output of the tourism education and training system and the real demand of tourism employers will be shown to incorporate the same basic principles as the pilot study commissioned by WTO.

The purpose of this research is to undertake an investigation into determining the gaps between the output of the tourism education and training system and the real demand

of tourism employers. The investigation is a motivation for the necessary research (hereafter, referred to as the research study), which needs to be undertaken to determine the gaps and the training needs for the tourism industry.

The report will delineate the issues that need to be covered in the research study to determine the gaps between the output of the tourism education and training system and the real demand of tourism employers.

The specific conclusions of the pilot study, commissioned by the World Tourism Organisation, reveal gaps in tourism training worldwide, especially in the occupational category of front-line workers. In this category, the most common gaps relate to interpersonal communication skills, languages, computing and elementary knowledge of business techniques. At the other end of the scale, the major gaps revealed in high-level management include strategic planning and marketing skills. (WTO, 1997)

The research emphasises the conclusions of the pilot study by pointing out the need to incorporate the changes in education regarding learnerships, skills programmes and work-based qualifications, as set out by the Tourism, Hospitality and Sport Education and Training Authority (hereafter mentioned as THETA) for the tourism industry. The research proceeds to highlight the role of other major stakeholders, for example, that of the Department of Environmental Affairs and Tourism (DEAT) with the view that tourism must be understood in a global, national and provincial context.

The research concludes by proposing the way forward for higher education (an example) and the suggested role of the Cape Technikon, including an elucidation of its current tourism programmes.

Fletcher and Latham (1989) focus on the growth and development of the tourism industry and the resulting requirement for improvements in tourism education, particularly in the Third World. Also, Fletcher and Latham (1989) offer a detailed example of a general and wide-ranging programme of tourism studies, which may be considered appropriate in the context of tourism education in a developing country, together with an evaluation of this programme.

Howell and Uysal (1987) identify a number of the problems and issues that confront educators involved in planning curricula for tourism education in developing countries. Howell and Uysal (1987) call for a more sensitive approach in all areas of tourism education to reflect the individual situation, while maximising benefits of tourism to all concerned, especially the host community.

Theuns and Rasheed (1983) discuss tourism education in developing countries. The article offers an interesting examination of contrasting approaches to tourism education: the demand- and supply-orientated approaches. The authors highlight the enormous irregularities in the provision of tourism education at all levels in terms of the duration, content, institutional status and affiliation of courses, which make systemised evaluation of provision extremely difficult.

Theuns and Rasheed (1983) offer their own views with regard to the most appropriate way to approach tourism education in developing countries.

The World Tourism Organisation (1997) provides a TEDQUAL Methodological Model for analysing training needs at a destination. The TEDQUAL Model will be used in PHASE 1 of the research study.

The Tourism Human Resources Strategic Framework will support the growth Tourism Sector, with specific focus on the empowerment of previously disadvantaged groups.

The results of the research study will contribute to the development of an integrated and holistic Tourism Human Resources Strategic Framework, which emphasises the needs of the public sector, the private sector, the industry and communities.

The investigation points to a research study, which will be the first of its kind in a Sectoral Needs Training and Development analysis of the tourism industry .

The World Tourism Organisation (WTO) conducted a pilot study on Tourism Training Needs in Different World Regions. It commissioned a study from the George Washington University on current and future education and training needs in the tourism industry in different world regions. The study was based on the identification of the qualitative gaps that exist between the supply and demand for tourism training, which is a prerequisite for a competitive tourism education system.

The objective of the pilot study was to identify education and training needs in the tourism industry worldwide, and to determine the quality gaps between existing tourism training initiatives and the demand for these in the world's different tourism regions, specific sectors and professionals levels.

The specific aims of the pilot study were:

To create a map of tourism professions worldwide, as a reference framework in which to locate the quality gaps in tourism education and training, specifying the particular

needs of different sectors, professional levels and geographical regions.

Given that tourism is a dynamic sector, to determine the education and training needs in tourism envisaged in the future, through surveys, based on the Delphi method. To specify the most efficient education procedures for the different tourism sectors and professional levels present in the different tourism regions worldwide (WTO, 1997:43-44)

The aim of the research study is to determine the education and training needs of the tourism industry and to determine the quality gaps between existing tourism education and training.

The research study will utilise the 12 sub-sectors of tourism activity and the professional levels, as defined by WTO's pilot study. However, the research study will incorporate the 8 geographical areas that specifically make up the Western Cape.

The research study will adapt the TEDQUAL methodology, which identifies training gaps by looking at a panel of experts; and gain community input by making use of participatory action research.

The research places an emphasis on determining the gaps between the output of the tourism education and training system and the real demand of tourism employers.

Applying the TEDQUAL and Delphi methods to establish the training needs, as identified by tourism employers in the tourism industry will achieve this objective.

However, it is believed that the results of the TEDQUAL and Delphi methodology could be combined with Participatory Action Research (PAR).



PAR is a commonly used approach to "grassroots development" interventions and is encountered especially in the underprivileged rural settings in the Third World countries. Here, it has emerged as part of the research to render development assistance more responsive to the needs and opinions of local people. Given the large number of South Africans living in "Third World" conditions, PAR has special relevance to researchers working in South Africa.

PAR means that participation by members of the subject of the study must be integrated in the research by participating fully and actively in the research process, from its outset and throughout most, or all, of its phases. PAR is a cyclical, reflective process and includes involvement of the participants at all stages of the research process.

In bringing about social change, the researcher is dependent on the participation of the affected community members and the public sector.

PAR is deemed necessary account for the emerging Small, Medium and Micro Enterprises (SMMEs) and the large informal sector of the tourism industry in identifying the training needs of the tourism industry.

The WTO's Tourism Education and Training Plan defines its mission as being the "attainment of quality in tourism education and training, in response to the needs of the industry's future professionals, employers and member states".

The aims of the WTO plan are:

- ✧ the on-going detection of the human resource needs of tourism industry employers;
- ✧ the definition of quality standards in tourism education and training, applicable on a global scale and in tourism regions worldwide; and
- ✧ the strengthening of the human resources needed by national tourist authorities and the tourist industries they manage (tourism education systems, training courses, etc.); as well as the definition of tourism training programmes, which abide by the quality standards set and which respond to the needs of future professionals and tourism employers.

The above aims reveal the WTO's desire to take on an active role in the task of constructing competitive systems of tourism education and training, in partnership with other players: employers in the tourism industry, education providers, the recipients of education and training themselves and public authorities responsible for tourism.

WTO has developed the TEDQUAL methodology in this context. The ultimate aim of TEDQUAL is to detect the education and training needs of the tourism industry by means of a Total Quality approach, which will enable the size of the existing gaps between training demand - present and foreseeable - and supply to be determined and the actions required to be prioritised. (WTO, 1997:13-14)

The question is asked whether there are gaps between the output of the tourism education and training system and the real demand of tourism employers?

Clarity is needed with regard to the gaps between the output of the tourism education and training system and the real demand of tourism employers.

Although there are extraneous variables operating in this context, it is possible that there are gaps between the output of the tourism education and training system and the real demand of tourism employers.

The research study will determine the gaps between the output of the tourism education and training system and the real demand of tourism employers . Also, during the research, data will be collected, which will be used to develop a Tourism Human Resources Strategic Framework.

To determine the gaps between the output of the tourism education and training system and the real demand of tourism employers.

There are gaps between the output of the tourism education and training system and the real demand of tourism employers.

In order to assess the validity of the above hypotheses, the following equation is formulated:

- ✿ If output of tourism education and training systems is (H) then real demand of tourism employers is (H).

- ✧ If output of tourism education and training systems is (L) then real demand of tourism employers is (L).
- ✧ A null hypothesis to the following effect can be formulated: There are no statistically significant gaps between the output of the tourism education and training system and the real demand of tourism employers.

Dependent variable (Y) is real demand by tourism employers.

Independent variable (X) is output of tourism education and training systems

The research study is designed to be qualitative, rather than quantitative, in its aim embark on a conceptual analysis of tourism training for tourism employees. Because of the subject nature of the material to be worked on, TEDQUAL qualitative methods are the most appropriate in obtaining data, which would be adequate and sufficiently in-depth to enable an objective analysis to be made. The qualitative Delphi methodology covers the specific aims of the research study.

According to Salkind (2000:10 - 11), non-experimental research includes a variety of different methods that describe relationships between variables. Included in such methods is the descriptive / historical research method, which describes the characteristics of existing and past phenomena.

Historical research, according to Salkind (2000:12), relates past events to each other and/or to current events. Historical research answers a question regarding the nature and extent of events that took place in the past. Researchers often accomplish historical research through the use of primary sources such as original documents and

first-hand information as well as secondary sources that may originate from second-hand sources.

Salkind (2000:11) stresses that not only can descriptive and historical research stand on their own, but it can serve as bases for other types of research in that a group's characteristics often can be described from a descriptive / historical point of view in order to arrive at acceptable theoretical perspectives.

(Leedy, 1980:3-9) is critical of those academics who display a prejudice for a given research methodology and states that it is difficult to defend the position of those who claim that unless research fits an arbitrary prejudice for a given methodology, it fails to be research. All highways are of equal excellence; each, however, traverses a different terrain, but they all converge on the same destination. In other words, when research is viewed as an offensive against ignorance of the truth, then the four principal research methodologies are merely separate avenues leading in the direction of enlightenment. No one methodology is superior to any other, and they all converge at one coveted point: the point from which we are able to discern that of which we were hitherto unaware.

According to Salkind (2000:188), the descriptive / historical researcher proceed in terms of particular steps, which correspond closely to those of other types of research.

The steps are as follows:

- ✧ First, the historical researchers define a topic or a problem that they wish to investigate, in this instance, the ethical foundations of service quality in tourism and hospitality management: a theoretical perspective.

- ✧ Second, the researcher formulates an hypothesis(es), which is expressed as a question, or set of questions.
- ✧ Third, the researcher sets out to utilise a variety of sources to gather data. Salkind (2000: 188) emphasises that while these sources may differ markedly from those in other research methodologies, the analysis of written documents are usually the domain of the historical researcher.
- ✧ Fourth, the evidence gathered needs to be evaluated both for its authenticity as well as for its accuracy. The researcher therefore needs to establish the value of the data from primary as well as secondary sources that underlie the salient arguments of the research. This requirement is concomitant to the researcher developing a critical and evaluative attitude towards the collected information. Salkind (2000:191) holds that the evaluation of primary and secondary data is accomplished through the application of two separate criteria: authenticity (external criticism) and accuracy (internal criticism).

## 1.2 SUMMARY

In light of the foregoing, the research methodology for this research will be of a descriptive/historical nature which will focus on a theory search and literature review and which will entail examining of existing primary and secondary literary sources, followed by particular recommendations.

The following chapter will explore tourism education and training in South Africa in general and in the Western Cape in particular.

## CHAPTER 2

### TOURISM EDUCATION AND TRAINING

#### 2.1 INTRODUCTION

A number of definitions of tourism exist. For the purpose of the research, the definition by Mathieson and Wall (1982) seems the most appropriate. Mathieson and Wall (1982) state that tourism activity relates to:

'the temporary movement to destinations outside the normal home and workplace, the activities undertaken during the stay and the facilities created to cater for the needs of the tourist. (WTO, 1996)

The above definition is appropriate for the research, as it conveys the essential elements of tourist activity, namely: tourism arises out of a movement of people to, and their stay in, various destinations.

According to Bennett (2000:4-5), there are usually two elements in tourism - the journey to the destination and the stay at the destination. (including activities undertaken there).

The journey and the stay take place outside the normal place of residence and work, so that tourism gives rise to activities that are distinct from the resident and working populations of the places through and in which they travel and stay.

The movement to destinations is temporary and short-term in character - the intention is to return home within a few days, weeks or months; and destinations are visited for purposes other than taking up permanent residence or employment.

Also, it is important to include domestic and international tourists in the definition of tourism. (Bennett, 2000:4-5)

Domestic tourists are defined as domestic visitors staying for at least 24 hours, but not for more than one year, in the place visited. The purpose of the trip can be classified under one of the following headings: pleasure, recreation, holiday and sport; or business, visiting friends and relatives (VFR), missionary work, meetings, conferences, health, studies and religion.

International tourists are international visitors staying for at least 24 hours, but not for more than one year in the country visited. The purpose of such a visit can be classified under one of the following headings: pleasure, recreation, holiday and sport; or business, visiting friends and relatives (VFR), missionary work, meetings, conferences, health, studies and religion.

Tourism models highlight the importance of consumer behaviour, transport, communication and planning. For example, the tourism system according to Gunn, 1988, reflects a market-orientated view of the tourism system, where the determining factor is consumer behaviour (Bennett, 2001:39).



## 2.2 TOURISM EDUCATION AND TRAINING

The following definitions place the tourism industry in context: tourism; international and domestic tourists; and elements of the tourism system and the relationship between them.

However, tourism definitions emphasise the demand-side of tourism activity, rather than the supply-side. This can be attributed to the fact that it is difficult to differentiate which tourism-related industries are serving tourists only, and which are serving local residents and other markets in addition to tourists.

The Department of Labour (DoL) facilitates the provision of training for employed and unemployed and acknowledges that there has been a downward trend in the numbers being trained in recent years. This is mainly due to:

- ✧ The shift from supply to demand driven training.
- ✧ An increased emphasis on the quality of training (Department of Labour, 1997).

The research emphasises the supply-side of tourism development. In particular and will outline a strategy to identify the gaps between the output of the tourism education and training system and the real demand of tourism employers. Also, the research recognises the importance of the major stakeholders, namely, the public sector, the private sector, the industry and communities.

There are a number of problems associated with the development of tourism as an area of study. These problems, as listed below, need to be considered and overcome (WTO, 1996).

Tourism education is multi-disciplinary in its approach and content. Therefore, it possesses elements that are attractive to other disciplines. For example, the human dimensions of tourism are particularly interesting to geographers, historians and behavioural scientists, while the commercial activity associated with tourism absorbs economists, financiers and those involved with business studies (Bennett: 2000:4-5).

As tourism is a relatively young subject area, it is not yet well established as an area for serious academic study, as it lacks the history and evolution of the more mature fields of study, which possess theoretical underpinnings still lacking in tourism.

Without a theoretical basis on which the subject can develop and grow, there currently exists a fragmented approach to tourism education. There is a lack of clear direction for sustained development, an absence of theory and focus and the lack of an embracing and comprehensive framework within which the subject may effectively be taught.

Another problem faced by tourism educators relates to the development of tourism as an activity. For example, international mass tourism, as we know it today, is a relatively recent product, which did not evolve until the 1950s/1960s. In addition, tourism activity changes continuously in the face of technological advancement.

According to Bennett (2000: 35) there are problems related with the availability of data. There is a distinct lack of historical numerical data and information, which is required to facilitate cross-cultural comparisons and valid research.

Tourism education is affected largely by the nature of the tourism industry. The industry is diverse and fragmented, cutting across many sectors and intruding on a wide range of operations. Therefore, definition is extremely difficult and the development of suitable and appropriate study at all levels to meet the needs of an indefinable industry is a difficult task.

The industry is dominated by small businesses led by entrepreneurs who do not possess formal training in tourism; and who do not necessarily recognise the need to support tourism courses to increase the overall professionalism of the industry.

Curriculum design is currently not conducive to developing an understanding of the environment in which the learners actually learn. This knowledge must be fed back into the process of curriculum and course design to ensure that the learners' needs are met.

Curriculum and course design do not always include horizontal integration.

Horizontal integration refers to factors that affect and influence the understanding of the learner during the learning process. These factors may include the learner's home life, the local community, work experience, social experience and the broader society. Horizontal integration considers anything that is currently happening in the learner's life, which will affect his/her performance, attitude and ability in an educational

context. These factors will affect the learner in one way or another. Therefore, horizontal integration is concerned with any influence acting on the learner at the same time that the learning is taking place (Bennett: 2000:45).

Skager and Dave (1977:14) suggest that horizontal integration is a function of all social agencies, which have an educational role, especially schools, colleges and universities. The planning of educational curricula should take into consideration such criteria as integration between the home and community, cultural activities and the mass media.

Horizontal integration does not always consider the interface between subjects of study, curricula subjects and extra-curricula activities, and learners with differing ethnic, physical, intellectual, religious and social characteristics (WTO, 1996).

Skager and Dave's (1977:14) article on Curriculum Evaluation for Lifelong Education attempts to illustrate the way in which the learner is enabled, through the curriculum, to make links between subjects, disciplines, skills and interests inside the institution and within the wider community. The way in which tourism is presented and the links it maintains with other subjects and disciplines can influence the degree of integration and consistency, which may be achieved across the curriculum (WTO, 1996).

According to Skager and Dave (1977:14), vertical articulation refers to the co-ordination of different levels of education, which draws together the learner's school experiences of the formal curriculum with pre- and post-compulsory education. Here issues, for example, the continuity of education and the development of educational experiences are salient factors. For example, those involved in tourism education,

drawing out a learner's experience of tourism and his/her first-hand encounter of the impacts of tourism may lead that learner to a better understanding of the issues.

Vertical articulation is concerned with the learning process through time and how it is affected and connected temporally. This implies the continuation of learning, which takes into account:

- ✧ Prior experiences.
- ✧ Current experiences within the curriculum.
- ✧ Possible future experiences.

Skager and Dave (1977:16) define vertical articulation as being the integration of different levels of schooling, between school curricula and pre- and post-school education, training and learning. Here, issues, for example, experiences and interests, continuity and smooth transfer, concern over future careers, different forms of further education and higher education are all considered within the educational framework (WTO, 1996).

The study of tourism is increasingly spreading down the curriculum. For example, tourism is being introduced as a subject at school level. Therefore, it is important that tourism is integrated into the curriculum as a whole and that the continuity and progression, which characterises other subjects and disciplines is actively sought by those involved in tourism education at all levels.

Both horizontal integration and vertical articulation affect the learner and his or her approach to the curriculum. There is recognition, within this approach, that learners take their understanding from the whole learning environment (horizontal), together with past experiences and aspirations for the future (vertical). The individual learner remains at the centre of curriculum development and course design.

This holistic concept of integration emphasises that it is very important that the dynamic needs of the learner are integrated into the totality of the learning experience.

If the question is asked why tourism should be studied in an academic context, then the following reasons can be put forward (WTO, 1996:99-102):

#### ✧ Tourism as a Trade Activity

Tourism is a significant activity in terms of world trade, as it: it has a major positive effect on the balance of payments in many countries; and it generates flows of materials, labour and wealth internationally.

#### ✧ Tourism as a Major Employer

Tourism is a major industry in its own right in terms of the number of employment opportunities it sustains. It is estimated that tourism directly and indirectly creates and sustains over 180 million jobs worldwide, representing over 10% of the global workforce. The tourism industry as a whole incorporates some of the most labour intensive and labour dependent sectors of industry including: - accommodation and restaurants; - transport and carriers; - attractions; and - tourist boards and national

tourist organisations (WTO, 1996:99-102).

✧ Tourism as an Economic Saviour.

Tourism is economically significant in parts of the world with little or no sources of wealth generation (WTO, 1996:99-102).

✧ Professionalism and Tourism Education.

The tourism industry is an essential economic concern and a major revenue generator. The livelihood of millions of employees and thousands of employers relies on tourist activity to survive. In order to ensure that the tourism industry is in a position to attract tourists and to meet their demands in a professional manner, an acceptable standard of tourism education and training is needed. Employers and managers must be equipped with the knowledge and ability to plan strategically, while employees must be provided with the skills required to meet tourists' needs directly.

To achieve the above, it is essential:

✧ That education and training for tourism is available.

✧ That it reflects a quality approach, which meets the needs of industry.

Tourism has an impact on all levels of the economy, the environment, including society and culture. The nature of tourism and the way in which the dynamics of the activity influence the host and generating societies are often misunderstood by policy

makers.

The negative impacts of tourism in societal, environmental and cultural terms are becoming increasingly apparent. In this context, it is noted that a need exists in the tourism industry for educators and researchers of tourism to be equipped to investigate such developments and feed the findings back to industry. It is necessary that all positive impacts of tourism are maximised and the negative impacts are minimised.

Education can be defined as a process that gives the individual a set of principles, not detailed applications. Education should provide the learner with a set of tools for interpretation, evaluation and analysis of new knowledge, as it appears, by developing the critical capabilities of the learner (WTO, 1996: 190-which should be developed by education and applied by the individual in different contexts (WTO, 1996: 190-193).

Training is a specific activity, which concentrates on the detailed application of lower level, often practical skills. Training is generally sector-specific and it seeks to equip the trainee or learner with clearly defined skills, for example, ticketing, waitressing or customer contact skills (WTO, 1996: 190-193).

In practice, education and training in tourism are deeply interwoven. Even at an educational level, training in the practical skills is seen as essential by the industry. Education and training should be parallel and complementary to each other. At different points of an individual's career, it is quite common that one may predominate over the other (WTO, 1996: 190-193).



Career paths are often difficult to define in the tourism industry. This may negatively affect:

- ✿ The way in which education and training is viewed.
- ✿ The amount of importance attached to education and training.

Negativity does little to promote education and training, as an essential human resource function within the tourism industry. The reasons for this include:

- ✿ The industry is dominated by a large number of small businesses and individual operators. Many people working in this environment have not actually experienced a career path, which could be defined as such.
- ✿ The industry is diverse. A form of 'training currency' does not exist, which the tourism workforce can utilise, to facilitate a more structured approach to career pathing.
- ✿ Tourism remains a low status industry for many people. This is especially reflected in the relatively high levels of staff turnover. The tourism workforce is a transient one. Generally, most small and medium sized employers (and some of the larger companies) see education and training as a cost, rather than an investment, and education and training is not financed in a committed way.
- ✿ Employees commonly do not feel loyalty to any one organisation, and are more inclined to frequently change between employers (WTO, 1996: 190-193).

## 2.3 SUMMARY

In this chapter, a number of definitions of tourism were explored. For the purpose of the research, the definition by Mathieson and Wall (1982) was accepted as the most appropriate.

Bennett's premise, ( Bennett, 2000:4-5), that there are usually two elements in tourism - the journey to the destination and the stay at the destination (including activities undertaken there) was accepted as the key aspect of this chapter.

The need to include domestic and international tourists in the definition of tourism as proposed by Bennett, 2000:4-5, was emphasised, and the fact that tourism models highlight the importance of consumer behaviour, transport, communication and planning.

In the next chapter, tourism education and training in South Africa will be elucidated on, including references to selected legislation pertaining to training and labour matters.

## CHAPTER 3

### TOURISM EDUCATION AND TRAINING IN SOUTH AFRICA

#### 3.1 INTRODUCTION

In the labour market the disparity in the distribution of jobs, occupations and incomes reveals the effects of discrimination in South Africa. Employment equity and skills training and development are measures which can be utilised to redress past and existing imbalances.

This chapter will, *inter alia*, examine various acts of Parliament related and/or applicable to the Employment Equity Act, 1998 (Act 66 of 1998), as well as the nature and extent of skills training and development, affirmative action and requirements for equal employment opportunities as prescribed by the Act.

#### 3.2 LEGISLATION

The following Acts impact on education and training in South Africa:

- ✿ The Employment Equity Act, Number 55 of 1998.
- ✿ The Skills Development Act, Number 97 of 1998.
- ✿ The Skills Development Levies Act, Number 9 of 1999.

✧ The South African Qualifications Act, Number 58 of 1995.

### **3.2.1 The Employment Equity Act 55 of 1998 (EEA)**

The Employment Equity Act (EEA) aims to: promote equality in the workplace; eliminate unfair discrimination; and ensure employment equity as a form of redress.

In addition, the EEA aims to create a work force that is representative of all South Africans.

The EEA affects almost every aspect of employment policy and practice: recruitment procedures, advertising and selection criteria; appointments and the appointment processes; job classification and grading; remuneration and employment benefits; and terms and conditions of employment.

The EEA identifies the following designated groups, which require special attention for equitable workplaces to be created: black people (African, Coloured and Indian people); people with disabilities; and women.

Employers are required to report on the categories of people (gender, race and disability) in their Workplace Skills Plans and annual training reports.

The EEA identifies designated employers (who employ more than 50 people and attain a particular profit level) who must implement affirmative action measures for people from designated groups to achieve employment equity (The Employment Equity Act 55 of 1998).

### 3.2.2 The Skills Development Act 97 of 1998 (SDA)

The Skills Development Act (SDA) introduces mechanisms to improve the relationship between the provision of education and the skills needs of workplaces, which include new learning programmes and new approaches to implementing workplace-based learning and financial incentives.

A cornerstone of the SDA is the introduction of new forms of learning - called learnerships and skills programmes. Also, the Act creates a framework and structure to support the implementation of the National Skills Development Strategy, including Sector Education and Training Authorities (SETAs), a skills development levy-grant scheme, the National Skills Authority (NSA), the National Skills Fund (NSF), the Skills Development Planning Unit (SDPU); and labour centres.

While the Skills Development Levy Act sets up the rules for the collection of levies, the SDA specifies that the money should be spent on education and training that is registered on the NQF and training that meets real needs in the labour market (The Skills Development Act 97 of 1998).

SETAs must promote and organise training within a sector. This means that people, who are not formally employed in an industry, but work or want to work within a sector (for example, small business and the unemployed), can gain access to development opportunities.

### **3.2.3 The Skills Development Levies Act 9 of 1999**

The Skills Development Levies Act provides the laws and regulations for funding from the development of the workforces, and is in line with the Skills Development Act. All organisations are required to pay a skills development levy of 1% of their payroll, if the organisation has an annual payroll of more than R250 000.

The Levies are distributed as follows:

- ✧ 70% of the levy is refundable to organisations in the form of grants, once they meet the various requirements set out for each grant.
- ✧ 18% of the levy is sent to the National Skills Fund for national priorities, for example, unemployment schemes.
- ✧ 10% of the levy is for the SETA's running costs.
- ✧ 2% of the levy is allocated to the South African Revenue Services (SARS), for the collection of the levies (Tourism Learnership Project, THETA, 2001).

### **3.2.4 The South African Qualifications Authority Act 58 of 1995 (SAQA)**

The aim of the South African Qualifications Authority (SAQA) Act is to provide for the development and implementation of a National Qualifications Framework (NQF), and to establish the South African Qualifications Authority.

The SAQA Act enables South Africa to develop its own integrated National Qualifications Framework, accompanied by a supporting quality assurance system.

The quality assurance system focuses on recognition of both newly obtained learning and recognition of prior learning (RPL). The role of the quality assurance system is to ensure that credits, unit standards and qualifications at all levels will comply with recognised national and international standards and be obtained by learners, who comply with the set standards (The South African Qualifications Authority Act 58 of 1995).

For South Africa to be internationally competitive, an education and training system is needed that will provide the competencies required for global economic competitiveness, ensure the provision of national infrastructure, as articulated in the RDP, redress the inequities created by the apartheid era, and meet the needs of individual learners within the context of the greater labour market (Du Pre, 2000: 10 and Smit, 1997:236-24 1).

### **3.2.5 National Qualifications Framework (NQF)**

The National Qualifications Framework (NQF) ensures that qualifications will promote an integrated approach to education and training. Each standard and qualification, which meets the requirements of the NQF will be registered by SAQA.

Therefore, the NQF provides the means to register all types of learning achievements within one of eight levels. The NQF will embody all registered unit standards, credits and qualifications in such a manner that the interrelationships will enhance and

facilitate career pathing, portability, articulation and flexibility between economic sectors.

A fundamental goal of the NQF is to create a mechanism to enable and promote lifelong learning. To achieve this goal, the NQF will promote lifelong learning by the: establishment of a Record of Prior Learning for each learner; recognition of prior learning within the person's Record of Learning and register all qualifications; and maintaining Records of Learning by adding new qualifications to one's Record of Learning.

The objectives of the NQF are to:

- ✿ Create an integrated national framework for learning achievements;
- ✿ Facilitate access to, and mobility and progression within education, training.
- ✿ Career paths.
- ✿ Enhance the quality of education and training.
- ✿ Accelerate the redress of past unfair discrimination in education, training and employment opportunities.

The objectives are aimed at contributing to the full personal development of each learner and to the social and economic development of the nation at large. (Du Pre, 2000:11 and Smit, 1997:23 6-24 1)



### 3.2.6 THETA

The Sector Education and Training Authority (SETA) for the tourism industry is known as the Tourism, Hospitality and Sport Education and Training Authority (THETA).

THETA was established on the 1 April 2000, and included the merger of the Hospitality Industries Training Board (HITB) and the Travel Industry Education and Training Authority of South Africa (TETASA).

THETA conducts its activities within the tourism and hospitality economic sector. The research, with regard to sectoral needs analysis for training and development, acknowledges the 4 industry sub-sectors: Tourism and Travel Services, Hospitality, Gambling and Lotteries and Conservation and Guiding.

The specific areas of tourism are divided into the following sub-sectors:

- ✿ Hotel & Resorts.
- ✿ Travel Agents.
- ✿ Retail Tour Wholesalers.
- ✿ Tourism Marketing.
- ✿ Cultural Resource Attractions.

- ✧ Natural Resource Attractions.
- ✧ Tourism Administration.
- ✧ Tourism Transportation.
- ✧ Conventions & Events Attractions and Entertainment.
- ✧ Food & Beverage.
- ✧ Other (consultants, etc.).

THETA's main responsibilities include:

- ✧ The Sector Skills Plan (SSP).
- ✧ Tourism Learnership Project (TLP).
- ✧ South African Tourism Institute (SATI).
- ✧ The Sector Skills Plan (SSP).

Each SETA has to prepare a Sector Skills Plan (SSP) for its sector, and to drive and monitor the Plan's implementation.

Reliable data on the employment levels in recent years by occupational category is not available. However, industry focus groups have indicated that in the past several years, the tourism and hospitality sub-sectors have seen significant changes in the numbers employed in particular occupations.

Employers and industry service personnel provide the following opinions on changes in tourism and hospitality activity and employment:

- ✧ International tourist numbers have increased significantly, from 3,7 million foreign tourists in 1994 to 5,8 million visitors in 1999.
- ✧ Domestic tourism trends have increased, in line with worldwide trends.
- ✧ The hotel, restaurant and attraction development activity of the past several years, has created significant capacity, which the industries have attempted to fill.
- ✧ There has been significant growth in the bed and breakfast and guesthouse industries.
- ✧ Recent legislative and regulatory developments have brought previously informal sections of the tourism and hospitality industries into the formal sector, for example, taverns.
- ✧ There has been a significant development of new game reserves and game lodges; in general, inefficient (high) staff levels have been maintained in many

sections of the industry - the workforce in many occupational categories is relatively unskilled.

- ✿ Between 15 000 to 20 000 direct tourism jobs were created annually between 1994 and 1998.
- ✿ Capacity in the tourism industry in terms of facilities and services to meet the trends of the anticipated "tourism boom" improved.
- ✿ In terms of tourism jobs, the Western Cape has a significant increase in tourism industry employment levels.
- ✿ Direct employment in the tourism industry is not widespread throughout the provinces, rather it is localised to urban areas and tourist attractions.
- ✿ Some new employment opportunities have been recently created with the licensing of additional casinos.
- ✿ The further development of the gambling and lotteries industry and the issuing of additional casino licences should create additional employment opportunities in the tourism sector.
- ✿ Employment equity legislation has driven the creation of supervisory and managerial-level opportunities for previously excluded sections of the workforce in sections of the industry.

- ✧ The restaurant section of the industry believes that the availability of qualified, experienced chefs/cooks has declined, even though hospitality and catering activity has increased.
  
- ✧ With the re-entry of South African teams into the international sports arena, many new employment opportunities in sport have been created.
  
- ✧ The estimated decline in numbers employed from 1997 to 1999 (about 6 535) is a reflection of downsizing in national, provincial and local government.

### **3.2.7 Implications for the 2001 - 2002 Sector Skills Plan (SSP)**

A number of the key factors influencing the Sector Skills Plan (SSP), which emanate from the sector profile analysis, include:

- ✧ At approximately 42 000 employers and 5 sub-sectors, THETA has a large and diverse range of employers to consider when developing its SSP.
  
- ✧ It is estimated that less than one-third of THETA employers will be obliged to pay levies.
  
- ✧ Most of the organisations in this Sector are classified as SMMEs (80% or more).

There are approximately 600 000 employees that fall within this Sector.

Occupational categories unique to this Sector include:

- ✧ Chef.
- ✧ Caterer.
- ✧ Nutritionist.
- ✧ Pastry chef.
- ✧ Kitchen hand.
- ✧ Bar/tavern/shebeen operator.
- ✧ Cellar person/wine steward.
- ✧ Front of house service.
- ✧ Host/hostess.
- ✧ Housekeeper.
- ✧ Chambermaid.
- ✧ Maid/cleaner.

- ✧ Tour broker.
- ✧ Travel consultant.
- ✧ Tourist guide.
- ✧ Game warden.
- ✧ Field range tracker.
- ✧ Croupier/bookmaker.
- ✧ Ticket seller/game controller.
- ✧ Gaming surveillance.
- ✧ Coach, referee.
- ✧ Professional athlete.
- ✧ Instructor.
- ✧ Trainer/assessor (Website: THETA's Tourism Learnership Project management).

Although this Sector typically employs a high ratio of black female employees, they are generally employed in low-skilled occupational categories and have limited recognised qualifications.

Hospitality organisations account for more than 85% of the employers in this Sector.

Gambling and lotteries licensees must abide by an agreed employment equity plan as a condition of their licences. Therefore, this sector has a representative employee base in respect of previously disadvantaged personnel. In spite of this, the industry is still dominated by white males in management and executive positions (Website: THETA's Tourism Learnership Project management).

The tourism and travel services sub-sector is dominated by white employees.

White males in executive/management positions and black males in lower skilled occupations dominate the Conservation and Leisure sub-sector. There are a low number of female employees in this sub-sector (Website: THETA's Tourism Learnership Project management).

In general, white employees dominate management and supervisory positions, although this is slowly changing to represent the South African population at large. In general, there appears to be skills shortages in respect of these occupational categories.

Unskilled employees in craft, labourer and related positions predominate in this Sector (Website: THETA's Tourism Learnership Project management).



In general, employers recognise only formal qualifications and excluding experience and on-the-job training as relevant qualifications.

There are a number of additional training functions that needs to be implemented in the hospitality sub-sector.

Many of the employees in the operative occupational categories do not have recognised training relevant to their job requirements. In addition, some employers identified that employees in low-skilled jobs require basic skills, for example, literacy, numeracy, communication skills and hygiene training.

In terms of training needs, employers frequently identified the need for the development of soft-skills in employees, for example, cultural diversity, motivational courses and work ethnic (Website: THETA's Tourism Learnership Project management).

### **3.2.8 Workplace Skills Plans (WSPs)**

The 330 total number of Workplace Skills Plans (WSPs) received by the Department of Labour is few in comparison with the estimated number of leviable enterprises (13 000). It should be noted that the great majority of enterprises are SMMEs (Website: THETA's Tourism Learnership Project management).

An analysis of the WSPs received, indicated that a majority specified that training is required in:

- ✧ Management and supervision.
- ✧ Customer service.
- ✧ Health and safety.
- ✧ National Qualifications Framework (NQF) levels 1 and 2.

Problems in implementation of NQF levels in enterprises were:

- ✧ Lack of qualifications registered with the NQF.
- ✧ Time constraints.
- ✧ Financial constraints.
- ✧ Staff turnover.

Many sector training programmes indicate broad areas of training intention. The specific training that is required or intended make statements such as, 'NQF implementation' or "external course". The quality of a sector training programme will closely reflect the capability and motivation of the sector training institution.. Some sector training institutions with multiple clients identify common training needs, for example, THETA's Tourism Learnership Project management.

The sector training programmes format and requirements have deficiencies that should be corrected.

- ✧ Sector training programmes should include total full-time, total part-time and full-time equivalent employee data, to enable scooping of the Sector and indicate proportional training effort.
- ✧ Sector training codes are limiting for describing employment skills and needs. Jobs are not adequately covered, and an occupation, for example, "General Manager", means different things in very small and very large enterprises.
- ✧ The format of sector training programmes needs revision, so that figures given in the different sections correspond (Website: THETA's Tourism Learnership Project management).

### **3.2.9 Tourism Learnership Project (TLP)**

A learnership is a work-based programme, combining the theory and practice that results in a national qualification (NQ). A learnership is a contract drawn up between a learner, an employer and a training provider. A learnership has to be registered with THETA and the Department of Labour (DoL). An NQ is the core of the learnership and is made up of unit standards, against which the learner must be assessed, to demonstrate the competence required.

The prerequisites for a learner are: literacy; capacity to carry out the job and associated learning; and the desire to work hard and succeed.

The TLP will:

- ✧ Facilitate the development of unit standards and the registration of NQs in the sub-sectors and occupations, where they do not currently exist, in order to construct learnerships.
- ✧ Increase the availability of NQs, which will trigger increased investment in training by employers, who will have articulated standards of competence against which to measure the impact of training.
- ✧ Develop trainer and learner resources to facilitate the delivery of the learnerships.
- ✧ Build trainer and assessor capacity to provide on-the-job and off-the-job components of the learnerships.
- ✧ Develop models and protocols for the implementation of learnerships and the registration of learnerships.
- ✧ Award 10 000 NQs to employed people and implement 5 000 learnerships for the unemployed over four years.
- ✧ Develop systems and support the training of unemployed people through learnerships that provide skills necessary to find work in a growing job market (Website: THETA's Tourism Learnership Project management).

### **3.2.10 South African Tourism Institute (SATI)**

South African Tourism Institute (SATI) is funded by the Spanish government and managed by THETA. SATI will upgrade the skills of teachers, trainers and assessors and fast track tourism training programmes at various levels.

In the above context:

- ✧ School teachers will benefit from a knowledge and skills transfer programme.
- ✧ Trainers and assessors, currently employed in tourism, will improve their skills.

SATI's priority areas include development and capacity building of educators, trainers and assessors through:

- ✧ A national development programme of teachers offering Travel and Tourism Studies and Hospitality in Grades 10, 11 and 12.
- ✧ A national development programme of on-the-job training instructors in the travel and tourism and hospitality fields.
- ✧ A national development programme of assessors in the travel and tourism and hospitality fields.
- ✧ Creation of a National Centre of Research and Travel and Tourism and Hospitality Resource material.

- ✧ Establishment of a trust fund for bursaries, scholarships, conferences and study tours.
  
- ✧ Assessment and funding of identified tourism development projects  
(Website:THETA's Tourism Learnership Project management).

### **3.2.11 Key concepts pertaining to learnerships, skills facilitated programmes and work-based qualifications**

The following concepts are key areas related to Learnerships, Skills Facilitated Programmes and Work based National Qualifications:

- ✧ Trainers can train groups of learners or perform individual coaching to help learners achieve competence.
  
- ✧ Training adults in the workplace (on-the-job) is different to training people in the classroom (off-the-job). Training usually takes place off the job in a group situation.
  
- ✧ Coaching takes place on the job on a one-to-one basis.
  
- ✧ Coaching is the process you use to ensure the development and growth of learners, as they work towards achieving agreed standards.
  
- ✧ Coaching involves: listening, giving guidance and direction, providing instruction and working with learners on how they can achieve objectives, skills or outcomes.

- ✧ In the above context, it is essential to obtain agreement with the learner on the need for coaching and the action plan for the coaching sessions.
  
- ✧ Coaching is an ongoing process that depends largely on a learner's prior learning and skills levels. Learning is essentially experiential, as people learn from their experiences. It is essential to establish what the learner's existing experience is, before coaching starts.
  
- ✧ Step 1 in the coaching process is to determine the need.
  
- ✧ Desired performance must match actual performance. If there is a discrepancy between the two, then the manager/supervisor has to identify the gap. The questions should be asked of whether the gap is a training, coaching or counselling need?
  
- ✧ Step 2 involves explaining the task to be coached/arrange a time and place for coaching.
  
- ✧ The coach must create a safe learning environment for the learner. The learner must feel comfortable in the learning experience. The coach must practice active listening skills, be able to explain the purpose of the coaching process, and give instructions in a clear way.
  
- ✧ Step 3 is to demonstrate the task to be coached/communicate theory and knowledge.

- ✧ The coach needs to demonstrate the required standard to the learner. The most important part here is that the learner understands what you are doing. Also, the learner must understand his or her role in the learning process.
- ✧ Step 4 is when the learner has to practice tasks to complete the coaching session.
- ✧ The learner must be able to practice the whole task with the coach observing and only interrupt if the learner is doing something in a dangerous or incorrect manner. For example, guiding techniques - incorrect microphone techniques. The coach observes the learner's knowledge while he or she is demonstrating the task.
- ✧ Questioning plays an important part in coaching. Questions must be relevant and open, to allow learners to demonstrate their knowledge and understanding.
- ✧ Step 5 involves feedback on performance/provide feedback.
- ✧ After practising the task, specific feedback should be given to the learner. This comes in the form of positive feedback (what they have done well) and areas for improvement.
- ✧ Step 6 is the monitoring of the training, which is an ongoing progress.
- ✧ Ongoing assessment of the learner in the workplace or realistic environment after the coaching session. Assessment enables the coach to assess the



effectiveness of the coaching session and the transference of knowledge. The aim is to see an improvement in the learner's performance at all times (Website: THETA's Tourism Learnership Project management).

### **3.2.12 Cape Technikon Tourist Guiding Coaching Example:**

- ✿ Step 1 and Step 2: There is a buy-in process, which takes place with the trainee tourist guides (learners). An explanation is given of the course and it is ensured that learners understand and give input into the process itself. Time frames, etc. for practicals (training tours) are established and the learner has to agree to the entire schedule. For example, part-time learners have to arrange with their organisations around the time frames of practical tours.
  
- ✿ Step 3: The first practical is a cultural township tour, where learners are taken on one coach and they participate as tourists. This gives the learner the opportunity to observe the tourist guide and to "place themselves in the shoes of the tourist".
  
- ✿ Step 4: Learners are taken on practical tours, where they have to guide a section of the tour. Learners have an opportunity to prepare their sections before the time. Most learners will visit the attractions, etc. on their own, as part of their preparation. Learners are evaluated on the Cape Peninsula Drive (CPD) and the Winelands tour. For each tour they have a chance to practice on the microphone, do a walkabout, etc. There is also a step up process from the CPD tour to the Winelands. For example, learners may refer to notes on the CPD, as it is the first time (mostly) that they present on a coach and talk on a

microphone. The CPD tour takes place in small groups (maximum 15 per coach) and the Winelands tour takes place in bigger groups (approximately 30 per coach). This gives the learner the opportunity to guide in different situations (the difference between a micro bus and a coach). The trainer briefs the learners at the beginning of the tour and ensures that the learner understands what is required. The trainer then observes presentations. The trainer assesses the performance against an evaluation sheet that considers body language, voice projection, etc. The rest of the learners and the trainer will participate and ask questions as tourists would.

- ✦ Step 5: Debriefing sessions with each learner, takes place after lunch and at the end of the day. Feedback is provided in a constructive and positive manner. Learners are made to understand which areas they need to improve on and how they could go about doing it. For example, a very nervous learner, hands shaking, etc. might be asked to practice tours (role plays) with family members on a daily basis, and/or to take friends on tours, etc. Very important: Learners are at all times asked to give comment on their participation. At the end of the day, a general debriefing is done with the entire group on the day's events. Step 6: Ongoing assessment in the workplace still needs to be implemented in a structured manner at the Cape Technikon.

### **3.2.13 Assessors**

Assessors assess learners in the workplace or a realistic work environment. Assessors must have technical competence against the assessor unit standards and be registered with THETA.

The role of the Assessor is to:

- ✧ Select the unit standard (and use other criteria, for example, job descriptions).
- ✧ Plan the assessment.
- ✧ Prepare the candidate for the assessment.
- ✧ Collect evidence.
- ✧ Match the evidence to the unit standard.
- ✧ Make a judgement about the person's performance, this means, is the learner competent.
- ✧ Provide feedback to the learner.

(Smit, 1997:252)

### 3.2.14 Competence

Competence is the ability to consistently perform the activities to the standard expected.

Competence is the ability to:

- ✧ Demonstrate skills.

- ✧ Explain the knowledge associated with the skills.
  
- ✧ Apply the skill (ability) in a variety of contexts and give reasons for changes in performance (Smit, 1997).

### **3.2.15 Assessment**

A key step in the application of a national qualifications framework would be reliable assessment. Competence is measured through assessment. Assessments may be done for a number of reasons, using a variety of assessment methods:

- ✧ Assessment may be diagnostic. Diagnostic assessment is used to ascertain the staff member's/learner's level of competence before any training is done.
  
- ✧ Formative. Formative assessment is used to measure the effectiveness of any training that has been done. Formative assessment is done on an ongoing basis.
  
- ✧ Summative. Summative assessment is used at the end of an assessment period to ensure that the staff member/learner is competent in the whole job and not only parts of the job (THETA, TDOO 1, 2001: 4-6).

According to THETA, TDOO 1, 2001: 4-6, the basic principles of assessment, which are essential when selecting, designing, implementing or evaluating assessment are listed below.

### 3.2.16 Principles regarding the process of assessment:

- ✧ Validity - is the assessment relevant and are the results measuring what it is supposed to measure?
- ✧ Reliability - is the assessment consistent with other evidence and are the results consistent over time?
- ✧ Fairness - does the assessment consider the learner's special needs?
- ✧ Flexibility - can the assessment be used in a variety of contexts?
- ✧ Membership of an industry association.
- ✧ Examples of products developed or work completed.
- ✧ Outline of work experience.
- ✧ Awards/achievements.
- ✧ Examples of resources developed.

The assessor will evaluate the evidence produced and the learner's competence. This may be done in a variety of ways, which could include practical assessment, simulation, written tests and questioning (THETA, TDOO 1, 2001: 4-6).

The assessor/s will make a recommendation about the learning and the amount of credit that should be given based on their evaluation and the evidence that was produced.

The assessor will write a report recommending whether the learner should be given the credits/qualification. The report must include sufficient supporting evidence for the decision, and be based on the evidence produced by the learner and any assessments that may have been done.

Based on the assessment decision, the assessor will complete the Declaration of Competence Form and submit it to the Internal Quality Assurer/Moderator to validate the evaluation.

Once the Internal Quality Assurer, the assessor and the Site Contact have signed the Declaration of Competence, it should be submitted to the ETQA.

If the applicant was assessed as competent, a certificate is issued.  
(THETA, TDOO 1, 2001: 4-6).

### **3.2.17 Principles regarding the evidence**

- ✧ Sufficiency - is there enough assessment?
  
- ✧ Authenticity - is the evidence produced from the learner being assessed?

✧ Currency - is the assessment up-to-date?

(THETA, TDOO 1, 2001: 4-6).

### **3.2.18 Recognition of Prior Learning ([www.ctech.ac.za/polic/priorlearning.html](http://www.ctech.ac.za/polic/priorlearning.html))**

By applying the process known as recognition of prior learning (RPL), the NQF becomes a flexible system that enables employers to identify the existing competencies and deficiencies of the workforce accurately.

RPL allows for the assessment of employees who have learnt informally, and through experience, and who feel competent to perform at a certain level.

According to the website ([www.ctech.ac.za/polic/priorlearning.html](http://www.ctech.ac.za/polic/priorlearning.html)), the RPL process consists of the following steps:

- ✧ The applicant must identify the learning he or she wants to have evaluated.
- ✧ The assessor and the applicant must differentiate between learning and experience. Learning must be expressed in specific outcomes that are relevant and appropriate for the credits required.
- ✧ The applicant will collect a portfolio of evidence that includes as much evidence as possible of experiences and learning that are relevant to the RPL process.

Examples of evidence that might be included in a portfolio of evidence:

Curriculum vitae

Letter of reference/verification

Copies of relevant qualifications and current certificates

List of courses attended

Video tape

([www.ctech.ac.za/polic/priorlearning.html](http://www.ctech.ac.za/polic/priorlearning.html)).

### **3.3 SUMMARY**

Human resource management is important in the transformation of South Africa, as it is critical for effective institutional functioning. Every effort would be required to mobilise, organise, and utilise resources optimally within the spheres of employment in order to achieve, maintain and enhance the common good of society. Proliferation of knowledge, skills and expertise can contribute greatly to the effective functioning of the public sector. In this regard, human resource development is a critical factor as it involves upgrading of the qualitative aspects of personnel. The effects of discriminatory labour practices over the years have created momentous challenges for a competent representative work force that can render top-quality service to the community on an ongoing basis. In addition, within the labour market in the tourism industry, there are marked gaps across all levels of employment. As a priority, human resource development policies should be rigorously pursued, while simultaneously addressing long-outstanding racial, gender and disabled inequalities in employment.



## CHAPTER 4

### TRAINING AS A DISCIPLINE INCLUDING AN OVERVIEW OF TRAINING MODELS

#### 4.1 INTRODUCTION

Training is regarded as an essential element of growth and development. This is *mutatis mutandis* applicable to the tourism industry.

In this chapter, a theoretical approach to describing the training function will be followed. An overview of training models will be provided, as well as selected theoretical aspects of the training process will be examined.

#### 4.2 OVERVIEW OF TRAINING MODELS

Sloman (1994:21), states that the majority of training models are systematic, that is, they describe training undertaken on a planned basis as a result of applying a logical series of steps. In practice, the number and description of these steps tend to vary, but in general terms they cover aspects such as:

The development of training objectives and plans.

The development of a training policy.

The identification of training needs.

The implementation of planned training; and

The validation, evaluation and review of training (Sloman, 1994:21).

According to Schultz (1997:11), the validity of the traditional model of management training has become questionable. In order to develop an integrated model, which reflects the changing environment in which learners in tourism function, it is necessary to examine a number of training models. These will be explained in the paragraphs that follow.

#### **4.2.1 Cherrington's systems model for training**

Cherrington (1995:323), proposes three training phases in his systematic model which are as follows:

- ✧ An assessment phase.
- ✧ A training and development phase.
- ✧ An evaluation phase.

##### **4.2.1.1 Assessing training needs and resources**

Cherrington (1995:324), states that a good assessment includes an organisational analysis, which suggests how well the organisation is achieving its goals and objectives. According to Schultz (1997:13), an operational analysis, which determines the skills required to accomplish specific organisational goals and a personnel analysis, which offers information on the strengths and weaknesses of the current decision-makers, should be completed.

A training need is only indicated if a determined performance deficiency or weakness is the result of inadequate job knowledge or skill (Cherrington, 1995:324).

#### **4.2.1.2 Identification of training objectives**

According to Cherrington (1995:326), the results of training needs analyses should be presented in behavioural terms. This would contribute to the development of specific objectives, which could be utilised to produce quality-training activities and facilitate the evaluation process. The development of criteria is a logical progression from identifying objectives.

Criteria should be developed in terms of an action, which must be carried out. Criteria should specify a standard of performance as well as relevant constraints and time limitations for performing the behaviour (Schultz, 1997:13).

#### **4.2.1.3 Selected training methods and learning principles**

Cherrington (1995:358) proposes that training techniques can be categorised into “on-the-job methods” which focus on increasing immediate productivity and “off-the-job” methods which are aimed more specifically at long-term development and education.

According to Cherrington (1995:327-341), the theory of operant conditioning and social cognitive theory offer similar conditions that facilitate learning. Both theories suggest that the concepts of stimulus, response, motivation, feedback, transfer of learning, learning curves and forgetting are important in designing training programmes.

The selection of a training method should be determined by the training objectives. Training techniques should include the major principles of learning and acquiring specific skills (Cherrington, 1995:367).

#### **4.2.1.4 Comparison between training outcomes and criteria**

Two important issues of evaluation are the identification of criteria and the research design. Criteria can be categorised into levels of reaction, learning, behaviour and results. The “pre-test-post-test” control group design and the Solomon four-group design are highly recommended for gathering data which will produce a comparison of training outcomes against criteria (Cherrington, 1995:385).

Cherrington’s model indicates interaction between this step and the development of criteria. Results of the comparison may also require feedback and interaction between this step and those of assessing training needs and identifying training objectives.

Cherrington (1995:335-337), regards the transfer of learning as initiating in the training and development phases and continuing through the evaluation phase. Transfer of learning reacts on the assessment phase with the possible need to reassess training needs and objectives.

In Cherrington’s systems model for training, the transfer of learning is highlighted in the training and development phase. According to Cherrington (1995:333), transfer is regarded as a learning principle, which should be built into the design and presentation of training programmes. A diagram of Cherrington’s model follows in figure 1.

- ✧ The social processes employed by the group must enhance the capability of the members to work on future tasks.
- ✧ The measurement of the output of the group against the performance standards of the people who receive or review output; and
- ✧ The group experience should, on balance, lead to the satisfaction of the members.

For the group to be effective, the output must be acceptable to the recipients of the output, which emanates from the group process. Group members must also continue to function again in the future and the group process must, on balance lead to member satisfaction.

The normative ecological model proposed by Hackman (1987:323), specifies that a number of factors should be present if a group is to perform well. The model does not provide an indication of the method utilised to evaluate the strengths and weaknesses of the group.

According to Kreitner & Kinicki (1995:339), two criteria essential for effectiveness in work teams are viability and performance. The latter (performance) means the acceptability of output to recipients within or outside the organisation of services, products, decisions, information or performance events. Alternatively, team viability refers to team member satisfaction and the continued willingness to contribute to group activities.

The ecological model emphasises the interaction between organisms and their environment. The model indicates the dependence of teams on the organisation as a life support system.

The following are critical organisational variables that constitute the ecology within which teams function:

- ✧ Organisational strategy.
- ✧ Organisational structure.
- ✧ Technology.
- ✧ Organisational culture.
- ✧ Reward system.
- ✧ Administrative support.

Teams have a much greater chance of being effective if they are nurtured and facilitated by the organisation (Kreitner & Kinicki, 1995:339). The team's purpose needs to be consistent with the organisation's strategy. In addition to this, team participation and autonomy require an organisation structure that nurtures a specific culture and values, which support the team dynamics.

The organisation needs to provide the appropriate technology and training for team members to achieve their goals. Finally, the organisation needs to support teamwork through the organisational reward system (Hutton, 2000:29). In order to achieve their objectives, teams require support from the organisation in terms of administration and training to ensure an adequate supply of skills necessary to the successful completion of assigned tasks.

According to Kreitner & Kinicki (1995:340), effective teamwork is achieved through cooperation, trust and cohesiveness. These factors are important in the context of tourism disciplines. With the increase in community demands and developmental tourism disciplines obligations, organisational success will depend more on teamwork than on individual roleplayers.

The following components are seen as contributors to effective teamwork (Hutton, 2000:29-30):

- ✧ Cohesiveness.
- ✧ Trust.
- ✧ Co-operation.

According to Kreitner & Kinicki (1995:344), cohesiveness is a process whereby a sense of “togetherness” emerges to transcend individual differences and motives. Members of a cohesive group are supportive of each other and are reluctant to leave

the group. Group members also need each other to accomplish a common goal.

Hutton (2000:32), proposes two forms of group cohesiveness:

- ✧ Socio-emotional cohesiveness, which develops when individuals derive emotional satisfaction from group participation. Most discussions of group cohesiveness are limited to this type.
  
- ✧ Instrumental cohesiveness, which occurs when group members are mutually dependent on one another because they believe that they could not achieve the group's goal separately. From the perspective of accomplishing tasks in teams, this cannot be ignored.

Learners in tourism need to take constructive steps to foster and encourage cohesiveness as it is an effective component in teamwork.

#### **4.2.3 Singer's four-phase model**

Singer (1990:174), states that needs assessment is undertaken by means of organisational, person and task analysis. In the design phase, Singer (1990: 176-178) emphasises the establishment of objectives and the impact of learning principles on effective design. Trainees are selected and methods for final programme evaluation are decided.

The method of training involves the decision on the most appropriate location for the training to be conducted. According to Singer (1990:179-189), there are advantages

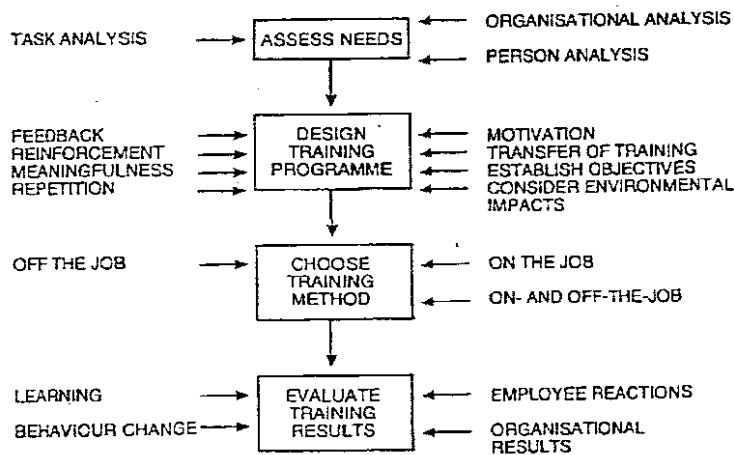


and disadvantages associated with training in the actual workplace or training away from the work place.

Singer (1990:193) states that designing relevant and appropriate training programmes, understanding learning principles and conducting training sessions will be of limited value if the acquired knowledge, skills and abilities are not transferred to the actual job situation. Although Singer proposes that the transfer of training be considered in the design phase, he does not assess the success of transfer until the evaluation phase of his model.

According to Schultz (1997:18), the following four steps of evaluation are important:

- ✧ Reaction. Establishing the degree to which the trainees enjoyed the programme through the use of reaction forms.
- ✧ Learning. Establishing whether the training material that has been taught, has been learnt.
- ✧ Behaviour. Establishing whether what has been learnt in the training process has been transferred into practice.
- ✧ Results. Establishing the overall impact that training has had on the organisation.



Singer's Four-Phase Model

Figure 2

According to Singer (1990:195), many organisations rarely progress beyond the learning stage of evaluation. Failure to evaluate behaviour and results reduces the ability to determine whether the training programme has been successful in its goal of facilitating transfer of learning to the work situation and contributing to the functioning of the organisation (Schultz, 1997:18).

Singer (1990:174), views the transfer of learning as part of the design stage in his four-phase model and places transfer of training prior to the establishment of training objectives. However, transfer of learning should be considered in conjunction with learning principles (Singer, 1990:174).

#### 4.2.4 Hutton's model of factors promoting team effectiveness

According to Hutton (2000:45), there are four groups of factors that impact on work teams:

- ✧ The organisational environment.
- ✧ Individual background factors.
- ✧ Team factors; and
- ✧ Team effectiveness.

Hutton's model of factors promoting team effectiveness is effective in this context.

The organisational environment comprises of resources, leadership, organisational culture, organisational strategy, education, training programmes and reward systems.

The organisational environment provides the background within which the team operates. Team factors include group size, norms, decision-making, member roles, conflict and cohesion. Team factors are influenced by the organisational environment, which enhances or retards the group process. The team factors combine to develop group synergy (Hutton, 2000:48).

Individual background factors are factors that the individual brings to the organisation. These factors include personality, attitudes, values and skills.



Hutton's Theoretical Model of Factors Promoting Team Effectiveness

Figure 3

These individual factors are integrated into the team through the facilitation process (Hutton, 2000:48).

According to Hutton (2000:48), team effectiveness is the consequence of the synergy developed by the integration of individual team factors. Team effectiveness is measured by the team's ability to solve problems, its task output and the perpetuation of the team.

In terms of feedback, team effectiveness will influence the individual background factors, which include personality, attitudes, values and skills. Team factors including group size, group norms, decision-making, member roles, conflict and cohesion will also be affected by feedback.

#### 4.2.5 Broad and Newstrom's model of key decisions

Broad & Newstrom (1992:37), state that the first key decision involves identifying performance requirements, possible performance problems and the urgency attached to solving performance problems. Opportunities to improve the quality of services or products should also be investigated.

In the second step, the characteristics of performers and managers are identified. There is also a need to highlight interference from the work environment, lack of motivation or incentive. Consideration of the changing and culturally diverse workforce that may require support in understanding, accepting or adapting new work procedures is emphasised by Broad & Newstrom (1992:37).

According to Broad & Newstrom (1992:38), the third step involves establishing whether the desired performance is supported by information flow, work procedures, equipment, reward systems and workplace learning systems. Positive consequences for avoiding the desired performance, negative consequences for the desired performance and cultural blocks should also be examined.

In the fourth step, Broad & Newstrom (1992:39) propose investigating whether a job aid could replace some or all of the training and if training could be embedded in the job. Decisions regarding how and where training will be presented and relapse prevention, must be undertaken. When a need for additional knowledge or skills is significant, training should be considered as part of the solution (Broad & Newstrom, 1992:38).

Step five is undertaken in conjunction with step six. According to Broad & Newstrom (1992:39), barriers which may interfere with the transfer of training strategies that will eliminate or reduce these barriers should be identified. The implementation and management of transfer strategies should also be addressed.

Step 6 is undertaken in conjunction with step 5. Performance objectives are written, criterion tests are developed, course content and prerequisites are specified. The participants are identified and the resources allocated (Broad & Newstrom, 1992:39).

In the final step, the evaluation of training through investigating levels of reaction, learning, behaviour and results are proposed by Broad & Newstrom (1992:39). The evaluation outcome should indicate whether continuing or new performance problems and/or opportunities lead to the first decision in continuance of the cycle.

Broad & Newstrom (1992:37-39), state that attention should be paid to the transfer of learning throughout the entire training and development process. Opportunities for improving transfer of training levels are built into every stage of the systematic model, which should include a feedback mechanism.

#### **4.2.6 The Management Model of Fox *et al***

The Management Model of Fox *et al* (1991:5), adapted for training, illustrates five possible enabling functions, which can serve collectively as a conversion mechanism to facilitate conversion from a dysfunctional situation to a functional state, for example, from a situation of training need to a situation of completed training. The proposed enabling functions are:

- ✧ Policy-making.
- ✧ Planning.
- ✧ Organising.
- ✧ Leadership and motivation; and
- ✧ Control and evaluation.

The model takes as its point of departure a perceived dysfunctional general environment, for example a training needs environment. The above-mentioned functions are situation-bound and cannot change as the needs of the particular environment fluctuate. The perceived general environment consists of various perceived sub-environments, which could include the following types of environments:

- ✧ Political.
- ✧ Social.
- ✧ Economic.
- ✧ Technological; and
- ✧ Cultural.

The above-mentioned sub-environments are only examples of possible environments. For the purposes of this research, it is understood that the types and number of general environments and sub-environments are infinite and unlimited.

Fox et al (1991:3-4), indicate a specific environment, within the general environment that consists of the following:

- ✧ Suppliers.
- ✧ Competitors.
- ✧ Regulators; and
- ✧ Consumers.



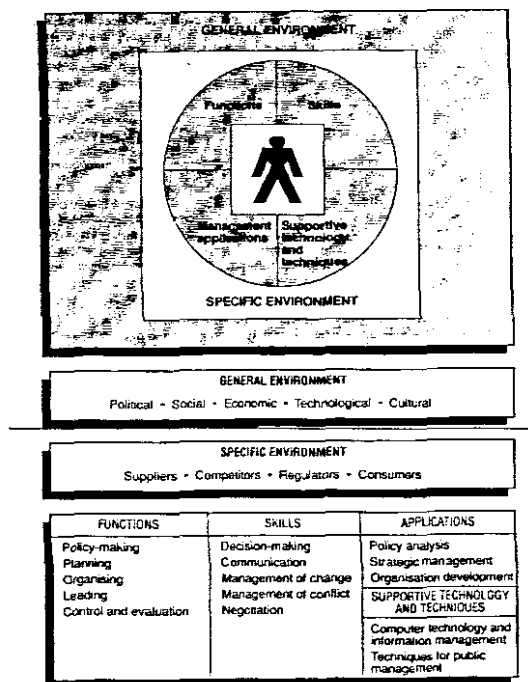


Figure 4 - The management model of Fox et al.

The interaction between the components of the general environment are regulated by specific functions, skills and applications. An illustration of the model of Fox *et al* is provided in figure 4.

#### 4.2.7 The Systems Model of Easton

Easton's model is based on inputs (which are environmentally based), a conversion process (which refers to the management process), outputs (which are goal-oriented) and feedback.

According to Dye (1995:38), forces generated in the environment that affect the social system are viewed as inputs. The environment is any condition or circumstance defined as external to the boundaries of the social system. For the purposes of this

study, all external environments which are included as part of the system, are perceived as inherently hostile to the goals of the system.

For example, political systems comprise groups of interrelated structures and processes that function to authoritatively allocate values for society. Outputs of the political system are regarded as authoritative value allocations of the system, and such allocations constitute policy (Dye, 1995:38).

The concept of “system” implies an identifiable set of institutions and activities in society that functions to transform demands into authoritative policy decisions requiring support of society as a whole. Systems theory portrays policy as an output of the political system. The concept of system also implies that elements of the system are interrelated, that the system can respond to forces in the environment, and that it will do so to preserve itself (Dye, 1995:38).

Inputs are made into the political system in the form of both demands and support. Demands occur when individuals or groups, in response to real or perceived dysfunctional environmental conditions, act to effect policy. Support is rendered when individuals or groups accept the outcomes of elections, obey the laws, pay their taxes and generally conform to policy decisions. Any system absorbs a variety of demands, some of which conflict with one another. To transform these demands into outputs (public policies), it must arrange settlements on the parties concerned (Dye, 1995:38).

It is conceded that outputs may have a modifying effect on the environment and the demands arising from it, and they may also have an effect on the character of the political system.

The value of the systems model lies in the questions that it proposes (Dye, 1995:39-40), namely:

- ✧ How do environmental inputs affect the character of systems?
- ✧ What are the significant characteristics of systems that enable it to transform demands into policy and preserve itself over time?
- ✧ What are the significant dimensions of the environment that generate demands on systems?
- ✧ How does policy affect, through feedback, the environment and the character of systems?
- ✧ How do environmental inputs affect the contents of policy?
- ✧ How do characteristics of the political system affect the content of policy?

During the conversion phase, the managers will utilise a suitable conversion mechanism to realise the set objectives. By conversion is understood the bringing about of change from a perceived dysfunctional state, to a functional state. Such a conversion phase will be influenced by the external and internal environments to such

an extent that training will take place to a greater or to a lesser degree. If the environmental factors are ignored, detrimental results could lead to stagnation.

Within the above context, the views of Erasmus in Bayat and Meyer (1994:83-101), on the deficiencies of the systems approach as an absolute dogma deserve mentioning. Erasmus in Bayat and Meyer (1994:84), is of the opinion that the systems approach only has real value when viewed in a less reductionist and ideologically predetermined manner.

According to the general systems theory, the typifying characteristics of the relationship between elements of systems is their propensity to maintain or restore a condition of equilibrium among all the elements. This characteristic, according to Erasmus in Bayat and Meyer (1994:88), may contribute to a distorted and possibly an iniquitous view of the world.

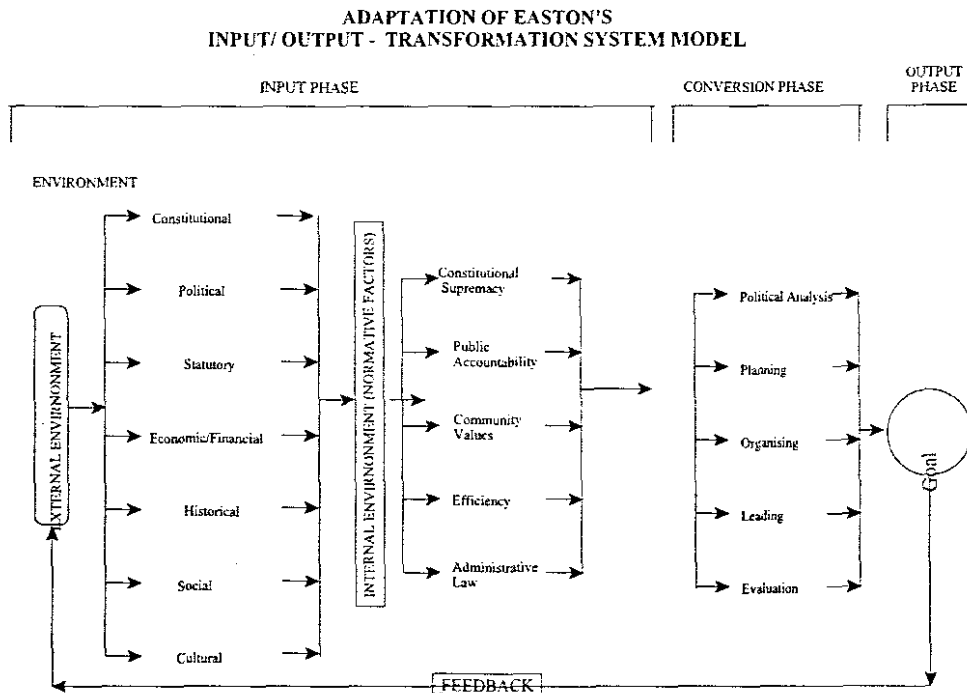
The casual linearity of a process comprising inputs, throughputs, outputs and feedback in dynamic interaction with a discernable environment fits in with the way the empirical world appears to function. In this manner, the systems theory brings hugely complex processes within the cognitive reach of researcher and practitioners. It does so by reducing those processes to a single, predictable, causal unilinear process.

Because the system is assumed to exist, and because it is assumed to have an inherent inclination for equilibrium, the systems theory enables the system, that is public administration, to be readily understood. If one of the elements of the system changes, it is assumed that all the other elements will respond in such a manner that equilibrium within the system will be maintained.

Erasmus in Bayat and Meyer (1994:90), questions the validity of the view that any society consists of several interrelated subsystems and that such subsystems interact within an indeterminate cycle of mutual reciprocity that promotes and enables harmony and overall stability within the system.

Erasmus in Bayat and Meyer (1994:90), substantiates the above view by referring to Minzberg (1983:177), who states that each subsystem pursues its own dynamic ends, to the exclusion of other subsystems. As a result, subsystems often compete with overall systems goals for primacy.

Erasmus in Bayat and Meyer (1994:91-92), accedes that simply because of the existence of assumptions and/or assertions that the systems theory is fallacious should not result in the whole systems approach being rejected. There can be little doubt that systems do exist, and that their elements are integrally related. Systems per se should, however, be viewed with a fundamental conceptualisation and empirically driven consideration of the nature, limits and usefulness of systems theory and its contributing concepts.



The input-output transformational systems model of Easton.

Figure 5

#### 4.2.8 Model for designing training programmes with accompanying evaluation plans

According to Sims (1993:139), whenever evaluation of training is required, the training staff must ensure that objectives are made in terms of clear statements that provide a degree of measurability. Criteria are those specific measures that establish whether or not the objectives are being met. Resources and constraints include, **inter alia**, available finances, personnel, equipment, time and space. The attitudes, norms and values of the organisation towards training, must also be taken into account.

From the possible training evaluation techniques, techniques are selected that are most likely to achieve the objectives of the programme within given constraints and existing resources. This is a “systems analysis” approach applied to developing a training programme evaluation plan (Sims, 1993:140).

According to Sims (1993:141), training personnel should be concerned with developing two major components of a training programme. Firstly, the training content or activities to be included in the programme should be identified. Secondly, an outline or programme for training evaluation should be developed.

The training programme evaluation plan is created by the following:

- ✧ Defining training needs.
- ✧ Deciding which aspects of the training need to be evaluated.
- ✧ Developing the training programme with objectives and criteria clearly defined to enable evaluation.
- ✧ Developing an evaluation plan based on the objectives, criteria and activities of the training programme (Sims, 1993:140-141).

It is essential that the training of learners in tourism be viewed as a matter of priority to facilitate responsible and efficient leadership, not only to the institution, but to the community as a whole. In order to ensure that the training provided to learners in tourism is relevant, and in terms of the new system assigned to tourism disciplines, it

is essential that training evaluation should be conducted on a regular basis. Sims (1993:140), proposes a model for designing training programmes with accompanying evaluation plans and is illustrated in diagram 6.8.

Sims (1993:141), states that the first step in planning training evaluation is determining the purpose for evaluating the programme.

In the above context, Stufflebeam et al (1971:98), propose three purposes for evaluation relevant to training programme evaluation, namely:

- ✧ Evaluation can be used to identify differences in behaviour.
  
- ✧ Individuals or groups may be compared to other individuals or groups, to ideals or standards (as in performance appraisal) or with themselves at different moments in time (a time-series study). This is known as a comparative evaluation.
  
- ✧ Evaluation can investigate causes of behaviour.

The variables within a training programme, responsible for changes within individuals or groups, can be identified through experimental manipulation. This is known as explanatory evaluation.



✧ Evaluation of data correlation.

A predictive analysis can evaluate how well training performance data correlate with other variables such as changes in individual job performance or system performance (Stufflebeam, 1971:98). The purpose for training evaluation will impact each step in developing both the content and evaluation components of the training programme (Sims, 1993:142).

In order to ensure that a training effort attains the objectives for which it was designed, training effectiveness must be measured by the training staff. Providing valid and reliable measures of the training concerns involves what to measure and how to measure.

**4.2.9 A normative model for the training of learners in tourism with specific reference to tourism disciplines.**

A model is an abstraction or representation of political life. Models abstract from the real world in an attempt to simplify, clarify and understand what is important about politics. According to Dye (1995:40-41), the following general criteria are important for evaluating the usefulness of concepts and models:

Order and simplifying reality. The utility of a model lies in its ability to order and simplify political life.

The model that is proposed for the training of learners in tourism is based on Easton's analytical model of transformation of inputs and outputs and Bryson's strategic management model.

The model proposed by Easton (which is also known as the input-output transformation model) emphasises need generation from total external environments (Easton, 1979:29-30). These are known as the "inputs" and examples of the external need generating environments include, **inter alia**, the following:

- ✧ The statutory environment.
- ✧ The technological environment.
- ✧ The educational environment.
- ✧ The social environment.
- ✧ The economic environment; and
- ✧ The political environment.

The process of need satisfaction has to proceed through an internal environment, comprising numerous normative factors of "guidelines and foundations", and which serve as "filters" to maintain norms and standards in terms of the current body politic, community values and legal requirements (Ferreira, 1993:36). The general needs can

be satisfied by the setting of goals, the achieving of which can be considered as the “outputs”.

A conversion process comprising of various management functions or processes follows, in order to enable the institution or organisation faced with the task of satisfying the need, to implement the various steps of the enabling process. According to Ferreira (1993:36), once the need has been satisfied and the goal achieved, feedback occurs to the original environment to check whether the need has been optimally satisfied in accordance with the original goal.

After the goal has been achieved and once feedback has taken place, the original environment will have changed to a new environment, which corresponds with the goal that was set. Unless the newly generated external environment is view as fully functional, this step proceeds to generate new needs that have to be satisfied, and the process of setting goals commences again, perpetuating the action of need satisfaction, cycle after cycle.

Goal achievement or “output”, is dependent on effective and efficient conversion within the context of Easton’s systems model and, in that context, of considerable importance as a major component of the model. Easton’s model (1979:30), provides for a “conversion of demands into outputs” and appears to allow for any suitable enabling (management) process to be utilised for the conversion function. A function-based approach requires the identification of particular management functions as primary units of analysis.

The strategic management model of Bryson (1988) in Willcocks and Harrow (1992:246), emphasises the importance of the strengths, weaknesses, opportunities and threats pertaining to the effectiveness of the organisation. Strategic issues, in terms of Bryson's model, are directly affected by systems and values of the stakeholders.

In terms of Bryson's model (1988), opportunities and threats which could have an impact on strategic issues within the organisation include, **inter alia**, the following:

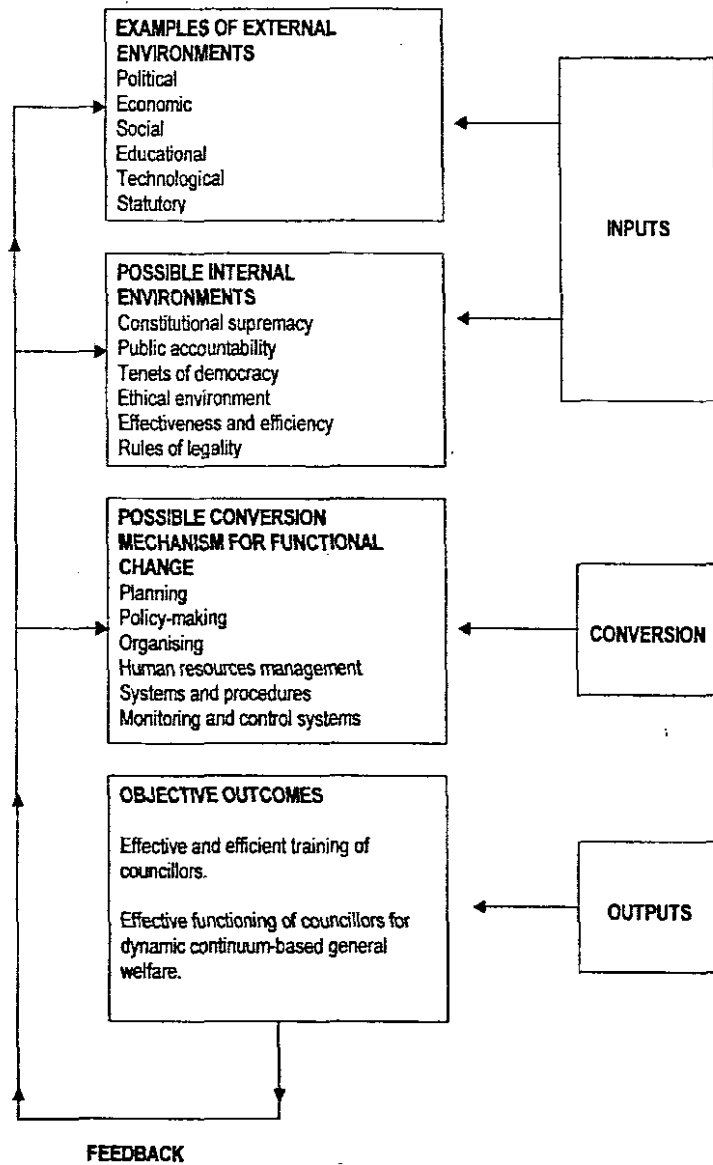
- ✧ Legislation.
- ✧ Socio-economic trends.
- ✧ Demand.
- ✧ Competitive forces; and
- ✧ Collaborative forces.

Strengths and weaknesses which could have an impact on the effectiveness of the organisation (Bryson, 1988), include, **inter alia**, the following:

- ✧ Resources.
- ✧ Skills.
- ✧ Capabilities.

- ✿ Current strategies.
- ✿ Culture.
- ✿ Performance.

Following on the next page is figure 6, representing a normative model for the training of learners in tourism.



#### 4.2.10 Explanation of the normative model

The dynamic response model of a political system of Easton (also known as the analytical input-output transformation model) emphasises need generation from existing dysfunctional external environments. These external environments should be regarded as dysfunctional by nature and therefore hostile to the well-being of the community. Examples are a basically unfriendly environments, which needs goal-setting to change from dysfunctionality to functionality. This is applicable to the tourism education environment, with the great need for tourism education in South Africa and the need to set goals to alleviate that situation. Another example is the political environment, that constantly needs to be redefined in terms of voter interests. There are also the constitutional environment, the statutory environment, the cultural environment, the religious environment, the physical environment and many others. The list is endless. It goes without saying that a perceived dysfunctional "training" environment could be extrapolated as one of the external environments.

What needs to be understood, is that the model presupposes the external environments as being dysfunctional. It is then necessary to set goals to avert potential hazardous situations within given environments and to pursue those goals effectively and efficiently.

The needs generated by the dysfunctional external environments serve as the "inputs" into the system. The generated needs can only be satisfied by goal-setting, the eventual achieving of which will be considered the "outputs".

The process of need satisfaction, which starts with given, perceived dysfunctional external environments, has to move through an internal environment, consisting of different community value systems, ethical foundations and which serve as "filters" to maintain norms and standards in terms of the current body politic, prevailing community values and legal requirements. The process then moves through a conversion mechanism, also known as the management process, consisting of various functions (sub-processes) that have to be utilised in order to enable the conversion from dysfunctionality to functionality to commence via the various steps of the management process. It is noteworthy that the conversion process can have many forms and may consist of many different approaches. The actual nature of the process depends on the particular situation at hand and the preference of the policy makers with regard to determining which particular enabling process to utilise to achieve the desired goal.

After the goal has been achieved and the need accordingly been satisfied, feedback occurs to the original environment to check whether the need has been optimally satisfied.

Should the goal have been achieved, feedback will occur to the original environment (which was the original dysfunctional external environment) and which will now be found to have changed to a new external environment, which, in its turn, will generate new needs that have to be satisfied by goal setting and achieving thereof. An example is a student who arrives at the tertiary institution with a standard ten certificate.

Obviously he or she regards the senior certificate as dysfunctional, hence the application to improve the qualifications to a degree level. Once the degree has been obtained, that qualification becomes a new external educational environment. It is



possible that the student will then regard the degree as dysfunctional for his or her purposes, and a new goal will then be set, that of an honours degree. Should the decision be made to pursue the new goal, the process commences again. Again the existing external environment will be regarded as dysfunctional and will then serve a departure point to achieve the new goal. Again the process will have to proceed through the internal environments (the so-called ethical foundations) that will serve as the watchdog to ensure that the value systems of society have been adhered to in the quest for the goal. Simultaneously, the chosen conversion model will be employed as the enabling process to bring about the necessary change. When the goal is achieved and the honours degree has been obtained, feedback will occur to the previous external environment, which was the original degree, changing it to the honours degree. The process can now start again if it is felt that another, higher qualification is desired and can be repeated infinitely.

The above process takes place for all external environments, depending on the level of improvement that is aspired to. The perceived degree of dysfunctionality in terms of the needs that are generated, coupled with the available resources, will be the deciding factor that will determine the extent of goal-setting, the values and norms that will be adhered to, the conversion process which will be used to change the dysfunctional situation to a functional situation with the concomitant achievement of the goal, with the option of repeating the cycle, as desired.

According to Dye (1995:38), the forces generated in the environment that affect the political system (organisations) are viewed as inputs.

### 4.3 SUMMARY

In this chapter, the need and essentiality of training was explained, model theory was expounded, while a number of models were discussed, for purposes of clarity. A normative model for training was proposed.

Training is regarded as an essential element of growth and development. This issue was explained at length in relation to the tourism industry.

In this chapter, a theoretical approach to describing the training function was followed. An overview of training models was provided, as well as selected theoretical aspects of the training process were examined.

In the next chapter, the growth potential of tourism as a determinant of economic development in South Africa, with particular reference to the Western Cape will be investigated and explained.

## **CHAPTER 5**

### **THE GROWTH POTENTIAL OF TOURISM AS A DETERMINANT OF ECONOMIC DEVELOPMENT IN SOUTH AFRICA, WITH PARTICULAR REFERENCE TO THE WESTERN CAPE**

#### **5.1 INTRODUCTION**

In South Africa, tourism is generally recognised as mechanism that can enhance societal and economic growth, with a particular growth potential. According to WTO forecasts, tourist arrivals worldwide will rise from the 528 million recorded in 1995 to 1,018 million in 2010. While, in the year 2005, the industry will create jobs for 305 million workers and will make up 11.4% of world.

Tourism production worldwide is forecasted to increase to 7.2 trillion dollars in 2005, when jobs in tourism will represent 11.5% of total world employment.

These figures are indicative of the spectacular growth in tourism and its specific weight in the world economy. The demand for human resources in the tourism sector will continue.

#### **5.2 THE DEPARTMENT OF ENVIRONMENTAL AFFAIRS AND TOURISM (DEAT): NATIONAL LEVEL**

According to the Republic of South Africa National Treasury, 2001:550-553), the aim of the tourism programme is to fulfil Government's role in creating, maintaining and enhancing the conditions for responsible tourism and development:

- ✧ Senior public managers are responsible for policy formulation, policy co-ordination and overall management of the tourism programme.
- ✧ Tourism business development leverages financing and facilitates investments in and incentives for tourism.
- ✧ Tourism quality assurance " provides for registration, monitoring and management of tourism products and service providers.
- ✧ Tourism development planning ensures spatial development planning for tourism in the country.
- ✧ Tourism support services create a tourism-friendly nation through communication and awareness programmes.
- ✧ Tourism research and development facilitates and provides regular tourism information to Government and the industry, to assist in decision-making processes.
- ✧ Grant-in-aid provides for Government's participation in the International Tourism and Marketing Strategy.
- ✧ Government's contribution to the South African Tourism Board (SATOUR) is essential for maintaining public sector momentum for tourism.

- ✧ Financial assistance for poverty relief projects aimed at creating infrastructure and jobs and provide training.

### **5.2.1 Policy developments**

The Department of Environmental Affairs and Tourism (DEAT) contributes to growth in the tourism industry through developing human resources, improving safety and promoting provincial and international relations. Tourism has been identified as a key industry for job creation. Through the International Marketing Assistance Scheme, tour operators and business people in the tourism industry receive financial support for attending tourism exhibitions abroad.

### **5.2.2 Expenditure trends**

Tourism dominates spending on the total budget allocation of the Department of Environmental Affairs and Tourism (DEAT). Its share of spending averages 33,8% of the total over the medium term for the year 2000/2001. In 1999/2000, the International Tourism Marketing Strategy received R50 million per year from 2000/2001 to 2003/2004.

Tourism is a fast-growing industry, annually contributing R25 billion to the economy (about 4,9% of gross domestic product). The number of foreign tourists is growing by approximately 12% a year and the value of the industry is expected to grow to R158 billion by 2010 ([www.satsa.co.za](http://www.satsa.co.za))

In the next section, tourism in the Western Cape will be briefly explained, with specific reference to the White Paper on Sustainable Tourism Development and Promotion in the Western Cape (2001).

### **5.2.3 The Department of Economic Development and Tourism (DEDT): Provincial Administration of the Western Cape - White Paper on Sustainable Tourism Development and Promotion in the Western Cape (March 2001)**

According to the South African Tourism Services Association ([www.satsa.co.za](http://www.satsa.co.za)), the Western Cape is one of the premier tourist destinations in South Africa.

The tourism industry in the Western Cape does not function without particular constraints to tourism growth. Those include:

- ✧ Particular security concerns.
- ✧ Inadequate resources and funding.
- ✧ The seasonal market characteristics of the region as a tourism destination.
- ✧ Air travel and infrastructure constraints.
- ✧ The prevalence and dangers of HIV/AIDS.
- ✧ Limited involvement by the previously disadvantaged communities.

✧ Opportunities for increasing the province's share of the domestic and international tourism market include:

- Strategic intervention.
- Increased funding.
- mutually beneficial public sector - private sector partnerships (White Paper on Sustainable Tourism Development and Promotion in the Western Cape 2001).

#### **5.2.3.1 The tourism policy is based on the principles of:**

✧ Social equity.

✧ Environmental integrity.

✧ Economic empowerment.

✧ Co-operation.

✧ Partnerships.

✧ Sustainability

(White Paper on Sustainable Tourism Development and Promotion in the Western Cape 2001).

#### **5.2.3.2 The tourism policy emphasises:**

- ✧ The value of tourism and the importance of facilitating sustainable tourism development.
- ✧ The importance of a style of management that views tourism as a system, that uses co-operation and partnership, and that promotes learning from experience.

#### **5.2.3.3 Key Success Factors include (White Paper on Sustainable Tourism Development and Promotion in the Western Cape 2001):**

- ✧ Meaningful involvement of previously disadvantaged neglected communities.
- ✧ Improved funding for tourism development and destination marketing.
- ✧ Better co-ordination of public tourism resources.
- ✧ A safe and clean environment.
- ✧ Constant innovation in the tourism product portfolio.
- ✧ Improved levels of service, product quality and value for money.



- ✧ Sustainable environmental practices; and dealing effectively with the impact on tourism development of the HIV/AIDS pandemic.

#### 5.2.3.4 The total tourism experience includes:

- ✧ Appropriate tourism products and services that are of direct value to the tourist (activities, attractions and commercial 'plant').
- ✧ Relevant support systems that are in support of the tourism products and services and are indirectly experienced by the tourist. These include:
  - ▣ Service quality levels, for example, human interfaces and operating standards.
  - ▣ Intangibles, for example, safety, environmental integrity and general destination upkeep.
  - ▣ Tourism related infrastructure, for example, public transport, roads.
  - ▣ Utilities, road signs, access to information, energy, water and sanitation.
  - ▣ Communications.
  - ▣ Tourism information networks and systems, for example, information.
  - ▣ Offices, electronic access, market intelligence, planning information.

- Support to SMMEs and emerging business people .

(White Paper on Sustainable Tourism Development and Promotion in the Western Cape 2001).

The White Paper identifies key strategies for providing support systems, developing products, encouraging competition, partnership, collaboration, and marketing. The strategies, listed below, are key considerations for tourism development in the Western Cape.

- ✧ Strategy 5 - invest in tourism skills development and training programmes

There is a shortage of skills in South Africa. Education and training to transfer skills is a key success factor in developing sustainable development of tourism. Educational institutions at all levels have a responsibility to ensuring economic development in the province (White Paper on Sustainable Tourism Development and Promotion in the Western Cape 2001).

- ✧ Strategy 13 - promote entrepreneurship, with special emphasis on neglected communities.

The tourism industry is a vehicle for the development of emerging SMMEs. Major tourism products need to be initiated by provincial and local government and/or the private sector.

- ✧ Strategy 14 - improve participation of local communities in tourism development.

The lack of participation of local communities is a serious obstacle in being able to make the most of the opportunities for economic development, entrepreneurship and job creation. Conscious effort must be made to ensure that such communities have a stake in ensuring the success of tourism development and promotion .

## **5.6 SUMMARY**

This chapter examined the growth potential of tourism as a determinant of economic development in South Africa, with particular reference to the Western Cape. It was pointed out that in South Africa, tourism is generally recognised as suitable for enhancement of societal and economic growth.

Increases in global tourism were pointed out, as well the growth potential for job opportunities in the industry towards 2010.

## CHAPTER 6

### ESTABLISHING COMPETITIVENESS AND IDENTIFYING TRAINING NEEDS AND OPPORTUNITIES FOR THE SOUTH AFRICAN TOURISM INDUSTRY

#### 6.1 INTRODUCTION

The education ministry has declared 2003 the year of Further Education and Training, in recognition of the urgency of developing a sound skills base in the country.

According to Education Minister Kader Asmal

([http://www.southafrica.info/what\\_happening/news/training\\_180203.htm](http://www.southafrica.info/what_happening/news/training_180203.htm)), his department intends to strengthen the supply of skills by building the institutional capacity of the further education and training sector, both in terms of the quality of providing and responding to the human resources needs of the country.

The further education and training sector covers Grades 10-12. According to the Minister, this sector is critical in the skills revolution that started when the Human Resource Development Strategy was launched, and the role played by public should be collectively harnessed to enhance further education and training institutions in the provision of learnerships.

The Minister of Labour, in a speech

([http://www.southafrica.info/what\\_happening/news/training\\_180203.htm](http://www.southafrica.info/what_happening/news/training_180203.htm)), launched a campaign to establish 50 000 learnerships, which was a major undertaking that needs even stronger collaboration between the ministry of Education and that of Labour.

More than 400 new learning programmes have been registered, with about 23 416 workers benefiting from them

([http://www.southafrica.info/what\\_happening/news/training\\_180203.htm](http://www.southafrica.info/what_happening/news/training_180203.htm)).

The learning programmes are facilitated by the 25 Sector Education and Training Authorities (SETAs) that are charged with implementing skills development in various sectors of the economy, including tourism, education, and science and technology, among others, such as the Tourism and Hospitality Education and Training Authority ([http://www.southafrica.info/what\\_happening/news/training\\_180203.htm](http://www.southafrica.info/what_happening/news/training_180203.htm)).

In this chapter, establishing competitiveness and identifying training needs in the the South African tourism industry will be further explained.

## **6.2 THE INFLUENCE OF TOURISM EDUCATION AND TRAINING ON OTHER SECTORS**

Tourism education and training should make the following sub-sectors more competitive:

- ✧ Tourism and Travel Services.
- ✧ Hospitality.
- ✧ Gambling and Lotteries.
- ✧ Conservation and Guiding.

✧ Sport, Recreation and Leisure.

In order to be more competitiveness, implies being cost-effective and sustainable. To do this, education and training must respond to the real needs for human resources, both in the industry and public administration, which means offering quality. Also, while achieving this objective, education and training must be economical and efficient with its resources

([http://www.southafrica.info/what\\_happening/news/training\\_180203.htm](http://www.southafrica.info/what_happening/news/training_180203.htm)).

It is imperative that existing gaps be detected between needs or expectations of employers and tourism professionals on the one hand and the output of educational establishments and systems on the other hand. These gaps must be located on a map of tourism professions, which will provide a model to cater for the complexity of the industry and its human capital needs, both in terms of quantity and quality. The map must include the following dimensions:

- ✧ A sub-sectoral dimension to cover the diverse activities involved (for example, hotels and resorts, food and beverage, transport, distribution, attractions, administration, etc.);
- ✧ A professional dimension to specify the diverse human capital needs (for example, front-line personnel, supervisor, managers, etc.); and a dimension that caters for the geographical and cultural diversity of tourism.

A possible route to follow is the following:

- ✧ An account must be made of the dynamics involved.
- ✧ The identified needs must be dealt with over a time line.
- ✧ A schedule of action must be drawn up, taking into account the steps that must be ordered according to priority and need for systematisation.

The TEDQUAL Methodological Model aims to obtain both training for competitiveness and competitiveness in training, by stressing the need: to adopt a Total Quality methodology in tourism education and training; and for co-operation between industry, educational institutions and tourism authorities (<http://www.world-tourism.org/cgi-bin/>).

The Western Cape has to reach a global competitive level to guarantee that employment and the environment are preserved to protect the best interests of those involved in the tourism sector. The aim must be to safeguard the long-term prosperity of the tourism industry through sustainable development, giving special attention to training human resources in specifically tourism-orientated skills, which will ensure the professionalism of service performance.

Tourism businesses are no longer competing purely against each other, but against other economic sectors. Supply will have to adapt to the needs of the consumer, and consolidate a competitive advantage.

The variables that compose that function of tourism competitiveness can be divided into two main groups (Fayos-Sola, 1994):

- ✧ Those variables that directly affect the consumer's perception of quality, and in the long term, his or her satisfaction, when the consumer experiences immediate interaction with products, services or the environment.
- ✧ Other variables, of an organisational kind, which enable costs to be kept to a minimum and action to be taken efficiently, while maximising the satisfaction given by the first variables.

The design and content of education systems in tourism are subject to environmental pressures, as the human factor constitutes one of the key elements in achieving competitiveness in tourism businesses or regions. Implementing a culture of service quality, by adapting the supply to the customer's expectations, must be done.

The approach to education and training must be based on management for competitiveness. Tourism education and training must attain standards of quality (responding to the real needs of the tourism industry); and efficiency (researching and weighing up the cost-benefits of education and training methods).

### **6.3 A TRAINING APPROACH TO WESTERN CAPE TOURISM AND GROWTH**

(Bayat, MS, 2002. Monitor - research journal of the Faculty of Management, Cape Technikon. Vol 3. Issue 2.)



With three universities, two technikons (soon to be the Cape Peninsula University of Technology), 15 technical colleges, 22 skill training centres and more than 1400 public schools, the Western Cape is better resourced for tourism training than the rest of South Africa (Bayat, MS, 2002. Monitor - research journal of the Faculty of Management, Cape Technikon. Vol 3. Issue 2.) It is estimated that more than a third of all graduates depart from the province after graduation. The Further Education and Training initiative does not meet the demand for vocational skills and the private providers have mostly outdated offerings not linked to current business needs and training standards (Bayat, MS, 2002. Monitor - research journal of the Faculty of Management, Cape Technikon. Vol 3. Issue 2.)

According to Bayat (Monitor:15), the White Paper on Sustainable Tourism Development and Promotion in the Western Cape (March 2002), recently published as a major policy document for tourism development in the Province, is inspiring of a variety of programmes that have their major strengths in the decentralisation of tourism development decisions, making them accessible to all and ensuring that evaluation and effectiveness are in the hands of co-operative governance between the provincial government and local councils (Bayat, MS, 2002. Monitor - research journal of the Faculty of Management, Cape Technikon. Vol 3. Issue 2.).

The Tourism, Hospitality and Sport Education and Training Authority (THETA) can play a vital role in the province, while enforcing its mission and objectives by initiating a series of focussed programmes tailored to the tourism training needs in the province (Bayat, MS, 2002. Monitor - research journal of the Faculty of Management, Cape Technikon. Vol 3. Issue 2.)

The Western Cape Province population borders on 11% of the population of South Africa. The workforce in the province is estimated at approximately 2 million people (both employed and unemployed). The Western Cape's economy contributes in excess of 14% to national Gross Domestic Product (GDP). It is noteworthy that, in spite of the more rapid rising of the province's GDP than the national GDP, the growth rate of the economy is still below the level estimated by the Growth, Employment and Redistribution policy of the national government (GEAR) needed to provide a sustainable basis for effective job creation in the province of the Western Cape.

### **6.3.1 Tourism human resources development: the needs**

The following areas in tourism in the Western Cape will require a bigger and better skilled workforce:

- ✧ Tourist guiding (Culture and Nature and Adventure (Mountaneering) and Nature categories)

The quantity and quality of tourist guides do not always equate with the opportunities and destinations of tourism. If the provincial programmes that foster a more balanced local development succeed, the demand for cultural, environmental and community-driven tourist guiding will increase (Bayat, MS, 2002. Monitor - research journal of the Faculty of Management, Cape Technikon. Vol 3. Issue 2.).

✧ Tour operators (mobile tour operators)

Tour operators (mobile tour operators) are relatively scarce. These operators comprise the small-business component of the tourism industry, which is regarded as vital in the chain of tourism business enterprises.

✧ Growth and increases in the Bed and Breakfast establishments (B & B) and small lodge/guest management enterprises are needed.

✧ Event co-ordination and management

The provincial capacity needs to be increased while a number of the province's mega (large) projects will require increasing skills in the immediate future (Bayat, MS, 2002. Monitor - research journal of the Faculty of Management, Cape Technikon. Vol 3. Issue 2.).

✧ Hospitality

Hospitality will require an increase in the skills level of current employment in previously disadvantaged groups (PDG's), while re-qualification plans for terminations have to be put in place, as well as programmes to uplift management skills will be required.

- ✧ Leisure and resort (including sport activities), conservation, co-ordination and management

This activity is a step forward for the province in terms of its desire to compete internationally. This area will be complemented by the need of not so many but highly competent skills in tourism marketing, destination development and planning.

- ✧ Tourism entrepreneurship.

- ✧ Trainers, facilitators and assessors.

(Bayat, MS, 2002. Monitor - research journal of the Faculty of Management, Cape Technikon. Vol 3. Issue 2.)

### **6.3.2 Tertiary education and training for tourism in the Western Cape**

In Cape Town, the tertiary institutions are the bulk of the provision of tourism education and training in the city. The Cape Technikon, in particular, has a fully fledged faculty that covers tourism and hospitality management courses (Bayat, MS, 2002. Monitor - research journal of the Faculty of Management, Cape Technikon. Vol 3. Issue 2.).

The University of Cape Town has established a post-graduate diploma in Tourism and Leisure Management. The Waterfront Hotel School, managed by the Cape Technikon, trains between 180 and 200 students per year and provides them with high level skills which are acceptable to the Tourism, Hospitality and Sport Education

and Training Authority (Bayat, MS, 2002. Monitor - research journal of the Faculty of Management, Cape Technikon. Vol 3. Issue 2.).

In and around the city of Cape Town, approximately 35 providers of tourism training operate to provide skills for the industry. Half of them provide tour guiding training, about a third provide a variety of training in travel and tourism matters and the remaining 20% address hospitality matters in their training programmes. So-called “moonlighters” and unqualified trainers populate the large number of programmes, including small charitable projects such as B & B’s curio shops and bakeries, in disadvantaged areas as well as basic bread and butter training to communities (Bayat, MS, 2002. Monitor - research journal of the Faculty of Management, Cape Technikon. Vol 3. Issue 2.).

Most of the training mentioned above, particularly in the hospitality industry, is delivered in-house for already employed people. The majority of the hotel companies and their branches are registered as accredited providers with THETA, thereby ensuring that quality training is provided (Bayat, MS, 2002. Monitor - research journal of the Faculty of Management, Cape Technikon. Vol 3. Issue 2.).

### **6.3.3 Constructing a competitive tourism education and training system**

To construct a competitive tourism education and training system, the following steps are necessary ([www.world-tourism.org/education/tedqual/tedqual.htm](http://www.world-tourism.org/education/tedqual/tedqual.htm)):

- ✧ The introduction of Total Quality Management (TQM), based on identifying the needs and expectations of those involved in the system - the employers, the learners and the educators.
- ✧ Analyse how education and training currently provide responses to these needs and expectations.
- ✧ To locate the quality shortfalls.
- ✧ To order the quality shortfalls according to their importance and the cost - effectiveness of investing for their improvement.
- ✧ The tourism education offered by both state and private institutions must pursue its aims through the optimisation of its resources. An analysis of the validity of the methods and processes used, is required.
- ✧ Tourism education and training systems need to adapt to the real needs both present and future - of the tourism sector, and to introduce more efficient methods and processes.

#### **6.3.4 Criteria for a tourism education and training system**

According to criteria established by the WTO (1996), a tourism education and training system must guarantee its competitiveness by observing the following principles:

- ✧ Matching the skills offered during the educational process to the real expectations and needs of demand (external and internal consumers).
- ✧ Offering the tourism training system “just in time”, which means “at the right moment”.
- ✧ Training given too early or too late can produce equally negative results.
- ✧ Guaranteeing individual and collective effectiveness, by bringing the sector's training aims into closer alignment with real needs and expectations.
- ✧ Acquainting those who demand education systems with the results than can really be expected without raising false hopes, which will then be very difficult to satisfy.
- ✧ Guaranteeing maximum efficiency, by optimising the use of resources; and conducting regular quality audits, which will enable the existing deviations to be remedied and the content of education and training programs to be constantly updated.

#### **6.4 DIFFERING PERCEPTIONS IN THE DEMAND FOR TOURISM EDUCATION AND TRAINING SYSTEMS**

To construct a tourism education and training system, it is necessary to take into account the nature of the sector and the multiplicity of the players involved.

The design of curricular contents have to match up to the different expectations in the demand for tourism education systems.

✧ The expectations of education recipients/future employees/learners

Education recipients/future employees/learners are the immediate consumers of the training output. Learners incur its explicit and implicit costs and are actively involved in the education and training process. Although the skills levels of those who embark on tourism training will vary, as will their expectations and demands, learners want to fulfil their ambitions for a long-term career (<http://www.joe.org/joe/2002june/rb4.html>).

✧ The expectations of employers in the (private and public) tourism sector

Employers in the private and public sector are the direct consumers of the skills acquired by students. Employers have the real knowledge of tourism's current demands. Therefore, it is essential that employers are offered a chance to express their real needs, as this will help the research study to reach an accurate definition of the targets to be addressed and the gaps to be bridged (<http://www.joe.org/joe/2002june/rb4.html>).

In terms of time-scale involved, this group's expectations tend to differ from those of the learners. While the learner's aim is to pursue a long-term career, employers are generally looking for short-term answers, which will meet their staff needs in particular areas at a given moment (<http://www.joe.org/joe/2002june/rb4.html>).



## ✧ The expectations of education professionals

The role of education professionals in ensuring educational quality is decisive. However, educators have expectations of the education system - the resources available, tools for the job, the right to freedom of teaching methods, evaluation mechanisms, etc. - and these differ from the expectations of the learners and the employers. Employers emphasise the learner's practical skills, in the expectation that these skills are general and transferable. Educators tend to create tourism-orientated materials of a more theoretical nature. Learners look for quality education, this means, education that responds to their long-term career expectations and adds value to the effort invested in the process. (WTO, 1997:24)

## 6.5 TEDQUAL METHODOLOGICAL MODEL FOR ANALYSING TRAINING NEEDS

Competitiveness means developing business structures that guarantee the profitability of tourism and will sustain it in the long term. Therefore, tourism training must be ([www.world-tourism.org/education/tedqual/tedqual.htm](http://www.world-tourism.org/education/tedqual/tedqual.htm)):

- ✧ Competitive.
- ✧ Adapt to existing needs in the tourism sector.
- ✧ Produce quality.

The main prerequisite for achieving competitiveness is an analysis of the tourism education and training needs of an education system. This analysis is necessary to any education system that aims to offer quality and have a chance for success ([www.world-tourism.org/education/tedqual/tedqual.htm](http://www.world-tourism.org/education/tedqual/tedqual.htm)).

According to Gronroos, 1990; Jones and Lockwood, 1989 and Parasuraman et al., 1985, quality means matching users' perceptions to their prior expectations. When expectations and perceptions coincide, quality exists. However, when they diverge, the results are quality gaps, and the size of the gaps will indicate the degree to which quality is lacking.

The Total Quality Methodology is derived from this basic concept of quality.

The Total Quality Methodology is an attempt to meet the totality of consumer expectations by the complete elimination of the gaps that exist between expectations or needs and perceptions. The word total implies that the concept of quality has a global significance, which is transmitted to the internal level of the organisation concerned ([www.world-tourism.org/education/tedqual/tedqual.htm](http://www.world-tourism.org/education/tedqual/tedqual.htm)).

With Total Quality, the distinction is made between the external or end consumer and the internal consumer. Where Total Quality is concerned, many of those involved are both customer and supplier at the same time. Therefore, for educators, learners are customers in their search for knowledge, while at the same time for employers, learners are the suppliers of acquired skills.

A quality chain is created, which extends right through to the end consumer (in the case of tourism training - the tourism employer). This chain could be broken whenever there is an inability to meet the needs and expectations of the next consumer along the line. In the case of the education system, although quality gaps existed earlier in the process, the tourism employer actually discovers them ([www.world-tourism.org/education/tedqual/tedqual.htm](http://www.world-tourism.org/education/tedqual/tedqual.htm)).

Total Quality is based on the premise that gaps can be avoided before they are produced, by placing the emphasis on prevention and the establishment of systems, which eliminate the possibility of error. This is the concept of right first time. To achieve this we must know the consumers' expectations or needs and the critical factors, which affect their ultimate perception of quality. This involves undertaking regular and systematic research, and getting answers directly from the user concerned ([www.world-tourism.org/education/tedqual/tedqual.htm](http://www.world-tourism.org/education/tedqual/tedqual.htm)).

TEDQUAL aims to contribute to the definition of tourism training needs by using the Total Quality approach ([www.world-tourism.org/education/tedqual/tedqual.htm](http://www.world-tourism.org/education/tedqual/tedqual.htm)).

TEDQUAL methodology can readily be applied to the detection of tourism training gaps from the educators' or learners' point of view. For the purposes of this research, it is the perceptions of the end consumer, the tourism employer, that will provide the most relevant information on training needs in the tourism labour market and ultimately on the major shortcomings of the training currently being offered in the Western Cape.

There will be quality in the training system once the skills, knowledge and abilities of employees meet the previous expectations of employers. If the opposite is true, then there will be a training gap or shortcoming, the significance of which will be indicated by its size.

Quality gaps need to be matched up with specific training areas, so that training output can subsequently be adapted to concrete teaching contents and curricular design ([www.world-tourism.org/education/tedqual/tedqual.htm](http://www.world-tourism.org/education/tedqual/tedqual.htm)).

The rapidly changing macro environment (for example, technology) will affect the growing demand on the labour market for candidates who not only have certain types of knowledge, but who also have an ability to be and to do. The development of these basic skills is what turns a candidate for a particular job into a professional, this means a person who makes a habit or profession of a certain way of working ([www.world-tourism.org/education/tedqual/tedqual.htm](http://www.world-tourism.org/education/tedqual/tedqual.htm)).

The training supply must be adapted to the transferable intellectual abilities, personal attitudes and interpersonal relations tourism businesses are demanding. Rather than bridging the existing gaps between jobs and training by greater specialisation and ad hoc responses, it would seem more sensible to consolidate those types of training that endow future professionals with the basic capacities that will make them employable ([www.world-tourism.org/education/tedqual/tedqual.htm](http://www.world-tourism.org/education/tedqual/tedqual.htm)).

The three training areas, which are essential to any tourism education system, and with regard to which existing gaps must be detected are (Powers et al, 1993):

- ✧ Basic training (knowledge). Knowing is the set of knowledge on the academic curriculum, which can be transferred to the different technical specialities.
- ✧ Technical training (skills). Knowing how to do enables mastery of the skills and techniques specific to each sub-sector of the industry.
- ✧ Personal abilities. Know how to be and behave refers to personal characteristics. These are attitudes that make for effective interpersonal relations and take the form of different types of behaviour.

The role of the THETA accredited assessor is to assess a learner's competence against the unit standards for a skills programme or work based qualification. The assessment process includes the assessment of the learner's skills, knowledge and abilities to determine competency.

The tourism industry includes the following 12 sub-sectors (White Paper on Sustainable Tourism Development and Promotion in the Western Cape (March 2001)):

- ✧ Hotel & Resorts.
- ✧ Travel Agents - Retail.
- ✧ Tour Wholesalers.
- ✧ Tourism Marketing.

- ✧ Cultural Resource Attractions.
- ✧ Natural Resource Attractions.
- ✧ Tourism Administration.
- ✧ Tourism Transportation.
- ✧ Conventions & Events.
- ✧ Attractions and Entertainment.
- ✧ Food & Beverage.
- ✧ Other (consultants, etc).

(White Paper on Sustainable Tourism Development and Promotion in the Western Cape (March 2001).

The 4 professional levels are:

- ✧ Frontline personnel (FLP).
- ✧ Supervisors (SPV).
- ✧ Mid-level management (MLM).

- ✧ High-level management.

(White Paper on Sustainable Tourism Development and Promotion in the Western Cape (March 2001).

In order to reflect the existing situation in tourism, all existing professional levels have been included, accounting for the fact that they will not be present to an equal extent in each geographical area identified.

The 6 geographical areas of the Western Cape are:

- ✧ Cape Town, including South Peninsula, Blaauwberg, City of Tygerberg, Oostenberg and Helderberg.
- ✧ Boland (Winelands and Breede River Valley).
- ✧ West Coast Region including Darling, Dwarskersbos, Hopefield, Langebaan, Paternoster, Saldanha, St. Helena Bay, Veldrift/Laaipek, Vredenburg, Yzerfontein, Swartland & Sandveld: Aurora, Eendek-uil, Elandsbaai, Malmesbury, Mooresburg, Piketberg, Porterville, Redelihuys, Riebeeck-Kasteel, Riebeeck West, Ofifants River Valley: Bitterfontein, Citrusdal, Clanwilliam, Doringbaai/Strandfontein, Graafwater, Klawer, Lamberts Bay, Lutzville, Vartrhynsdorp and Vredendal.
- ✧ Overberg and Breede River Valley, including Arniston, Barrydale, Bot River, Bredasdorp, Caledon, Elim, Gansbaai, Genadendal, Grabouw/Elgin, Greyton,

Hermanus, Kleinmond, UAgulhas, Malgas, Napier, Riversonderend, Stanford, Struisbaai, Suurbrak, Swellendam, Villiersdorp, Ashton, Bonnievale, Ceres, De Dooms, Gouda, McGregor, Montagu, Prince Alfred's Hamlet, Rawsonville, Robertson, Saron, Touwsrivier, Tulbagh, Wolseley and Worcester.

- ✧ Garden Route and Klein Karoo including Albertina, George, Great Brak River, Hartenbos, Heidelberg, Knysna, Mossel Bay, Plettenberg Bay, Riversdale, Sedgefield, Stilbaai, Wilderness and Witsand. Klein Karoo Kannaland, Amalienstein/Zoar, Caltitzdorp, De Rust, Dysseidorp, Haarlem, Ladismith, Oudtshoorn, Uniondale and Vanwyksdorp.
- ✧ Central Karoo, including Beaufort West, Klaarstroom, Laingsburg, Leeu-Gamka, Matjiesfontein, Merweville, Murraysburg, Nelspoort and Prince Albert.

(White Paper on Sustainable Tourism Development and Promotion in the Western Cape (March 2001).

Tourism training requirements will be affected by:

- ✧ Empowerment and participation of previously disadvantaged groups.
- ✧ Cultural factors.
- ✧ Institutional heterogeneity of different tourist areas.
- ✧ The informal tourism sector.



(White Paper on Sustainable Tourism Development and Promotion in the Western Cape (March 2001)).

Training needs in the tourism industry of the Western Cape can be based on the TEDQUAL methodology, as follows:

- ✧ Draw up a map of tourism professions in the region in question. The tourism map must include:
  - The specific 12 industry sub-sectors, which have direct relevance for tourism in that region.
  - The 4 professional levels working in the tourism industry.
  - The 6 geographical areas of the Western Cape.

For the Western Cape, the following have been identified (White Paper on Sustainable Tourism Development and Promotion in the Western Cape (March 2001):

- 12 sub-sectors of tourism activity.
- 4 representative professional levels.
- 6 different geographical areas.

Therefore:

$12 \times 4 \times 6 = 288$  professional niches, divided into 72 business niches ( $12 \times 6$ ) in which each of the existing quality gaps can be specifically defined. This configuration will then enable specification of the tourist enterprises, which can be located in their different business niches and a panel of experts, who are sufficiently representative of tourism activity.

From the above, the priorities and gaps in training can be identified.

## 6.6 DELPHI METHODOLOGY

The Delphi method can be described as a method for structuring a group communication process so that it allows a group of individuals as a whole to deal with a complex problem effectively. It is typically used in the areas of forecasting, broad or long range policy creation and in the development of management strategies ([http://www.tu-harburg.de/tbg/Demos/information\\_delphi\\_method.html](http://www.tu-harburg.de/tbg/Demos/information_delphi_method.html)).

Delphi is a technique for eliciting and refining the group judgements of recognised experts in situations where exact knowledge is not available but where partial information is available at the disposal of the individuals in the group. Although the experts might not know the answer, they do have other relevant information that enables them to make estimates. The integration of individual interviews in a structured and moderated process helps to overcome the uncertainty inherent in complex problems approach the factual developments

([http://www.tu-harburg.de/tbg/Demos/information\\_delphi\\_method.html](http://www.tu-harburg.de/tbg/Demos/information_delphi_method.html)).

#### ✧ The process

In general the Delphi process consists of obtaining individual answers to pre-formulated questions anonymously from the experts, typically by questionnaire, aggregating the answers and feeding them back to the participants. The experts can then modify their response in the light of the findings, and this continues as an iterative process until the group arrives at an agreed response, though not necessarily a single view. This systematic and controlled interactive form of a Delphi exercise is in marked contrast to the informal and 'loose' interaction of traditional round the table face-to-face discussions

([http://www.tu-harburg.de/tbg/Demos/information\\_delphi\\_method.html](http://www.tu-harburg.de/tbg/Demos/information_delphi_method.html).)

#### ✧ Salient aspects of a Delphi process are:

- Anonymity of respondents.
- Iteration and controlled feedback.
- Statistical group response.
- Influence of dominant individuals.
- Consensus orientation.

## ✧ Results

A Delphi exercise, properly conducted, can be a highly motivating environment for the respondents and the novelty of the feedback can be interesting to all. The outcomes do not appear as individual "educated guesses" but as results that are objective or at least commonly agreed upon. Finally, the anonymity of the exercise allows a sharing of responsibility and releases the respondents' inhibitions. It also ensures that individuals are swayed by the arguments and not by their proponents

[http://www.tu-harburg.de/tbg/Demos/information\\_delphi\\_method.html](http://www.tu-harburg.de/tbg/Demos/information_delphi_method.html).

The composition and needs of the tourism industry are in a state of constant flux. Therefore, the behaviour of the training gaps detected will be dynamic. It is important to explore predictable trends in the tourism industry to detect present and future requirements in education and training. The construction of a competitive education system for tourism involves finding long-term answers to demand requirements ([http://www.tourism.co.uk/html/training\\_needs\\_analysis.shtm](http://www.tourism.co.uk/html/training_needs_analysis.shtm)).

The Delphi technique fulfils the aim of the TEDQUAL methodology, as it is based on the future, as a panel of experts make judgements about future contingencies. The Delphi method is qualitative. It systematically combines the knowledge and opinions of a group of experts, by building consensus on the probability of one or more events occurring.

A Delphi process is composed of a number of successive iterative rounds with an established panel of experts. The most relevant information is returned to the panellists with an explanation on the categories and distribution of the answers, so that they can

then give a further opinion on the same issue in later rounds. The aim is to obtain a group opinion (Moutinho & Witt, 1995). The panellists then re-assess their earlier responses, bearing in mind the group's opinion, and give a further response to the problem or to new questions raised by other panellists.

The Delphi process provides information derived from collective wisdom, obtained through a process of data systematisation. Therefore, the proposed research study will use the TEDQUAL method by incorporating several successive rounds with the panel of experts.

#### ✧ Advantages of the Delphi method

##### ■ Scale of research

The size of the panel of experts can be adjusted to suit the resources available and may comprise ten participants to several hundred.

##### ■ Anonymity of the panel. Anonymity minimises the influences of those panellists with a stronger personality.

##### ■ Control of the panel. The Delphi approach permits greater flexibility and control over the election of the participants than other research techniques.

##### ■ The time factor. The length of time required to carry out the Delphi process gives the panellists longer time to think about the issues

analysed and even to consult additional material (Moutinho & Witt, 1995).

- The complexity of the issues analysed. The collective wisdom of the group of experts is a very powerful instrument to bring to bear on complex problems, which would otherwise be very difficult to resolve.

## **6.7 THE FUTURE OF TOURISM HIGHER EDUCATION IN THE WESTERN CAPE**

In the paragraphs that follow, an explanation will be provided of an example in respect of higher education for tourism in the Western Cape. The discussion will commence with the example of tour guiding and alignment with the National Qualifications Framework (NQF).

### **6.7.1 Tourist Guiding and alignment to the NQF**

The Cape Technikon presents its Tourist Guiding module within the framework of the Higher Education syllabus. Simultaneously, the Tourist Guiding module has been aligned to fit in with THETA and DEAT (Cape Technikon prospectus, 2004).

Learners will effectively exit as accredited site guides at NQ17 Level 2, or regional guides at NQ17 Level 4.

NQF Level 2 sites, as defined by the trainer, are City centre walking tour, Cape Peninsula Drive, Cultural Township Tour and the Winelands Tour. Learners need to

prove competency in respect of tourist guiding at the 4 sites (Cape Technikon prospectus, 2004).

NQF Level 4 sites, as defined by the trainer, are Garden Route, Breede River Valley, West Coast and Karoo. Learners need to prove competency in respect of tourist guiding at the 4 sites.

The rationale behind tourist guiding at NQF Level 2 and Level 4 is that the tourist guiding module includes the development of skills, knowledge and abilities that exceed the learners' level of training at NQF Level 2 and NQF Level 4.

Learners will be assessed against the above unit standards and will need to prove competency in the sites, as defined. The modules are based on continuous assessment, which include, **inter alia**, a range of assessment tools, for example, observation, simulation and questioning (Cape Technikon prospectus, 2004).

Learners will exit the course as accredited tourist guides with a skills programme certificate that is recognised by industry. This allows for better access to the travel and tourism job market, specifically tourist guiding. Also, the knowledge, skills and abilities gained, are transferable and will enable learners to work, **inter alia**, in other sectors of the travel and tourism industry, for example, front office, concierge and reservations.

Regarding registration of tourist guides, the national registrar will maintain a tourist guide database and the provincial registrar will undertake the registration function

(White Paper on Sustainable Tourism Development and Promotion in the Western Cape (March 2001)).

### **6.7.2 Re-curriculation and modularisation**

Diversification of current tourism syllabi could be achieved by providing short courses or modules in:

- ✧ Tourist Guiding.
- ✧ Events Management.
- ✧ Tourism and Hospitality Management.
- ✧ Gaming and Gambling.
- ✧ Conservation and Heritage.
- ✧ Sport and Leisure.
- ✧ Recreation, Parks and Amenities.

The above courses would emphasise and enhance specialised skills transference and focused career pathing.



## 6.8 SUGGESTED ROLE OF THE CAPE TECHNIKON

Subject to the impending merger on 1 January 2005 of the Cape Technikon with Peninsula Technikon in Cape Town to form the Cape Peninsula University of Technology, the tourism education is ongoing at the first-mentioned. The Peninsula Technikon does not offer tourism courses (Peninsula Technikon prospectus, 2004) and that function and its concomitant existing expertise in the field of tourism and hospitality training, will, in 2005, become part of the newly constituted university of technology.

In spite of the merger, the Cape Technikon needs to maintain competitiveness with other tertiary institutions and private tourism training operators by producing a quality product of educated tourism diplomates and graduants and whose education in the field contains an element of uniqueness. The key success factors would be:

- ✧ To incorporate the 5 sub-sectors of the tourism industry.
- ✧ To match the needs of tourism employers, employees, the public and private sectors and the community of the Western Cape.

The Cape Technikon, as an education and training institution, could consider the following:

- ✧ Establishment of a THETA Learnership Co-ordinating Agency, which would represent THETA and its activities in the Western Cape. The Learnership

Agency would establish key linkages with Small, Medium and Micro business enterprises (SMMEs), which would act as a catalyst for capacity building.

- ✧ Appointment of dedicated Tourism Learnership Co-ordinators should be considered for them to focus specifically on the Tourism, Sports and Hospitality sub-sectors of the industry, as the future of the tourism industry emphasises skills upgrades of the current workforce.
  
- ✧ Provision of an Information and Research Resource Centre, dedicated to the 5 sub-sectors of the tourism industry. Co-operative learning could provide the human resources, by using students as research assistants.
  
- ✧ Introduction of education and training at lower levels of the NQF, for example:
  - NQF Level 4 Certificate - Tourism: Car Rental.
  
  - NQF Level 4 Certificate - Tourism: Reception.
  
  - NQF Level 4 Certificate - Tourism: Event Support.
  
  - NQF Level 2 Skills Programme - Hospitality: Food Service.
  
  - Assistant.
  
  - NQF Level 2 Skills Programme - Hospitality: Porter.

- NQF Level 2 Certificate - Conservation: Natural Resource.
- Management.,
- NQF Level 2 Certificate - Conservation: Natural Resource.
- Guardianship.

## 6.9 SUMMARY

In this chapter, competitiveness and training needs in the South African tourism industry were explained. Various training methodologies were examined, including TEDQUAL, DELPHI and others.

In the next chapter, a summary of the research report will be provided, recommendations will be proposed and the chapter will be concluded with a number of concluding remarks.

## CHAPTER 7

### RECOMMENDATIONS AND CONCLUDING REMARKS

#### 7.1 INTRODUCTION

The study into an evaluation of tourism training: a conceptual analysis, was undertaken in a climate of expected growth and development of the tourism industry in South Africa in general and in particular in the Western Cape. It is, however, imperative that conceptualisation should exist among policy makers of the factors that determine increase in tourism, the skills levels of tourism workers as well as the facilities and opportunities for training of such workers.

In order to be able to compete globally in the tourism industry, steps must be taken to ensure top quality service in the industry, as well as continual efforts to bring about growth and development in the tourism industry, in order to meet the demands of international tourists and to be able to establish South Africa in general and the Western Cape in particular, as best-choice tourism destinations in a global context.

In order to bring about the above vision and flowing from this research, a number of recommendations are proposed in the paragraphs that follow.

## **7.2 RECOMMENDATIONS AND CONCLUDING REMARKS**

### **✧ RECOMMENDATION 1**

The design of curricular contents have to match up to the different expectations in the demand for tourism education systems.

### **✧ RECOMMENDATION 2**

Employers should be offered a chance to express their real needs, as this will help the research study to reach an accurate definition of the targets to be addressed and the gaps to be bridged.

### **✧ RECOMMENDATION 3**

Tourism training must be:

- Competitive.
- Adapt to existing needs in the tourism sector.
- Produce quality.

### **✧ RECOMMENDATION 4**

The tourism education and training needs of an education system have to be thoroughly analysed. This analysis is necessary for any education system that aims to offer quality and have a chance for success.

#### ✿ RECOMMENDATION 5

Users' perceptions need to be matched to their prior expectations. When expectations and perceptions coincide, quality exists. When they diverge, the results are quality gaps, and the size of the gaps will indicate the degree to which quality is lacking.

#### ✿ RECOMMENDATION 6

Utilisation of the Total Quality Methodology concept in order to meet the totality of consumer expectations by the complete elimination of the gaps that exist between expectations or needs and perceptions. The word total implies that the concept of quality has a global significance, which is transmitted to the internal level of the organisation concerned.

#### ✿ RECOMMENDATION 7

For educators, learners should be regarded as customers in their search for knowledge, which will result in learners, who are the suppliers of acquired skills, will utilise such skills in employment in the tourism industry, to the benefit of the employer, the tourist and the industry as a whole.

#### ✿ RECOMMENDATION 8

A quality chain needs to be created, which extends right through to the end consumer (in the case of tourism training - the tourism employer). This chain could be broken

whenever there is an inability to meet the needs and expectations of the next consumer along the line.

✧ **RECOMMENDATION 9**

Total Quality, based on the premise that gaps can be avoided before they are produced, by placing the emphasis on prevention and the establishment of systems, will largely eliminate the possibility of error. This is the concept of right first time. To achieve this, the consumers' expectations or needs must be studied and the critical factors, which affect their ultimate perception of quality be identified. This involves undertaking regular and systematic research, and getting answers directly from the user concerned.

✧ **RECOMMENDATION 10**

The tourism employer must be involved in a process which will provide the most relevant information on training needs in the tourism labour market and ultimately on the major shortcomings of the current training in the tourism industry.

✧ **RECOMMENDATION 11**

It must be ensured that the skills, knowledge and abilities of employees meet the previous expectations of employers. If the opposite is true, then there will be a training gap or shortcoming, the significance of which will be indicated by its size.

✧ **RECOMMENDATION 12**

Detection of tourism training gaps from the educators' or learners' point of view should be embarked upon and taken note of in order to achieve, maintain and enhance the quality of training, service and overall growth and development of the tourism industry.

✧ **RECOMMENDATION 13**

The training supply must be adapted to the transferable intellectual abilities, personal attitudes and interpersonal relations tourism businesses are demanding. Rather than bridging the existing gaps between jobs and training by greater specialisation and ad hoc responses, it would seem more sensible to consolidate those types of training that endow future professionals with the basic capacities that will make them employable.

✧ **RECOMMENDATION 14**

Identification of three training areas which are essential to any tourism education system, and with regard to which existing gaps must be detected should be undertaken on a priority basis. The three training areas are:

- Basic training (knowledge). Knowing is the set of knowledge on the academic curriculum, which can be transferred to the different technical specialities.
- Technical training (skills). Knowing how to do enables mastery of the skills and techniques specific to each sub-sector of the industry.



- Personal abilities. Knowing how to be and behave refers to personal characteristics. These are attitudes that make for effective interpersonal relations and take the form of different types of behaviour.

#### ✿ **RECOMMENDATION 15**

An immediate gap in research and any available data is an understanding of the existing labour market in the tourism industry. An analysis of the existing labour market in the Western Cape is needed.

#### ✿ **CONCLUDING REMARKS**

The research has shown that various measuring instruments can be applied to identify and develop a training needs analysis of the tourism industry.

The study of determining the gaps between the output of the tourism education and training system and the real demand of tourism employers has shown that the same basic principles as a pilot study commissioned by WTO can be applied when a training needs analysis for training in tourism has to be embarked upon.

The purpose of this research was to undertake an investigation into determining the gaps between the output of the tourism education and training system and the real demand of tourism employers. The investigation was a motivation for the necessary research which is needed in order to determine the gaps and the training needs for the tourism industry.

The report has delineated the issues that need to be considered in order to determine the gaps between the output of the tourism education and training system and the real demand of tourism employers.

- ✧ Chapter one provides an introduction and background to the prospective study.
- ✧ Chapter two explores current issues pertaining to tourism education and training in broad terms.
- ✧ Chapter three embarked on a discussion on tourism education and training in South Africa.
- ✧ Chapter four examined training as a discipline, including an overview of training models.
- ✧ Chapter five explored the growth potential of tourism as a determinant of economic development in South Africa, with particular reference to the Western Cape.
- ✧ Chapter six explained competitiveness and training needs in the South African tourism industry.
- ✧ Chapter seven concluded the study with certain observations, a number of recommendations and concluding statements.

## 8. GLOSSARY OF TERMS

### 8.1 Terminology

#### ✧ Credits

SAQA has adopted a credit system based on one credit equalling 10 notional hours of learning. This refers to the time it would take an average learner to acquire the skills and knowledge required by each unit standard. This time period includes the learning time and the practical time. For a qualification to be registered as a certificate it must have 120 credits and a diploma must have 240 credits (SAQA policy documents).

#### ✧ Demand-led tourism development

Demand-led tourism development is focused on the needs, expectations and wants of the tourist, rather than the suppliers of the tourism product or the supply of the physical infrastructure. Also, see supply-side tourism development.

#### ✧ Emergent SMMEs

Small, medium and micro-sized enterprises owned and/or operated by the previously neglected/disadvantaged population groups that are entering the market.

✧ Frontline personnel (FLP)

Frontline personnel include employees with a high degree of interaction with the customer (waiters, receptionists and other counter staff, porters, etc.)

✧ High-level management (HLM)

High-level management include staff with the authority to make strategic decisions (regional tourism manager, etc.).

✧ Learnerships

THETA and TLP are currently involved in an initiative with the Business Trust in developing learnerships for the 5 tourism sub-sectors. Learnerships consist of on-the-job experience and off-the-job learning. Learnerships require co-ordinated planning, development and implementation. The successful completion of the specified unit standards will enable the learner to achieve a qualification that is registered on the NQF. A Learnership involves an agreement between the learner, the employer and a training provider. All Learnership programmes must be registered with the Department of Labour (DoL). Only a SETA can submit a learnership to DoL for registration.

## ✧ Levels

Unit standards and qualifications will be registered on one of the 8 levels on the NQF according to the complexity of their learning, responsibility and application.

## ✧ Mid-level management

Mid-level management include the staff responsible for the whole department (public relations manager of a hotel, human resources manager).

## ✧ Qualifications

Qualifications are comprised of a number of unit standards. All qualifications are constructed of the following components:

### ✧ Fundamental

Fundamental means the learning that forms the grounding or basis needed to undertake the education, training or further learning required in obtaining a qualification.

### ✧ Core

Core means that compulsory learning required in situations contextually relevant to the particular qualification.

### ✧ Elective

Elective means a selection of additional credits at the level of the NQF specified, from which a choice might be made to ensure that the purpose(s) of the qualification is achieved (Bellis, 2000:90).

### ✧ SETA and ETQA

A SETA is a body consisting of representatives from a particular sector. The key role of a SETA is to ensure that effective education and training takes place. An ETQA is the quality assurance department of the SETA. The ETQA accredits training providers, registers assessors, moderates assessment, certifies learners and maintains a database of achievements.

### ✧ Skills Development Facilitators (SDFs)

The SDFs is responsible for the development and planning of an organisation's skills development strategy for a specific period. This includes the development and implementation of an annual Workplace Skills Plan (WSP) and the submission of an annual training report.

### ✧ Skills Programmes

Skills programmes are small clusterings of unit standards, which enable learners to be recognised for specific jobs. Skills programme credits can assist learners to achieve a qualification over a period of time. Training providers

may offer a variety of skills programmes, which meet the outcomes of the registered standards.

#### ✧ Supervisors (SPV)

Supervisors include those employees in charge of a group of workers.

However, they are not responsible for the whole department.

#### ✧ Supply-side tourism development

Supply-side tourism development is focused on the suppliers of the tourism product (for example, the people, the services and the facilities) and the physical infrastructure, rather than the tourists themselves. Also, see demand-led tourism development.

#### ✧ Unit Standard

Unit standards are a collection of knowledge, skills, and abilities in which a learner must prove competence to gain credits on the NQF. This gives the learner clarity on what he or she is expected to be able to demonstrate, explain and apply.

## 8.2 Acronyms

- ✿ DEAT Department of Economic Affairs, Agriculture and Tourism.
- ✿ DoL Department of Labour.
- ✿ EEA Employment Equity Act.
- ✿ ETQA Education and Training Quality Assurance bodies.
- ✿ GDP Gross Domestic Product.
- ✿ HITB Hospitality Industries Training Board.
- ✿ NQF National Qualifications Framework.
- ✿ RDP Reconstruction and Development Programme.
- ✿ RPL Recognition of Prior Learning.
- ✿ SAQA South African Qualifications Authority.
- ✿ SATI South African Tourism Institute.
- ✿ SDA Skills Development Act<sup>13</sup>. SDF Skills Development Facilitator.



- ✧ SETA Sector Education and Training Authority.
- ✧ SMMEs Small, Medium and Micro Enterprises.
- ✧ SSP Sector Skills Plan.
- ✧ TETASA Travel Industry Education and Training Authority of South Africa.
- ✧ THETA The Tourism, Hospitality and Sport Education and Training Authority.
- ✧ TLP Tourism Learnership Project.
- ✧ WSP Workplace Skills Plan.
- ✧ WTO World Tourism Organisation.

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## 10. ANNEXURE

### A MODEL FOR LEARNERSHIPS

(Website: THETA's Tourism Learnership Project management)

An organisation's Learnership Implementation Plan must serve as a blueprint for the learnership experience. It is a detailed plan of what will be done and why it will be done, and must include the most suitable means by which to achieve the organisation's training objectives. The implementation of Skills Development Interventions needs to ensure:

there is an effective flow to the administration processes;  
the Employment Equity Act is promoted in the workplace; and  
that resources are used so they yield the best possible results.

Remember that the TLP requires, as evidence of sufficient preparation, a documented plan covering the training objectives of the organisation. This plan must be submitted to the TLP before the organisation starts with the implementation of the Learnership.

(Website: THETA's Tourism Learnership Project management)

Manage, Support and Administer the Learnership:

1. Prepare the Workplace
2. Prepare for Learnerships and Skills Programmes
3. Implement the Learnerships and Skills Programmes

(Website: THETA's Tourism Learnership Project management)



The above will provide, if the recommended procedures are followed, an appropriate framework and clear guidelines for achieving the organisation's goals. It should be understood that the process contained within the model has a beginning and a defined end within a specified period of time.

Although procedure relates to both the Employer and the Training Provider, not all the information contained in the Model will be relevant to both parties at all times.

(Website: THETA's Tourism Learnership Project management)

## **PREPARING THE WORKPLACE**

Steps 1 to 12

Ensure HR Management and HR staff are well-informed about skills development strategies. Forms required:

None.

Additional information in this file:

Info sheets:

An overview of legislation I: SAQA and the Skills Development Acts

An overview of legislation II: The Skills Development Levies Act & the Employment Equity Act

Skills levies and grants I: What is the levy and who pays it?

Skills levies and grants II: How are levies allocated & what can be claimed?

(Website: THETA's Tourism Learnership Project management)

Skills levies and grants III: How to apply for mandatory grants

Skills levies and grants IV: How to apply for discretionary grants

Skills Development Contract Brokers and Skills Development Facilitation Agencies

Introducing THETA

Support offered by THETA and the Tourism Learnership Project (TLP)

Contacting the Tourism Learnership Project (TLP)

Guidelines:

#### THE FOLLOWING RELATES TO THE EMPLOYER:

(Website: THETA's Tourism Learnership Project management)

Staff involved in implementing Learnerships and/or skills programmes need to fully understand these skills interventions if they are to properly advise management, co-ordinate the process and guide other stakeholders.

The information in this document, as well as information in the Department of Labour's pack on the Skills Development Strategy, should provide adequate introductory information. Some organisations, however, may have specialist questions that are not covered in either of these sources.

Employers falling under THETA can get additional support in a number of ways. The THETA Call Centre (0860 100 221) is a standard way of finding answers to questions.

(Website: THETA's Tourism Learnership Project management)

(Website: THETA's Tourism Learnership Project management)

It is suggested that before planning the details of implementing Learnerships and skills programmes in the workplace, contact is made with the TLP. This service - intended to promote the quality implementation of skills development in the tourism and hospitality sector – is provided at no charge. (Website: THETA's Tourism Learnership Project management)

Preparing to implement Learnerships or skills programmes in Small and Medium-sized Organisations (SMEs)

Whilst larger established organisations have traditionally been the site for formal workplace training, the new skills development initiatives in South Africa are intended to include staff in small and medium organisations (SMEs). These organisations are less likely to have the infrastructure for workplace training, and, in some cases, may not feel able to take on the detailed planning and logistics entailed in implementing full Learnerships. In this case, an SME should consider implementing skills programmes – a number of which can lead to a full qualification. Skills programmes are shorter, more flexible and can be designed to suit the particular timing and phases of work in the organisation.

Approaches that may help SMEs implement skills development are as follows: forming a consortium of SMEs working in the same region and/or sub-sector could provide a collective infrastructure that makes Learnerships possible.

(Website: THETA's Tourism Learnership Project management)

the loss of time caused by the learner's absence while s/he does the formal learning, which can be quite difficult for small organisations, can be minimized by taking on an unemployed learner at the same time so that s/he can fill the gap when the employed learner is off-the job.

Organisations that implement skills programmes and Learnerships for their own staff in line with the organisation's plans as identified in their Workplace Skills Plan (WSP) – a WSP being a detailed training plan compiled by each organisation and which has been registered with THETA - will be able to claim for the implementation of these skills programmes and Learnerships under their *mandatory grant* simply for having implemented (a part of) their WSP. In addition, there is a *discretionary grant* available for implementing Learnerships both for staff and unemployed people. The discretionary grant is also payable to organisations in the sector that do not pay the skills levy. The forms - and a guide on how to claim these grants - are included under the section of "Forms" in this file. (Website: THETA's Tourism Learnership)

#### THE FOLLOWING RELATES TO TRAINING PROVIDER ORGANISATIONS:

(Website: THETA's Tourism Learnership Project management)

All Training Providers wishing to be contracted by Employer organisations for the provision of training for skills interventions must be accredited with the THETA ETQA (Education and Training Quality Assurer). Information regarding the accreditation process and the documentation required can be found on THETA's website:

(Website: THETA's Tourism Learnership Project management)

This requirement also affects Employers who conduct in-house training for more than 10 learners.

Training Providers must therefore seek accreditation to at least the Phase B level, against which the THETA ETQA, prior to the implementation of the skills intervention, has audited them as 'acceptable'.

#### THE FOLLOWING RELATES TO BOTH THE EMPLOYER AND TRAINING PROVIDER ORGANISATIONS:

The management of a Learnership is the joint responsibility of the Employer and the Training Provider/s. Management structures that will be responsible for the delivery of the Learnership should therefore be put in place before Learnerships are begun.

It is important that there is a contractual relationship between the Employer and Provider/s with common and individual responsibilities being definite, defined and documented. So doing creates an environment wherein the rights, commitments and obligations of each party are unmistakable. Such a step ought to reduce the risk at a later stage of possible misinterpretation that could prove harmful to either the learners or to the entire Learnership.

The implementation of Learnerships must be supported by a positive partnership between Employers, Training Providers and learners. All parties must understand the nature of the relationship, and meetings must be held with all participants prior to the

Implementation so that all parties are aware of their role and when it will come into being.

Because learners will have different levels of learning, and because it may be that not every Employer and every Training Provider is able to provide the facility for every component of the Learnership, it is possible that a variety of work experiences with various Employers and Training Providers will be required. This means that partnerships between a number of Employers and Training Providers will have to be arranged and carefully co-ordinated. This situation serves to emphasise the need for the structured work experience component of the learning experience to be organised well in advance, as it is essential for the learning programme to allow for the achievement of all the specified learning outcomes.

So that the proper combination of the workplace practical experience and the formal facilitation and training component of the Learnerships can take place, the Employer and Training Provider must determine how co-operation between the Training Provider and the Employer will be achieved.

The proposed partnership should specify the procedures to allow for Lead Employers and/or Providers, where there will be more than one Employer or Provider.

At no time should the learner be diverted by the Employer from the structured learning plan. For that reason it is vital that all parties are aware from the outset of the Learnership that the TLP will act against both the Employer and the Training Provider

should a learner be found, during working hours, to be engaged in any activity not directly and immediately related to the structured learning plan.

It is also important that all meetings held between all or any of the parties are minuted, so, if necessary, the matters discussed during these meetings can be referred to later.

To be informed of their responsibilities to the learner, the Employer should read through the following:

**EMPLOYER'S RESPONSIBILITIES:**

The Employer must -

comply with its duties in terms of the Basic Conditions of Employment Act and all applicable legislation

provide the learner with appropriate supervision and training in the work environment to allow the learner to achieve the relevant outcomes required by the Learnership

provide appropriate facilities in accordance with the workplace component of learning

provide the learner with adequate supervision at work

release the learner during normal working hours to attend off-the-job education and facilitation as required by the Learnership Implementation Plan

pay the unemployed learner the agreed learning allowance both while the learner is working for the Employer and while the learner is attending approved off-the-job facilitation

conduct on-the-job [summative] assessment, or cause it to be conducted

advise the learner of the terms and conditions of his or her employment, including the learning allowance if the learner was not in the employment of the Employer at the time of concluding this agreement

be in possession of updated, relevant and enforced workplace policies and procedures apply the same disciplinary, grievance and dispute resolution procedures to the learner as to other employees.

The Training Provider should read through the following so to be aware of their responsibilities to the Learner and Employer.

#### **TRAINING PROVIDER'S RESPONSIBILITIES:**

The Training Provider must -

verify that an adequate number of staff exist and who are able to implement, facilitate, assess and moderate Learnership programmes in accordance with the principles of Outcomes-Based Education

provide education, facilitation and training in terms of the Learnership

provide the learner with guidance and support as required by the Learnership and that relate at least to the following:



have enough clerical posts to co-ordinate the various learning systems and to ensure that timetables and facilities are properly established, communicated and implemented;

provide access to, or make available a mentor to any learner engaged in a Learnership and who is experiencing problems with that Learnership, within a minimum of five days of the problem arising;

employ a Skills Development Facilitator (SDF) who pays attention to all contractual and legal aspects of the Learnerships, as well as all facets of funding and managerial decision-making, and the supervision of clerical staff;

record, monitor and retain details of training and facilitation provided to the learner in terms of the Learnership

conduct off-the-job [formative] assessment in terms of the Learnership, or cause it to be conducted

provide monthly reports on the learner's performance to the Employer.

## Step 2

Agree on a skills development framework and plan with employee representatives.

### **Forms required:**

(Website: THETA's Tourism Learnership Project management)

Workplace Skills Planning Grant - Guidelines and Format 2002/2003

Additional information in this file:

Skills Development levies: new SETA codes.

Info sheets:

Workplace Skills Plans

Benefits for learners: skills development

Skills levies and grants III: How to apply for mandatory grants

An overview of legislation I: SAQA and the Skills Development Acts

An overview of legislation II: The Skills Development Levies Act & the Employment Equity Act

Guidelines:

A set of principles or a framework for skills development must be agreed to with employee representatives or stakeholders within an organisation. The relevant stakeholders within the organisation are likely to be the:

General Manager & Management Team

Heads of Departments

Training Committee / Workplace Forum

Employees

Organised labour

This consultative chain is more likely to be in place within larger organisations. It is also probable that these larger organisations will have in place a Workplace Skills Plan

that allows them to receive skills development grants. Staff or their representatives will, in many cases, have been consulted in the compiling of this plan.

In this situation, these plans then provide a foundation on which details concerning the implementation of Learnerships and skills programmes can be based.

Consult the relevant plan – the organisation's business plan; the Workplace Skills Plan; the Training and Development Plan - for the organisation's employees in order that the skills needs within the organisation are confirmed. This plan ought to ascertain which skills delivery mechanism (a Learnership or a skills programme) would be most appropriate to fill any skills gaps identified through a skills needs analysis having been conducted for each workplace department. Each staff member's capacity in relation to his or her job function would then have been assessed.

It must be kept in mind when identifying the type of Skills Intervention to be used that Learnerships need to capacitate learners to learn independently and that any delivery mechanism used should provide for the learners being able to continue to learn independently and reflect on learning achieved after the skills intervention has ended.

Some additional principles may need to be discussed in order to implement Learnerships and skills programmes - for example, the inclusion of unemployed learners in the workplace.

While some employee representatives will support the development of unemployed people as a contribution to the development of their community, others may regard this

as a threat to opportunities for their members. This scenario will need careful handling, not least because unemployed learners will depend on the employees - many of whom may be union members= for coaching and support.

Where foundational agreements or Workplace Skills Plans are not in place, organisations will need to decide whether to develop these agreements and, or, plans or whether simply to consult staff on the proposed skills development plan. Compile a Workplace Skills Plan / training needs analysis in consultation with employees / employee representatives.

This consultation process could include briefing all employees / employee representatives on skills development legislation, highlighting:  
the benefits for staff/ union members of gaining qualifications;  
the use of the National Qualifications Framework (NQF) as a means of ensuring skills development and employment equity within the organisation.

Explain the Learnership and skills programmes processes, specifically in terms of employed and unemployed learners. Discuss the option of training unemployed learners in addition to staff.

This consultation precedes a more detailed proposal in step 8 – and provides the *foundation for a commitment to skills development.*

Has a justification for participation in Learnerships been made?

Ask:

why the organisation wants to conduct Learnerships

what do the Skills Development Facilitator – the person in the organisation responsible for the development and planning of the organisation's skills development strategy - and the organisation hope to achieve by conducting a Learnership?

what do the Skills Development Facilitator and the organisation intend to achieve through participating in the Learnership programme?

what do the Skills Development Facilitator and the organisation visualize as resulting from participation in the Learnership programme?

what would be the organisation's motivation for taking employed staff / unemployed individuals through a Learnership?

It must be remembered that the purpose of a Learnership is not only to provide a firm base of technical competence, but also to give whatever supporting expertise is necessary to develop the capacity of the learner.

Because all Learnerships must be demand-driven, the organisation's justification should reflect that the participation in Learnerships is in response to specific social or economic challenges facing South Africa in general and the Tourism and Hospitality sector in particular. To indicate that the proposed Skills Development Intervention meets the requirements of the labour market, the intervention should be accompanied by a needs analysis that focuses on real economic needs.

**STEP 3**      Compile a proposal for identified Learnerships and skills programmes.

(Website: THETA's Tourism Learnership Project management)

Forms required:

None.

Additional information in this file:

Qualification matrices (all)

Info sheets:

Learnerships available in the Conservation sub-sector

Learnerships available in the Hospitality sub-sector

Learnerships available in the Tourism sub-sector

Guidelines:

Before approaching management and the employee representatives to gain their commitment to implementing specific Learnerships and skills programmes, identify the kind of programmes, areas of learning and the locations in which they will take place. The kind of programmes, areas of - and locations for - learning will be informed by the needs outlined in a Workplace Skills Plan or a skills development plan, where these exist.

Learnerships and skills programmes are only *methods* by which learners may gain a *qualification*. The choice of which Learnership or skills programmes to implement should be based on the strategic skills needs of the organisation (for example business competitiveness and employment equity), as well as commitments made to employees regarding their development. A match between the skills needed and the Learnerships and skills programmes available will then be a factor in identifying which methods to implement.

### Learnerships available

Learnerships that have been registered by the Department of Labour are:

Conservation Guardianship (NQF 2 = grade 10 / standard 8 level)

Conservation: Fisheries Resource Management (NQF 5 = post-matric level)

Conservation: Terrestrial Resource Management (NQF 5 = post-matric level)

Accommodation Services (NQF 2 = grade 10 / standard 8)

Fast Food Services (NQF 3 = grade 11 / standard 9)

Food & Beverage Services (NQF 4 = matric level)

Professional Cookery (NQF 4 = matric level)

Hospitality Reception (NQF 4 = matric level)

Tourism: Car Rental (NQF 4 = matric level)

Tourism: Event Support (NQF 4 = matric level)

Tourism: Guiding (NQF 2= grade 10 or standard 8 level)

Tourism: Guiding (NQF 4 = matric level)

Tourism: Reception (NQF 4 = matric level)

Brief descriptions of each Learnership in each of the three sub-sectors are given in the info sheets on "Learnerships Available". An updated list of registered Learnerships is available from the THETA Call Centre: 0860 100 221.

When deciding in which Learnership to participate, take the following into account:

*What are the skills requirements within the organisation?*

*What is the capacity of the organisation to implement this Learnership?*

*Does the organisation have the necessary resources, or can the necessary resources be acquired or contracted in?*

(Website: THETA's Tourism Learnership Project management)

For example, it would not be feasible to conduct a Learnership in Professional Cookery if the organisation has never been involved in the Hospitality or Catering Industries nor has the infrastructure (commercial or industrial kitchen and equipment) required to successfully facilitate this Learnership.

Skills programmes available.

Although skills programmes – small collections of unit standards - do not have to be registered with the Department of Labour, it is the responsibility of THETA to choose unit standards that comply with the guidelines for a skills programme.

A list of skills programmes, taken from the qualifications that have been registered with the South African Qualifications Authority (SAQA), will be made available. Details of each qualification are given under the “Additional Information” section.

*Including unemployed learners*

If it has been decided to provide learning opportunities for unemployed learners, these decisions must be included in the proposal. Reasons for training unemployed people include the need for new staff arising from retirements, proposed business expansion or because there is a need for occasional additional staff.

**NB:** The TLP currently provides a discretionary grant for organisations that train unemployed people – but these are only for Learnerships, not for skills programmes.

Details to be included in proposal



Once the Learnerships and skills programmes have been identified, the following details need to be refined before the proposal is ready for consultation:

a motivation of how training in each proposed site can improve the service levels and/or productivity, referring to the organisation's policies, training plans, Employment Equity Plans (including a Workplace Skills Plan) or any Business Plans;

the suitability of each work context for learning to take place;

a description of how the employees who are eventually selected will benefit individually;

an estimate of the number of learners per Learnership and per skills programme; and the inclusion of unemployed learners.

A description of the qualification obtained through the Learnership – including the *unit standards that make up the qualification - could be included. In the case of skills programmes, the unit standards of which the skills programme is comprised could also be included.*

While this may sound rather detailed for this stage, it is preparation for the kind of practical questions that managers and supervisors may ask during initial discussions - and will address some of the concerns that may be raised.

**STEP 4.** Consult line management about the proposed skills development plan.

Forms required:

(Website: THETA's Tourism Learnership Project management)

None.

Additional information in this file:

Info sheets:

Learnerships available in the Conservation sub-sector

Learnerships available in the Hospitality sub-sector

Learnerships available in the Tourism sub-sector

Benefits for Employers: qualifications and Learnerships

Benefits for Employers: skills programmes

Guidelines:

In this step, the proposed plan is checked with the line managers and potential coaches who would be responsible for implementing the Learnerships and skills programmes.

The purpose would be to gain their support, while finding out the suitability and constraints/ opportunities for implementing the Learnerships and skills programmes.

Once the proposed number, type, location etc. of Learnerships and skills programmes to be implemented has been presented, use the opportunity to talk about the roles of the line managers and potential coaches in this initiative.

The following steps may be useful:

Outline the rationale for having Learnerships / skills programmes in their sections / departments, and deal with concerns about disruption, timing, benefits to them etc.

Describe the roles needed for implementing Learnerships and skills programmes.

Identify the proposed roles of individual staff members, and identify any training that may be needed to perform these roles, if the proposal is accepted.

Highlight the potential benefits of acquiring coaching and assessment skills for line managers.

Roles needed for implementing Learnerships (and some skills programmes)

Learnerships and some skills programmes (depending on their nature, location and complexity) require a new set of workplace roles that are unlikely to have been in place before. The extent of the changes necessary in each organisation will partly depend on the existing training infrastructure and the organisation's history of providing in-house training.

The roles required for implementing Learnerships and some skills programmes are:

Skills Development Facilitator who must take overall responsibility for the Learnership Project and who co-ordinates and keeps records of learner progress and assessments. This function will mainly be administrative. Some of the responsibilities of the Skills Development Facilitator will be to ensure that:

each step of the Learnership Implementation Plan is being followed by the relevant stakeholders

identified Trainers and Assessors receive relevant facilitation according to schedule

all Documentation required by THETA and the TLP is completed accurately and sent timeously

they liaise with THETA and the TLP;

**Facilitators** who must be working for an in-house training department or external service Provider who is accredited to offer training toward qualifications;

**Mentors and coaches** who support and guide learners during the learning process both on-the-job and off-the-job, and who must be technically competent (but need not be registered as trainers);

**Learner support personnel** who are responsible for dealing with learners' individual issues – for example, learning difficulties, personal crises such as illness etc.;

**Assessors** who are registered with the ETDPSETA to assess learners in the workplace in aspects of work in which they themselves are competent; and

**Moderators** who will be responsible for quality assuring the learning process internally.

While the additional roles may seem to be substantial at first, they are essential to the success of Learnerships and some skills programmes, and they also present a model for good training practice and management. Organisations implementing a large number of Learnerships and skills programmes may require staff dedicated to this work, while practitioners in smaller organisations may find that they themselves take on a number of roles. In addition, some roles may be outsourced - for example, provision of off-the-job training and assessment.

Criteria need to be agreed for these in-house roles. These could include regulated requirements, and technical competence as well as potential to develop. Most importantly, time implications need to be considered in relation to current job requirements.

It is obviously important to gain management's commitment to Learnerships and skills programmes. Addressing their concerns is central to avoid difficulties arising from lack of buy-in.

If the organisation does not have a Skills Development Facilitator, the TLP will be glad to assist with this briefing. In addition, the TLP may pay for the development of assessors and trainers.

In some organisations, this step may need to take place after Step 5 in which commitment from senior management is obtained.

For example, where line managers do not support training / skills development, it may be necessary to get in-principle support from senior management before consulting with line managers. But where possible, it would be preferable to check the practicality and support for the proposal with line managers first, before consulting with senior management.

**STEP 5. Gain commitment from senior management.**

Forms required:

None.

*Additional information in this file:*

Info sheets:

Benefits for Employers: qualifications and Learnerships

Benefits for Employers: skills programmes

(Website: THETA's Tourism Learnership Project management)

Learnerships available in the Conservation sub-sector

Learnerships available in the Hospitality sub-sector

Learnerships available in the Tourism sub-sector

**Guidelines:**

The approval and support of senior management are critical to the success of the implementation of any workplace education and training programme. Learnerships and skills programmes are no exception.

Ideally, a presentation to senior managers – including departmental heads - in which the proposed Learnerships and skills programmes would take place, should be held.

In planning this presentation, consider the following:

What organisational commitments have already been made with regard to skills development that could provide a point of departure for this proposal?

What business priorities are supported through this proposal?

What factors are generally considered important to the organisation - for example, service improvement, competitive edge, bottom line?

How much do they want to know about the impact on the operation? Will they be anxious at the disruption / down time? How will this be dealt with?

How much may they want to know about Learnerships and skills programmes / skills development?

Depending on their prior interest / knowledge, it may be necessary to market the idea of Learnerships and skills programmes by showing the benefits of the system for the

organisation and staff. Illustrate where the need is and how the proposed Learnerships and skills programmes could contribute to improving factors important to them. If Learnerships for unemployed people are being proposed, motivate this in terms of, for example, a future need to recruit staff in this area.

If management has concerns / objections that require the proposal to be adjusted, it should be done so in ways that build confidence in ongoing skills development.

Finally, decide on what form their final approval for these initiatives should take, and assist them in providing such. This could entail producing minutes or a reminder after meeting with them, or asking them to sign a copy of the proposal. Obviously, whatever action is taken must be in keeping with the style of the organisation.

**STEP 6.** Identify recruitment and selection procedures for employed and unemployed learners.

Forms required:

None.

Additional information in this file:

Info sheet:

Skills development opportunities for unemployed people

Sources for recruiting and selecting unemployed people for Learnerships

Processes for recruiting and selecting unemployed people for Learnerships

Guidelines:

(Website: THETA's Tourism Learnership Project management)

As for the selection for a job or for training, clear criteria for eligibility as well as the processes by which people can gain access to these opportunities must be developed and made available.

### Employees

If the organisation has a Workplace Skills Plan or a Training Plan, employed learners could be identified according to the procedures outlined in these plans.

The organisation's Skills Development Facilitator, along with the relevant stakeholders within the organisation, should therefore already have a list of candidates identified for participation in a Learnership.

If these plans are not in place, or it is necessary to make these opportunities more generally available, consider using the organisation's employee recruitment and selection policies and procedures. (*Agreement on a recruitment and selection process in consultation with employee representatives may need to be reached before embarking on this – see step 8.*)

Steps that could be included in the proposed process are:

refining the criteria and selection process to focus specifically on learners;

identifying any assessment tools to be used in this process;

proposing the composition of selection committees;

identifying the internal communication systems that will be used for advertising these training opportunities;



identifying what needs to be included in any internal advert, such as details of each Learnership / skills programme, any pre-requisite there may be for doing the Learnership / skills programme (for example, a lower qualification), the selection criteria that will be used;  
devising a timeline for the process; and  
a briefing for interested applicants.

### Unemployed people

The organisation may wish to identify currently unemployed individuals and place them on a Learnership.

As unemployed learners will depend on existing staff for support within the working and learning environment, it is strongly advised that skills development opportunities are first made available to employed people, before a programme for unemployed people is implemented.

Ideally, the decision to include unemployed people should comply with the strategic needs of the organisation or sub-sector. For instance, consider creating a pool of people from whom to recruit, because there is always a need for skilled occasional labour; retirements tend to be imminent; it is a growth area within the organisation, as examples.

The organisation would do well, at this point; to take into consideration it's current equity status as well as its future equity objectives.

Also to be borne in mind are the targets set by the National Skills Development Strategy and the Human Resource Development Strategy.

Inform the workforce of the decision to recruit unemployed individuals. Again, engage with the relevant stakeholders in the organisation so that all parties within the organisation are satisfied with the conditions around which the unemployed individuals will be incorporated into the workforce.

The inclusion of unemployed individuals into the organisation should not be, nor should be seen to be, a threat to the employed workers.

Recruiting and selecting unemployed people for Learnerships and skills programmes can be done in various ways:

re-visit existing retrenchment lists;

selecting learners from a pool of casual employees;

consulting with the Employment Services section of the Department of Labour (DoL).

Depending on the strategy chosen, either:

negotiate a selection process for retrenched staff with the employee representatives;

use the process proposed for employed learners for selecting learners from amongst casual staff; or

consult with the regional Department of Labour.

If the aim were to recruit individuals who are currently unemployed, the most favoured route would be to contact the local branch of the Department of Labour. DoL has a database of unemployed individuals for whom a need for skills development has been identified.

### Selection Procedures

(Website: THETA's Tourism Learnership Project management)

Allow in the planning process for time to select, interview and allocate potential learners.

The selection process must be transparent, prudently thought through and well documented. The criteria used in the construction of the selection process must be carefully considered and precisely documented and must be unbiased.

Discuss with the Department of Labour at Head Office [Pretoria] level the type of Learnership the organisation intends to offer, and request their assistance with the recruitment and screening process of the unemployed.

A psychometric assessment tool available free of charge from the Department of Labour, to organisations wishing to ascertain the capabilities of unemployed individuals, is the Situation-specific Evaluation Expert (SpEEEx).

A generic battery of SpEEEx assessment scales that has proved highly effective in *selecting candidates for Learnerships in kwaZulu-Natal* is:

SpEEEx 100 – (spatial and abstract) conceptualisation

SpEEEx 302 – calculations

SpEEEx 502 – assembling

SpEEEx 1600 – reading comprehension

SpEEEx 2502 – linguistic proficiency.

SpEEEx 1700 (listening potential) may be included if time allows.

The basic education level for Learnerships is ABET Level 3 - aligned to standard 8 / grade 10. This factor should be considered when applying the above scales.

(Website: THETA's Tourism Learnership Project management)

Info sheets on recruiting and selecting unemployed people (in the “Additional Information” section) give additional details of sources and processes for accessing these learners.

**STEP 7.**      *Develop dispute mechanisms for parties involved in Learnerships & skills programmes.*

Forms required:

None.

Additional information in this file:

None.

Guidelines:

Identify any potential areas for dispute not already covered in the organisation's existing organisational dispute resolution mechanisms and propose they be added to the agreed policies and procedures. Where applicable, these additions must be agreed to by employee representatives.

If no dispute resolution mechanism exists, an appropriate forum should be mandated to develop such a mechanism, for example, a workplace or employee consultative forum.

(If a mechanism is not developed and a dispute arises which is not resolved, the matter should be referred to the CCMA (Commission for Conciliation, Mediation and

Arbitration). This is also the route for disputes that fail to be resolved through the use of the organisation's mechanisms and policies.)

STEP 8. Agree to proposed skills development plan and conditions with employee representatives.

Forms required:

None.

Additional information in this file:

None.

Guidelines:

Most employee representatives are concerned with the development and employability of their members. While Learnerships and skills programmes undoubtedly support this interest, employee representatives may have concerns about some aspects of Learnerships and skills programmes, particularly the detail of how they will be implemented in their workplace. They may more readily support these initiatives if their concerns are addressed and possible difficulties recognised. This will also alert those implementing skills development to possible pitfalls.

Discuss the detailed proposal and implementation process with the employee representatives, including how employed learners will be identified / recruited.

Clarify how it will affect staff in terms of workload, time off, expectations around promotion, additional costs etc.

(Website: THETA's Tourism Learnership Project management)

Address related issues that may cause concern. These could include:

recognizing prior learning,

language requirements (if they exist),

concern about second/ other language ability,

*the relationship between qualifications and (increased) pay levels,*

individual employee anxieties, for example, anxiety about "going back to study" after not having done so for a long time, and/or apprehension about assessment.

Where possible, align skills development implementation to existing agreed human resources development / training policies and procedures. Where these do not exist, authorize the appropriate forum to resolve these issues accordingly.

Where it has been agreed that unemployed learners will be placed, the selection process for these learners, as well as the period and location of employment, need to be made known to existing staff.

It is far more important to clarify issues now than deal with them during the course of Learnerships and skills programmes, when learning programmes and arrangements could be badly disrupted.

**STEP 9.** Finalise the number and sites of Learnerships and skills programmes and the numbers of learners.

Forms required:

None.

*Additional information in this file:*

None.

Guidelines:

In the event that an organisation has the option of a number of different sites for each Learnership / skills programme, *finalise those best suited to implementing the learning programmes.*

Consider:

the issues raised in consultation with senior and line managers and with the employee representatives;

circumstances in each site that may inform timing and general suitability, for example, *new manager starting; high turnover of staff; introduction of new systems or equipment etc.*

available resources (people; office space; equipment etc.), especially the availability and capacity of mentors.

When deciding on the numbers of learners - both employed and unemployed - remember to cluster a number of learners into a Learnership or skills programme where this is useful. *Also consider grouping learners with other Employers or Providers. Discuss this option with the TLP.*

Confirm the plan and its timing with the affected line managers and employee representatives (if necessary) – and adjust the proposal accordingly.

THE FOLLOWING RELATES TO BOTH THE EMPLOYER AND TRAINING PROVIDER:

Use the form: Site Evaluation Check on page 1 of Templates in this document to assist in inspecting the facilities of any additional site/s.

This form, as it stands, relates to Hospitality qualifications only. Revise it to reflect any requirements should it be necessary to use it for Tourism qualifications.

When the learners have been identified, and it is known how many learners will be following which qualification, calculate whether it will be more practical to have the learners travel in to a central point for facilitation [this may be suitable for an urban or peri-urban area], or whether the facilitators should travel out to the learners [which may need to happen in rural and deep-rural areas].

Regard the following table as if it was representative of a learner sample for one Employer.

The learners have first been classified into geographical or site areas.

Each classified group has then been sorted into the qualifications offered.

A method of differentiating between the employed and unemployed learner – in this example, the [e] identifies the employed learner, has been used.

Lastly, a register to ascertain how many learners wish to follow which qualification has been compiled.



Across the province, this Employer has a need to offer Accommodation Services to 3 learners; Hospitality Reception to 1 learner; Professional Cookery to 2 learners; Fast Food Service to 1 learner; Food & Beverage Services to 1 learner, and Guiding at level 2 to 2 learners.

If the services of an external Training Provider will be contracted in, the Training Provider must ascertain the need, in the rural areas, for their Facilitators (and possibly also Assessors) to travel to the learners. Should the necessary training amenities not be present at any one locality, it might then be necessary for the learners from that area to travel to another area that does have what is required.

Regardless of whether the facilitators / assessors must travel out or not, a plan should be made of what unit standards the facilitators will facilitate, and when, and where.

It may be feasible to have the Drakensberg learner to travel to the Midlands for facilitation, or for the Midlands learner to travel to Durban, with the Drakensberg learner remaining in the Drakensberg with the facilitator travelling out.

Within the South Coast region, consider whether the learners will come to one central facilitation point, or if there is a need for more than one facilitation point. The same consideration can be applied to the North Coast area.

Should facilitation take place at a central node, for example Durban Central, it may be necessary to plan along the lines of learners following:

STEP 10 Identify external Training Providers, and assessors, if necessary.

Forms required:

See THETA website for the Accreditation Application.

Additional information in this file:

None.

Guidelines:

Training and assessment related to qualifications may only be provided by departments or organisations accredited by THETA to do so. Training and assessment can then either be a function of the Human Resources Department / Training Department within the organisation, or can be outsourced to an external Training Provider.

If the Employer is not the Provider - i.e. the Employer does not have an established training department or function - contact the TLP to receive a list of accredited Providers from whom to choose.

If the Employer has an established training department or function which is not yet accredited, refer to the THETA website for the accreditation and registration of assessors and Providers.

THE FOLLOWING RELATES TO BOTH THE EMPLOYER AND THE TRAINING PROVIDER:

(Website: THETA's Tourism Learnership Project management)

On the next two pages are structured breakdowns of aspects of the unit standards common to the Guiding and the Hospitality Learnerships.

This will assist when identifying how many and which facilitators and assessors will take responsibility for the facilitation and assessing of these common units standards.

Taking TGC02 and TGC04 from the Tourism Learnerships as an example, identify which of the unit standards will be needed:

#### Identification of assessors

If the Assessors are not current members of staff, it is not advisable to recruit them until the Implementation time has been identified and the organisation has met all the criteria from THETA. Should recruitment take place ahead of time, it may be that unnecessary salaries will have to be paid until these people are actually needed.

However, bear in mind that assessors must be technically competent in the area/s in which they will be required to assess.

First determine the requirements of the qualification being offered and then source assessors who have the technical competence to assess the specific outcomes for each particular Learnership.

Assessors can also be facilitators – in fact, this is recommended. However, it must be noted that for purposes of Quality Management, a facilitator should not be permitted to

assess, in the summative assessment stage, learners they have facilitated. To allow this to happen would mean a total compromise of the organisation's Quality Systems.

All individuals wishing to assess must be a licensed assessor through the ETDPSETA and must be registered with the THETA ETQA.

Individuals wishing to act in an assessment capacity need to have been assessed as competent against ASSMT01 plus any one of:

Facilitate using a variety of Methodologies

Recognition of Prior Learning

Coach a Learner

Design and Develop Assessment Tools

Every Assessor needs to be able to plan for assessment because assessment is an integral part of the full planning process in OBE. Any assessor will understand the following structure and should be able to provide clarity on the following points:

what phase and grade is being dealt with

accordingly, what type of learner is being dealt with

what is the Learning Programme under consideration

how will the Learning Programme reflect on the assessment demands

which Critical Outcomes will be engaged

which Life Role is involved

what Capability Task will be best suited to express the critical outcome/s

what specific outcomes will be worked with during the Capability Task

what Resource Tasks will therefore need to be developed

Best Practice dictates that the learner is given the opportunity to nominate from the pool who they would like to be their assessor. It is not for the Facilitator nor the Assessor nor the Training Provider to dictate to the learner who their assessor will be. It is not advisable, from a Quality Management aspect, that a person summatively assess unit standards they have themselves facilitated.

Assessment Management Plan:

The Learning plan must show that both formative and summative assessment is provided for and must also detail and prescribe how assessment will take place.

It must also explain what integrated assessment is required, where integrated assessment is understood to refer not only assessing the learners' abilities to integrate different elements of competence, but also to assessing the learners' abilities to integrate work experience with other learning.

Each organisation offering a Learnership programme must therefore have an assessment plan detailing how the assessment process for each Learnership has been planned and how the assessment process will be conducted.

Respond to the following questions to ensure that the organisation has put in place the necessary planning to enable assessments to be conducted:

who will be conducting the assessments?

Do the individuals identified to conduct assessments have the necessary experience within the areas they are expected to conduct assessments;

do the individuals identified to conduct assessments have the necessary assessor qualification (ASSMT01 plus any one other from the list above);

does the assessor have the necessary qualification should the assessor be required to coach a learner;

Does the assessor have the necessary qualification should the assessor be required to RPL learners?

How and when will assessments take place?

What assessment tools have been planned for use in assessments?

do these assessment tools include assessing the critical cross-field outcomes?

Are the assessments integrated across unit standards?

What formative assessment strategy has been planned?

What summative assessment strategy has been planned?

Who is responsible for conducting the summative assessments?

Do these individuals have the necessary qualifications to conduct summative assessments?

How has the organisation ensured that the assessment process is standardised across different assessors, certifying the equality of the assessment across all assessors?

Has the assessment strategy been explained to the learner in unambiguous terms?

Does the learner have a clear understanding of how the assessments will take place;

Does the learner have a clear understanding of when the assessments will be taking place?

Does the employer understand the assessment strategy?

Does the Employer agree with the Assessment strategy?

Does the Employer have a clear understanding of how the assessments will take place;

Does the Employer have a clear understanding of when the assessments will be taking place?

Does the Training Provider have a clear understanding of how the assessments will take place;

Does the Training Provider have a clear understanding of when the assessments will be taking place?

Does the Training Provider understand the assessment strategy?

Does the Training Provider agree with the Assessment strategy?

What is the assessment dispute resolution mechanism?

Does the organisation have such a procedure in place;

Is the learner aware of this procedure;

Has the assessment dispute resolution been explained to the learner in clear and unambiguous language?

Identification of providers and/or facilitators?

It is extremely important for the Employer to ascertain that the Provider complies with the requirements of the THETA ETQA and has a proven and successful track record in facilitating the type of training they will be called upon to provide.

The Provider must be able to deliver what is required of them at the time it is required and according to the criteria of each unit standard.

(Website: THETA's Tourism Learnership Project management)

Employers should first determine the requirements of the qualification on offer, and then source Training Providers with the technical competence to deliver the prerequisite for each specific Learnership.

Just as it is not advisable for the Employer to contract a Training Provider until the time of Implementation has been identified and all the criteria from the TLP and THETA has been met by the organisation, nor is it advisable that the Training Provider recruit facilitators until a need is identified. Should recruitment happen ahead of time it may be that salaries will have to be paid unnecessarily.

Training Providers should have already ensured that their facilitators have the technical competence to deliver the prerequisite for each specific Learnership with which they may be involved.

It is vital that individuals identified as facilitators have undergone relevant training in Facilitation. Techniques that the facilitator must use include:

the seeking and drawing out of information and opinion from the learner

active attending and listening

reflection / clarification / elaboration

paraphrasing / summarising

self-disclosure

being open, adaptive and flexible

controlling time

group member's responsibilities

**STEP 11.** Design Implementation Plan, including timeframes.

(Website: THETA's Tourism Learnership Project management)



Implementation Planning guide.

Guidelines:

Has a communication strategy been developed? As the Learnership moves through the different stages of implementation, various aspects of the implementation process will need to be communicated to different people in, and sectors of, the organisation.

The Skills Development Facilitator will need to have identified who will be responsible for communicating what information to whom and by when.

The Employer must produce an Implementation Plan in conjunction with the contracted Training Provider and the line managers within whose departments Learnerships and skills programmes will be implemented.

The Plan should include the timing of all the stages prior to the start of the actual learning programme, as well as an idea of how the learning programme itself will be implemented. Critical points in the next 18 months that would affect the implementation of Learnerships and skills programmes (for example, a very busy time when on-the-job training is impossible to do) should be identified and worked around.

Note that some stages may take longer to carry out than is predicted – for example, the recruitment process, if the organisation needs to advertise – and it is obviously important to allow enough time so that the learning programme is not disrupted unnecessarily once it has started.

(Website: THETA's Tourism Learnership Project management)

Use the 12-month time frame as a basis for Learnerships.

Recognition of prior learning (RPL) processes, as well as the needs and abilities of individual learners, will either speed the timeframe up or slow it down. (An average of 12 credits needs to be completed – facilitated, proper workplace experience undertaken, and assessment of full competence gained - per month over a twelve-month period in order to achieve a full qualification. The same guideline would apply to a skills programme comprising 30 credits, i.e. approximately three months to complete.)

The following pages provide a directive as to what is required in a Learnership Implementation Plan.

When assembling the organisation's Plans, make use of the examples that are supplied as a guide throughout the subsequent pages.

It is recommended by the TLP, for purposes of standardisation, that the templates used in these pages be adhered to when compiling the organisation's Plan.

**THIS RELATES TO BOTH THE EMPLOYER AND TRAINING PROVIDER:**

The learning plan should contain the following:

a progression from the simple to more challenging responsibilities

instances for a more universal vision on the part of a learner

It is very important that the outcomes of the Learnership are logically defined within the learning plans. The outcomes should identify the standards to be achieved as well as the methods used to do so.

A separate learning plan must be developed for each Learnership on how and when and where the Theoretical Learning is conducted. Workplace Learning must also follow a structured plan.

The Learning Plan must be a carefully researched and documented strategy.

It would be in the Employer's best interest, for audit purposes, to request the necessary documentation from the Training Provider.

Working towards compiling a Learning Plan:

#### STAGE 1:

Compile a comprehensive budget.

When compiling the budget and allocating costs that may be incurred through implementing a Learnership, consider the following 3 stages:

Planning:                      4 months

Implementation:      12 months

Wrap up:                      3 months

Each of the above stages will require careful budgeting and distribution of funds.

## STAGE 2:

Regard the Learnership as a whole. That is, look at all the unit standards that comprise the Learnership, the number of credits that are involved as well as the level at which those credits are aimed.

Bearing in mind that 1 credit equals 10 notional hours and taking into account the nature of each particular unit standard (does it have a high theoretical, or practical, bias?), group unit standards together in a way that will allow for:

a logical flow to the Learnership, with most of the fundamental unit standards completed before the core unit standards, and most of the core unit standards being completed before the electives,

a reasonable pattern of facilitation with unit standards having similar, or the same, specific outcomes being clustered together, and a well-structured plan for integrated assessment.

Remember that workplace experience plays a major role in Outcomes Based Education (OBE), so it is very important to allow the learner to put into practice, with as little delay as possible, what has just been facilitated.

## STAGE 3:

Bring together the unit standards that have been sorted according to the guidelines above and divide them into a suitable number of time periods.

(Website: THETA's Tourism Learnership Project management)

STAGE 4:

Calculate the number of days it will take to facilitate the total number of credits for each of the periods.

Also calculate the amount of time that then remains to allow for both the workplace experience and for assessment.

Consider the following example, taking into regard, as is done in this example, the number of hours of facilitation per group per day and the ratio of theoretical facilitation versus practical work experience that will be allowed for each group.

Here is an example of a Learning Plan: (This example will relate to subsequent examples). This example illustrates how to draw up the organisation-specific model and to calculate how much time is required to facilitate, allowed for workplace experience, and for assessment.

Do not regard it as a suitable working template for the Accommodation Services qualification.

NOTE:

the calculations at the end of each table. These show how many days it will take to facilitate the total number of credits for the period, as well as the amount of time that then remains to allow for both the workplace experience and assessment.

not all the calculations use the same values for determining these totals. In some instances a 7-hour facilitation day has been allowed for, whereas in other tables a 5 or 6-hour day has been provided. Some tables use a ratio of 25 facilitation : 75 practical experience whereas other tables allow for a ratio of 30 : 70 or 15 : 85 or 45 : 55.

that the Learner must cover all of the listed units for each period.

The Assessor must assess these same units, check the learner's manual is up to date and sign off completed units in the manual.

#### STAGE 5:

Divide the learners into groups / clusters / Employer sites. The number of groups chosen will depend on the number of learners participating in each Learnership, or on the geographical spread of the learners.

At this stage it may not be possible to distinguish which learners will progress through the Learnership quicker than other learners.

Remember that faster learners must not be slowed down by slower learners, and that the slower learners must not be put at risk by having to work at the speed of the faster learners.

The initial groupings should therefore be considered as starter-groups only, and indeed, these groups ought not remain static for any length of time; 4 groups have been used in for the sake of this example.

## STAGE 6:

The next step is to work out, for each of the number of groups / clusters / Employer sites into which the learners have been divided, the actual dates for facilitation for each unit standard, and link this date to a date for the workplace practical experience.

The workplace experience must take place as soon as possible after the facilitation of *the unit standard*.

The purpose of Outcomes Based Education is defeated if the learner is only able to access the workplace at irregular and, or, widely spaced intervals. The reinforcement of the theoretical learning via practical experience does not happen if long periods of time occur between facilitation and the practical work experience.

Facilitation should take place in blocks of 4 hours, with the practical experience following directly after. Although this configuration may not be possible at all times, it most certainly must be the structure around which the learning pattern is formed for the majority of the learning.

The Employer and Training Provider need to formulate a plan that does not disrupt the smooth functioning of the workplace, but that also allows for the Training Provider to regularly facilitate the learners.

#### STAGE 7:

The dates for integrated assessment, against clusters of unit standards or a variety of selected specific outcomes from various unit standards, ought to be scheduled as near as possible to the end of the practical experience that is related to the specific outcomes concerned, so assessment can happen in an integrated manner.

Not every learner will achieve competence against the specific outcomes or a complete unit standard the first time they are assessed against those specific outcomes or that unit standard – allow for this when planning for assessment.

Also remember that assessment is a time-consuming activity, especially when conducted properly. It is advisable, in planning for assessment, to allow for extra time so the learner is able to achieve competence without feeling pressurised.

#### STAGE 8:

Now that information has been gathered on  
who the learners are,  
where the learners are situated,  
whether they will travel in to a central point for facilitation, or the facilitator will  
travel out to the learner,  
and if multi-site learning will take place,

Here is a brief recap of what has been achieved thus far:  
learners have been allocated



qualifications have been identified and common unit standards grouped  
the structure of a Learning Plan is in place, detailing how long it will take to facilitate  
what unit standards and how much time is then required for workplace experience and  
the assessment process

actual facilitation dates have been planned

actual workplace practical dates have been planned

proposed workplace assessment dates have been planned

the framework of a Learning Plan for an Individual Learner has been initiated

a simple Progress Chart for an individual Learner has been compiled

#### Guidelines:

Advise all stakeholders - namely management, employee representatives and staff -  
of:

the Learnerships and skills programmes to be implemented and the number of  
employed and unemployed learners identified for each;

the implementation plan including a detailed timeline;

the recruitment and selection procedures for employed and unemployed learners;

any supporting policies and procedures for example grievances, conditions of  
employment etc. that may be useful for them to know.

Briefings for employees / employee representatives should particularly be held in work areas or at levels at which the Learnerships and skills programmes are proposed. They could include explanations of:

the Skills Development Strategy, SAQA and other related legislation;

what Learnerships and skills programmes are and why they have been developed;

the benefits for employees of doing Learnerships and skills programmes - and qualifications generally;

intentions of including unemployed learners;

how Learnerships and skills programmes should be implemented; and

the importance of Learnership agreements and employment contracts.

While Learnerships and skills programmes may provide advantages to individual employees, there are likely to be a set of concerns - possibly expressed in consultations with employee representatives - which can be addressed in these sessions.

## PREPARING FOR LEARNERSHIPS AND SKILLS PROGRAMMES

### Steps 13 to 24

**STEP 13.** Identify and brief potential on-the-job coaches and assessors in each skills development site in the workplace.

Forms required:

None.

Additional information in this file:

None.

Guidelines:

As mentioned in Step 4, coaches, mentors and assessors are roles that facilitate the implementation of the learning programme in the workplace.

Where these roles are undertaken by staff, individuals should be finally selected in consultation with line managers and employee representatives. The skills and personality needed for this work – as well as the ability to add this to their job descriptions – must be taken into consideration when choosing people for these roles. In addition, they must be willing and able to attend training to assist them to enact these roles competently.

Review the implementation plans with them and explore with the line managers and potential role players:

how these roles would impact on their current jobs, and  
what the practical implications are, in terms of time commitments.

Remember that assessors must be *technically competent* in the area/s in which they are required to assess.

First determine the requirements of the Learnership being offered and then identify individuals who have the technical competence to assess the specific outcomes for each particular Learnership.

Work towards the general ratio of 1 assessor to 12 learners.

With less practically demanding Learnerships [for example, Hospitality Reception] the ratio may be safely revised upwards.

However, with a Learnership such as Professional Cookery that has a very intensive practical demand, this ratio may have to be revised downwards.

## ASSESSOR'S RESPONSIBILITIES

The responsibilities of the Assessor to the learners are to:

advise their respective learners about National Qualifications

*carry out the initial evaluation on the learner so that they may be assisted in selecting a*

Learnership or unit standards that are the most suitable for them

guide the learner on areas of competence and development needs and to advise the

learner throughout the process on relevant learning resources

plan the assessment with the learner which includes:

communicating the organisational requirements

estimating a completion date

*providing feedback dates*

explaining performance measures and criteria

choosing assessment methods and tools that assist with smooth assessment

assess the candidate against the standard using fair, valid, reliable and flexible tools

(Website: THETA's Tourism Learnership Project management)

record the assessment decision

collect and document verifiable evidence to back up the decision

provide continuous and regular feedback

provide limited coaching if necessary during the assessment procedure if this will assist the learner gain competence

regularly review the assessment tools being used

forward relevant documentation to the Skills development Facilitator.

### Mentors and Coaches

It is very important to identify mentors inside and outside the workplace, and coaches within the workplace, because although these people might not be involved with the actual theoretical facilitation and assessments, they can provide extra support for the learners when the learners are in the workplace and the assessor is not available.

The mentors and coaches who are identified must be present at all briefing sessions so they are, and remain, informed and are aware of the assessment process.

Coaches should be trained and assessed against the relevant unit standards themselves. They must also be committed to assisting in the Learnership Project and be technically competent in the field in which they will assist.

### What is a Mentor?

A mentor is a 'wise and trusted advisor', someone sincere and willing to pass on his or her insight. A learner must feel safe to approach a mentor, and even though the mentor may challenge the learner to find their own solutions, the mentor should be able to do this in a way that is comfortable and non-threatening.

A mentor, at different times, must be a:

role model

teacher

advisor

life-coach

counsellor

buddy

leader

The Implementation Plan should describe what foundational mentorship is visualized in respect of that Learnership. The following could provide assistance in this regard:

scaffolding (support when skills are emergent)

modelling (exposure to expert practice)

sequencing (progressing from simple to more complex skills)

diversity (contact with a range of activities not only repetitive tasks)

support (both technical and personal)

collaboration (with other learners, sharing, comparing and working jointly on projects)

challenge, uncertainty and problem-solving

independence

What is the role of the Coach?

The coach:

should be available to work with the learner on a daily basis, if necessary. They should be an individual within the workplace, preferably the learner's supervisor, or a more experienced member of the workplace team.

should encourage the learner to upgrade their skills and should be available to assist and advise the learner when the learner faces a technical challenge.

must encourage the learner to build on their strengths, and should assist the learner to confront areas where there may be a need for improvement. The coach requires the ability to enable the learner to achieve ongoing success, acknowledging and understanding that different learners will have different learning styles.

STEP 14. Select employed learners.

Forms required:

None.

Additional information in this file:

None.

Guidelines:

Enact recruitment and selection process as devised in Step 6 and agreed in Steps 8 and 12.

Potential learners must only be regarded as learners once the signed and completed contracts and agreements have been submitted to the THETA ETQA, the ETQA has

generated a Learner Registration number and has informed the organisation of the Learner registration number.

With the agreements having been registered, the Learnership truly begins and from this point and up to the conclusion of the Learnership, quality assurance becomes an essential element of the process.

**STEP 15.** Begin the process of selecting unemployed learners.

Forms required:

None.

Additional information in this file:

Info sheets:

Sources for recruiting and selecting unemployed people for Learnerships

Processes for recruiting and selecting unemployed people for Learnerships

Guidelines:

Enact recruitment and selection process as devised in Step 6 and agreed in Steps 8 and 12.

**NOTE:** As the time between selecting unemployed learners and their starting the Learnerships and skills programmes must be short (less than a month), this process should only be started when it is feasible to make the selection near the actual commencement of the Learnership.



Potential learners must only be regarded as learners once the signed and completed contracts and agreements have been submitted to the THETA ETQA, the ETQA has generated a Learner Registration number and has informed the organisation of the Learner registration number.

With the agreements having been registered, the Learnership truly begins and from this point and up to the conclusion of the Learnership, quality assurance becomes an essential element of the process.

**STEP 16. Train and register facilitators and assessors and identify learning material**

Forms required:

None.

Additional information in this file:

None.

Guidelines:

Has the necessary staff for facilitation and assessing been identified?

Have these staff members been allocated against the unit standards they will be required to deliver?

Have these staff members themselves been trained to deliver their function?

Unlike some of the other roles identified in Step 4, assessors and facilitators must be registered with THETA to perform their role – and must have acquired the necessary unit standards to achieve this status. People already trained as assessors may need to update their registrations.

Contact the TLP Call Centre for more information about registration, and training which the TLP facilitates through the ETDPSETA and may pay for.

Training of facilitators and assessors is now the responsibility of the ETDPSETA. However, the request for training of facilitators and assessors must still be routed through the THETA TLP which will require the submission of a short needs analysis to establish the need for the training of how many personnel and for what areas.

Has Outcomes-based facilitation learning material been developed and aligned?

The learning material used in presenting a Learnership ought to take the following characteristics into account:

do all activities, be they workplace- or classroom-based, focus on the work process whilst contributing to the objectives and essence of the work

do both the formal training and facilitation as well as the workplace experience enable the learner to experience the work that is the aim of the Learnership

does learning by practical experience predominate so the learner develops the ability to do the work rather than simply gain a theoretical understanding of how the work ought to be done

do learners have regular exposure to see and work with specialists in the classroom and workplace environment, where the specialists carry out the task as it should be done in front of the learner, **before** the learner attempts the activity

does the workplace component of the Learnership actively promote an increase in responsibility and accountability of the learner within the work environment

does the learning material provide the opportunity for the learner to record their responses to tasks, and can these responses be easily integrated into the learner's

Portfolio of Evidence

is formal and workplace learning methodically integrated and do the learning materials and facilitators' notes reflect this

is there the opportunity, when facilitating and assessing learners, to take into account the workplace's organisational requirement needs, as it may not be enough to facilitate and assess against the unit standard only

can the learner record the policies and procedures of the workplace through the medium of the learning material

has the workplace ensured that it, in turn, has the required policies and procedures in place **BEFORE** the learner needs to access such

**STEP 17. Induct employed learners.**

Forms required:

Learnership agreement.

Additional information in this file:

Qualification matrices (of the chosen Learnerships & skills programmes)

(Website: THETA's Tourism Learnership Project management)

Info sheets:

Learnerships available in the Conservation sub-sector

Learnerships available in the Hospitality sub-sector

Learnerships available in the Tourism sub-sector

Benefits for learners: skills development.

Guidelines:

Induction is intended to inform people who are new to a situation about the context they are entering, as well as the rules and various issues that prevail in that situation.

As these learners are current employees (and should have already been inducted into the organisation) the purpose of this induction is to identify the Learnerships / skills programmes as a period different from the rest of their employment. It could also start constructing the learners as a group distinct from the peer groups they may be used to in their line function.

This induction process should focus on the details of the implementation of the Learnerships and skills programmes - including an introduction to the learning programme itself.

Depending on how the Learnership is started could also determine how it will continue. A show of enthusiasm and support will be motivating to all participants.

The induction should include:

an explanation of the rights and duties of the three parties involved in the Learnership, these being the Learner, the Employer, and the Training Provider;

an explanation of the Learnership Agreement;

the effect of Learnerships and skills programmes on their current conditions of employment (which will NOT change during their training, although their Key Performance Areas / performance management criteria will have to be reviewed for this period, particularly if there is a salary linked appraisal system);

the dispute mechanism available to all parties during the training period.

The following should be read through with potential learners so that they are thoroughly briefed on what is being offered to them and that they are aware of their responsibilities as a learner:

#### LEARNERSHIP ORIENTATION CHECKLIST:

Explain Learnerships:

What they are

How they differ from other training programmes

The change in the delivery style of learning (Facilitation)

From where the money for the roll-out of the Learnership is coming

Involvement of the Employer

Involvement of the Training Provider

Benefits to the Learner

Benefits to the Site / Employer

(Website: THETA's Tourism Learnership Project management)

### Responsibilities of Site / Employer

### Responsibilities of the Learner:

work for the Employer as part of the learning process

be available for and participate in all learning and work experience required by the Learnership

comply with all workplace policies and procedures

complete any timesheets and written assessment tools supplied by the Employer and Training Provider to record relevant workplace experience

attend all study periods and theoretical learning sessions with the Training Provider and undertake all learning conscientiously

### Responsibilities of the Facilitator

### Responsibilities of the Assessor

### Role of the Coach

### Role of the Mentor

### Completion Dates

### Appeal procedure

### Explain the Appeal Procedure

An example of an appeals procedure may be found on page 9 of Templates in this document. It should be adapted and customised for the organisation.

It is essential that every organisation have an appeals procedure.

## STEP 1

If the learner is not satisfied with the assessment decision, the learner must discuss it with the assessor.

The assessor and learner should try to work out a mutually satisfactory solution.

## STEP 2

If the learner is not satisfied with the proposal in step 1 they may complete the appeal form in writing and forward it as soon as possible to the Skills Development Facilitator. The learner must clearly motivate the reasons for the appeal.

The Skills Development Facilitator must call a meeting with the assessor and the learner within 72 hours of receiving the appeal.

The Skills Development Facilitator may:

ask the assessor to re-assess the learner

ask the assessor to re-assess the learner with the Skills Development Facilitator present during assessment

ask another assessor to assess the learner

The outcome must be recorded in writing, kept with the learner's records and forwarded to the Skills Development Facilitator.

## STEP 3

If the learner is still not satisfied with the outcome of the appeal, the Skills Development Facilitator may contact the Learnership co-ordinator / relevant Chamber Manager at the ETQA.

The decision of the Learnership Co-ordinator / Chamber Manager is final.

The Learnership Co-ordinator / Chamber Manager may:

assess the learner

ask another assessor to assess the learner

ask the assessor to re-assess the learner in the presence of the Learnership Co-ordinator/ Chamber Manager

The outcome must be recorded in writing and kept on file with the learner's records.

### Organisation's Policies and Procedures

Assessment procedure

Criteria against which the Learner will be assessed

Takes precedence over learning material

Give the learners their Learning Material

Go through the Learning material with the Learners

Look at examples of questions and assignments along with the Learners

Give the learners their Schedule of Learning

Go through first session dates and the list of units to be completed

### Termination of Learnership

Leaving site and going elsewhere

No longer wants to do Learnership

No longer physically capable of completing the Learnership

Loss of Learning Material

Not completing workbook on time

Not complying with Standard Operating Procedures

STEP 18. Set up internal records for learners.

Forms required:

None.



Additional information in this file:

None.

Guidelines:

Employers are required by law to keep a record of all learning contracts and training that takes place. Where a current system is in place, it can be retained or adjusted to meet the criteria prescribed in legislation. It is not necessary to spend a lot of money on a complex computer-based or other record keeping systems because a simple paper-based record or Excel-based computer programme is likely to be adequate.

In addition to keeping records, organisations are required to advise THETA on a monthly basis of all learning achieved towards qualifications and to keep copies of this reporting for the organisation's own records. When a learning programme is completed – be it a partial or full qualification - THETA will forward this information to SAQA to insert on the National Learner Record Database.

**THIS RELATES TO BOTH THE EMPLOYER AND THE TRAINING PROVIDER:**

The following lists the minimum records that either the Training Provider or the Employer or both ought to be keeping:

learner registration database [Employer]

copies of each learner's Agreements and Contract [Employer]

learner allowance database [Employer]

facilitation records [Training Provider]

(Website: THETA's Tourism Learnership Project management)

learner daily attendance register

facilitator's comparative completion schedule – what has actually been facilitated in comparison to what theoretically should have been facilitated

what physical resources have been used (for example foodstuff ingredients for Professional Cookery / cleaning materials for Accommodation Services)

feedback and general weekly reports

assessor records

learner daily workplace register [Employer]

assessor's logbook of time spent at each workplace with each learner [Training Provider]

Portfolios of Evidence for each learner [Training Provider].

The organisation needs to decide on what documentation is going to be used to record the assessment. This documentation must reflect the following information:

what the assessor saw the learner do

how the assessor verified what was seen

any embedded knowledge questions that the learner answered

how the assessor verified what was told to them

any short-time coaching that had to take place

consistency of competent performance by the learner

feedback sessions with the learner

dates of all above activities taking place

overall assurance that all specific outcomes have been met for that unit standard

completed unit standards

assessment guides

any correspondence relating to that learner

activity logs

Declarations of Competence, part- or full-qualification

all of which must be kept until final certification of Declaration of Competence is issued and the monitoring and evaluation process completed.

evidence of any mentoring and coaching [Training Provider and Employer]

learner resignation forms and exit-interview details [Employer]

grant claims [Employer]

STEP 19. Prepare support services and support people in each site.

Forms required:

None.

Information in the implementation pack:

None.

Guidelines:

Learners will rely on a range of formal and informal systems and resources to support their learning. These could include peers in the workplace, a learner support person/service and other facilities that may be available, for example: learning resources, learning methodologies, subject matter expertise, counselling, guidance, etc.

(Website: THETA's Tourism Learnership Project management)

Preparation of the learning contexts could therefore include:

identifying and briefing learners' support people;

identifying support facilities for learners and ensuring they are available and accessible;

briefing peers and people related to the learner in their learning worksites.

It is particularly important that staff are fully briefed regarding the placement of unemployed learners prior to their being inducted and placed.

**STEP 20** Have contractual documents signed with employed learners.

Forms required:

Pre-requisites for implementing skills development

Learnership Agreement

Learner Registration (for skills programmes only)

Step-by-step guide for Employers claiming grants for implementing Learnerships

Learnership Grant Claim form 1 – employed learners

Additional information in this file:

None.

Guidelines:

Before signing any contractual forms, use the checklist “Pre-requisites for implementing skills development” to ensure that all the preparatory steps have been completed.

Learnerships

In contrast to other forms of training, Learnerships require that a formal agreement be signed, committing the various parties – namely the Employer, the learner and the Training Provider - to various responsibilities before the programme can commence.

The Learnership Agreement is long and legally binding and it clarifies the rights and duties of each party so that they may understand what they will be expected to do. An explanation of the Learnership Agreement should be included in induction so that learners fully understand what they are signing.

Skills Development Facilitators will submit their organisation's Learnership Agreements to THETA. As a discretionary grant may be available for commencing a Learnership, however, they should also submit a completed “Grant Claim Form 1 – employed learners”.

Ensure that each Learnership registration form has been correctly and completely filled in. It is preferable to write in black ink on all legal documents. Also ensure, for the quick capture by THETA's administration department, that all writing is legible.

Check that the organisation retains a copy of the Agreement, as a copy must be given to the learner and a copy must go on the Learner's file with the organisation. The original document must be sent to the THETA ETQA.

#### Skills programmes

Parties involved in skills programmes are not required to sign an agreement. Instead, Employers should complete a Learner Registration Form and submit this to THETA for the composition of the skills programme to be checked.

STEP 21. Finalise selection of unemployed learners.

#### Forms required:

None.

#### Additional information in this file:

None.

#### Guidelines:

Complete the stages of the selection process devised in Step 6 and agreed to in Steps 8 and 12.

STEP 22. Induct unemployed learners.

Forms required:

Learnership agreement

Learner contract of employment

Additional information in this file:

Basic Conditions of Employment Act No 75:

Sectoral determination No 5: Learnerships.

Qualification matrices (of the chosen Learnerships & skills programmes)

Info sheets:

Learnerships available in the Conservation sub-sector

Learnerships available in the Hospitality sub-sector

Learnerships available in the Tourism sub-sector

Benefits for learners: skills development.

Guidelines:

This induction is substantially different to that for employed learners as it includes an introduction to the organisation as well as the learners' conditions of employment that are for the sole purpose of training.

Topics that could be covered are:

Introduction to the organisation

(Website: THETA's Tourism Learnership Project management)

Introduction to the departments in which the Learnership will be taking place

Introduction to Learnerships and the topics they will be learning about

Description of their learning programmes

Their rights and duties as learners

Conditions and duration of the Contract of Employment

Implications of signing the Contract of Employment

Conditions of Service, benefits and the stipend

The organisation's Code of Conduct and other staff rules

The dispute resolution mechanism

See also step 17 – learner orientation checklist.

**STEP 23. Have contractual documents signed with unemployed learners.**

Forms required:

Learnership Agreement

Learner Contract of Employment

Learner Registration (for skills programmes only)

Pre-requisites for implementing skills development

Step-by-step guide for Employers claiming grants for implementing Learnerships

Learnership Grant Claim form 2 – unemployed learners

Additional information in this file:

Basic Conditions of Employment Act No 75:

Sectoral determination No 5: Learnerships.

(Website: THETA's Tourism Learnership Project management)



Guidelines:

This is the same as for employed learners in Step 20 except that there is a Contract of Employment that must be signed as well.

The Contract of Employment outlines the nature, conditions and duration of the employment relationships whilst the learner is engaged with the Learnership.

Ensure that each Learnership registration form has been correctly and completely filled in. It is preferable to write in black ink on all legal documents. Also ensure, for the quick capture by THETA's administration department, that all writing is legible.

Make certain that in the case of unemployed learners being involved in a Learnership, the Learner Contract of Employment (signed between the Learner and the Employer) is completed and submitted to THETA.

The organisation's Skills Development Facilitator should retain a copy of the contracts and agreements, as a copy of each must be given to the learner and a copy must go on the Learner's file with the organisation.

The original, signed Learnership Agreement, Learner Registration form (if applicable) and Contract of Employment must be submitted to the THETA ETQA.

STEP 24. Recognise Prior Learning (RPL) of all learners. Amend learning programmes accordingly.

Forms required:

None.

Additional information in this file:

None.

Guidelines:

The purpose of the Recognition of Prior Learning (RPL) is to assess what learners already know and can do in relation to the qualification they are registered for, and therefore to identify what learning still needs to take place.

Registered assessors are the only people who can conduct an RPL assessment. This may be with the Training Provider who will be implementing aspects of the Learnership or with the in-house accredited training department.

RPL can take a range of forms – from oral questioning, to written tests, to a portfolio of evidence usually compiled from work already done.

Whatever the form, there must be evidence of demonstrated competence.

The assessor reconciles the evidence from these against the specific outcomes of the unit standards in the qualification. They judge which aspects of the qualification the learner is already proficient in and therefore which can be excluded from his/ her learning programme.

The assessor issues a Declaration of Competence for any unit standards in which the learners is fully competent and sends it to THETA. The THETA ETQA will record the data that will eventually appear on the certificate once the full qualification has been achieved. (THETA sends the data to SAQA to insert on the National Learner Record Database.)

(Website: THETA's Tourism Learnership Project management)

Steps 25 to 26

## IMPLEMENTING LEARNERSHIPS AND SKILLS PROGRAMMES

STEP 25. Commence the learning and assessment processes.

Forms required:

Step-by-step guide for Employers claiming grants for implementing Learnerships

Learnership Grant Claim form 1 – employed learners

Learnership Grant Claim form 2 – unemployed learners

Additional information in this file:

Implementation planning guidelines

Guidelines:

Learning

Learnerships comprise a combination of on and off-the-job learning, while skills programmes can be offered in either or both settings. The manner and contexts in which the learning will be provided will largely be determined by:

the conditions that the learning requires (for example, working in a kitchen, at a reception desk etc.);

the competency that has to be achieved by the learners; and

the capacity of the organisation to provide the training and suitable learning resources and contexts.

In order for the learning process to begin, the following needs to take place:  
a learning programme should have been developed and given to learners. This includes time spent on and off-the-job, leave days, modules of learning etc.;

on-the-job training opportunities must be provided to learners under the supervision of trainers / mentors;

off-job-learning must be provided so that more theoretical aspects of the qualification, for example, essential embedded knowledge or theory, can be learnt.

Depending on how the Learnership Project is started could also determine how it will continue. A show of enthusiasm and support will be motivating to all participants.

#### Assessment

Learners are assessed on the knowledge and theories in relation to their on-the-job competencies. Assessment can take place before learning starts, during the learning programme and at the end of the programme.

Assessment before learning takes the form of Recognition of Prior Learning (RPL) and is dealt with in Step 24.

Assessment during learning is called formative, or continuous, assessment and allows the progress of the learner to be followed.

Summative, or integrated, assessment takes place when a learner is ready to be assessed finally and, as the name suggests, assesses that the learner can integrate all that s/he has learnt – theory with practice and one unit standard with another.

Assessors declare a learner competent - or "not yet competent", if this is the case.

They do this by assessing the learner's competence through demonstration of knowledge, skills and attitude.

Depending on the unit standard, assessment can be planned to check just knowledge or skill or attitude or all together. Ultimately, assessors must observe the whole process and base the assessment of competence on the end product.

Once a learner doing a Learnership has achieved half of the unit standards required for a full qualification, the Skills Development Facilitator (who monitors learners' progress within the organisation) should submit a Learnership Grant Claim form to THETA for the second instalment of the discretionary grant. There are two versions of this form (under "Forms" in this file) - one for employed and the other for unemployed learners.

Employers, who have included unemployed learners and are receiving a discretionary grant from THETA for their Learnerships, may also receive a quarterly stipend for each unemployed learner.

### Quality assurance

Moderation is the process of managing the quality and consistency of the assessment that takes place within an organisation. This entails checking the quality of the learning and assessment by internal moderators, who will audit:

- education and training (learning) provision;
- assessment processes; and

learner record keeping system and learner records.

If a moderator finds that they disagree with the assessor's recommendation (for example, that the learner is competent and ready to be certificated), they should recommend corrective action of some kind. This could include reporting the difference of opinion to the Skills Development Facilitator, or proposing measures themselves such as suggesting that another assessor be asked to give a second opinion of the assessment.

**STEP 26. Complete assessment. Send Declarations of Competence to THETA.**

**Forms required:**

**Declaration of Competence**

**Step-by-step guide for Employers claiming grants for implementing Learnerships**

**Learnership Grant Claim form 1 – employed learners**

**Learnership Grant Claim form 2 – unemployed learners**

**Workplace Skills Plan Implementation Report Guidelines and Format 2002 / 2003**

**Additional information in this file:**

**None.**

**Guidelines:**

Once assessors have decided that a learner is competent, the Skills Development Facilitator should send the Declaration of Competence completed by the assessor and copies of the learner's records to THETA.

THETA's quality assurance staff will then verify that the assessment process met the agreed THETA ETQA standards. Based on these recommendations and records (including any from the THETA ETQA verification), THETA will certify the learner as competent by issuing a certificate within 30 days of receiving the documentation.

The credits obtained by the learner are sent by THETA to SAQA to insert on the National Learner Record Database.

When a Learnership has been completed, a grant claim form should be submitted with the Declaration of Competence to THETA, to receive the final part of the discretionary grant.

#### Repeating the cycle

On completion of Learnerships and skills programmes, the effect on the aims identified in the Workplace Skills Plan should be noted and included on the Implementation Report, and future plans strategised. Further skills development requirements should be identified and implemented, in whichever format is appropriate.

The cycle is then repeated - although it is considerably simplified as many of the processes are now established!

#### Process Checklist:

Use this as a final check that the required areas to be considered have been dealt with.

Measures, Yes / No

1. Accreditation of Providers,

Has a declaration to the effect that the Provider has been accredited been included?

name of accrediting ETQA

period of accreditation

accreditation number

Provider contact person and contact details,

Is it acknowledged that the THETA ETQA reserves the right to stipulate specific qualifications for facilitators, assessors, mentors and coaches?,

2. Management representative,

Is there a letter of commitment from the Employer to the Learnership process?,

3. Co-operation between Providers and Employers to deliver Learnerships,

Has the co-operation between the Provider and the Employer, to ensure the integration of the workplace and formal training components, been put forward?,

If applicable, does this proposed system for co-operation allow for Lead Employers and/or Lead Providers?,

Has the service level agreement between the Employer and the Provider, if the Provider is not an in-house Provider, been dealt with?,

4. Project plan,

Does the implementation plan support provision for deliverables, time lines and a budget?,

5. Staffing of the Provider organisation,

Is there a declaration to the effect that the Provider has sufficient numbers of facilitation, assessing and development staff who are able to:



implement, facilitate and assess Learnership programmes in accordance with the precepts of Outcomes-Based Education

provide the requisite guidance and support to learners,

6. Learner support services,

Are there relevant and up to date job descriptions in respect of the relevant persons responsible for the delivery of these services?,

7. Admission of learners to programmes,

Is there a detailed description of the organisation's system for selecting and allocating learners to Learnerships?,

Are there criteria for the selection of learners?,

Is there an awareness of the equity ratios as stipulated by the National Skills Development Strategy?

have these equity ratios been adhered to?,

Has an induction programme for the unemployed / already employed now entering into the Learnership been included?,

8. Mentorship of learners,

Has consideration been made in respect of the following:

scaffolding

modelling

sequencing

diversity

support

collaboration

independence ,

9. Appropriate and effective learning programmes and materials,

Is there a declaration to the effect that learning programmes are outcomes-based and are aligned to the relevant unit standards?,

Has provision has been made for:

all activities, both in the workplace and formal classroom

learning by experience

opportunities for modelling and access to specialists

the systematic integration of both formal learning and workplace learning

the role of the workplace component in actively promoting and increasing learner responsibility and accountability within the work context,

10. General education in Learnerships,

Is there an awareness of the general education to be provided in the Learnership, addressing the following issues in particular:

underpinning knowledge

general education relevant to the area of learning undertaken

communication and numeracy competencies,

11. Life long learning,

Are there structures in place to:

encourage learners to continue learning independently on completion of the Learnership

allow learners to reflect on their own learning and work,

12. Technical competence of the learner,

Is allowance made for how the Learnership will develop the necessary technical competence of the learner, including the specification and justification of the requirements of the workplace component of the Learnership?,

13. The formal learning component,

Does the implementation plan demonstrate how the following will be achieved:

- providing support and mediation between practical experience and theoretical knowledge
- encouraging learning that is both inductive and deductive
- developing generic abilities
- provision of counselling and support for possible conflicts between the learner and work
- the integration and contextualisation of the formal learning and facilitation component with the practical workplace experience component,

Does the formal learning component create the following:

- a progression from simple to more challenging tasks
- the initial provision of a support structure
- an increase in responsibility and independence
- the chance to be exposed to the broader, more generalized view
- underpinning of generic abilities,

14. The workplace component,

Is there a description of how the workplace learning will occur?,

15. Variety of employment contexts,

Has provision been made for a variety of appropriate, structured work experiences through the medium of multi-site hosting?,

16. Variety of Employers,

Has relevant provision been made for co-operation between various Employers, where the Employer cannot offer workplace experience covering all the specified learning outcomes?,

17. Assessment of learners,

Have arrangements been made for formative, summative and integrated assessment?,

18. Assessors,

Are there adequate numbers of assessors who will be available in the organisations intending to participate in the intended Learnership?,

Has a commitment been made that all assessors involved in the assessment of learners are already registered with an ETQA or that they will be registered by the start of the Learnership?,

Is there an indication of who will the workplace assessors be and at what stage of the Learnership they will be involved?,

Is there a declaration to the effect that the Provider is responsible for the assessment of the theoretical component of the Learnership, whilst assessors appointed to conduct assessment in the workplace will attend to the workplace component?,

19. Moderation,

Has thought been given to who will moderate what components of the Learnership, including situations where there is more than one Provider?,

Has the understanding been declared that:

the workplace component in respect of the Learnership will be moderated entirely and exclusively by the THETA ETQA

the Provider organisation's ETQA will be designated to moderate the theoretical learning component,

Is there knowledge around what moderation possibilities will apply to various components of the Learnership, where more than one Provider organisation is party to the Learnership?,

20. Record keeping in respect of Learnerships,

Are there systems in place for record keeping?,

21. Quality audits,

Is there acknowledgment that THETA or its designated agent will conduct audits in respect of learnerships?,

Is there an undertaking to conduct self-audits according to the specifications prescribed by THETA?