

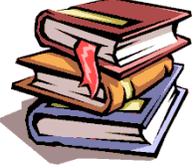
SKILLS PROGRAM
CONDUCT SKILLS DEVELOPMENT FACILITATION.

Learner Information:

| Details | Please Complete this Section |
|---------------------|-------------------------------------|
| Name & Surname: | |
| Organisation: | |
| Unit/Dept: | |
| Facilitator Name: | |
| Date Started: | |
| Date of Completion: | |

Key to Icons

The following icons may be used in this Learner Guide to indicate specific functions:

| | |
|--|---|
|  <p>Books</p> | <p>This icon means that other books are available for further information on a particular topic/subject.</p> |
|  <p>References</p> | <p>This icon refers to any examples, handouts, checklists, etc...</p> |
|  <p>Important</p> | <p>This icon represents important information related to a specific topic or section of the guide.</p> |
|  <p>Activities</p> | <p>This icon helps you to be prepared for the learning to follow or assist you to demonstrate understanding of module content. Shows transference of knowledge and skill.</p> |
|  <p>Exercises</p> | <p>This icon represents any exercise to be completed on a specific topic at home by you or in a group.</p> |
|  <p>Tasks/Projects</p> | <p>An important aspect of the assessment process is proof of competence. This can be achieved by observation or a portfolio of evidence should be submitted in this regard.</p> |

| | |
|--|--|
|  <p>Workplace Activities</p> | <p>An important aspect of learning is through workplace experience. Activities with this icon can only be completed once a learner is in the workplace</p> |
|  <p>Tips</p> | <p>This icon indicates practical tips you can adopt in the future.</p> |
|  <p>Notes</p> | <p>This icon represents important notes you must remember as part of the learning process.</p> |

Learner Guide Introduction

| | |
|--|--|
| <p>About the Learner Guide...</p> | <p>This Learner Guide provides a comprehensive overview of the Conduct Skills Development Facilitation., and forms part of a series of Learner Guides.</p> <p>The series of Learner Guides are conceptualized in modular's format and developed for National Certificate: Occupationally Directed Education Training And Development Practices at NQF Level 5, worth 120 credits.</p> <p>They are designed to improve the skills and knowledge of learners, and thus enabling them to effectively and efficiently complete specific tasks.</p> <p>Learners are required to attend training workshops as a group or as specified by their organization. These workshops are presented in modules, and conducted by a qualified facilitator.</p> |
| <p>Purpose</p> | <p>The purpose of this Learner Guide is to provide learners with the necessary knowledge related to Conduct Skills Development Facilitation</p> |
| <p>Outcomes</p> | <p>At the end of this module, you will be able to:</p> <ul style="list-style-type: none"> • Provide information and advice regarding skills development and related issues • Define target audience profiles and skills gaps • Conduct skills development administration in an organisation • Coordinate planned skills development interventions in an organisation • Develop an organisational training and development plan • Conduct an analysis to determine outcomes of learning for skills development and other purposes |
| <p>Assessment Criteria</p> | <p>The only way to establish whether a learner is competent and has</p> |

| | |
|--------------------------|--|
| | <p>accomplished the specific outcomes is through an assessment process.</p> <p>Assessment involves collecting and interpreting evidence about the learner's ability to perform a task.</p> <p>This guide may include assessments in the form of activities, assignments, tasks or projects, as well as workplace practical tasks. Learners are required to perform tasks on the job to collect enough and appropriate evidence for their portfolio of evidence, proof signed by their supervisor that the tasks were performed successfully.</p> |
| To qualify | To qualify and receive credits towards the learning program, a registered assessor will conduct an evaluation and assessment of the learner's portfolio of evidence and competency |
| Range of Learning | This describes the situation and circumstance in which competence must be demonstrated and the parameters in which learners operate |
| Responsibility | <p>The responsibility of learning rest with the learner, so:</p> <ul style="list-style-type: none"> • Be proactive and ask questions, • Seek assistance and help from your facilitators, if required. |

UNIT STANDARD ALIGNMENT

| Number | Title | Level | Credits |
|--------|---|-------|---------|
| 15221 | Provide information and advice regarding skills development and related issues | 5 | 5 |
| 123396 | Define target audience and skills gaps | 4 | 5 |
| 15217 | Develop an organisational training and development plan | 5 | 6 |
| 15218 | Conduct an analysis to determine outcomes of learning for skills development and other purposes | 6 | 4 |
| 15232 | Coordinate planned skills development interventions in an organisation | 5 | 6 |
| 15227 | Conduct skills development administration in an organisation | 4 | 4 |

Introduction.

The purpose of this program is to equip Skills Development Facilitators (SDF) with the necessary knowledge, skills and attitudes to facilitate the skills development processes in the selected workplace(s) as prescribed in the Skills Development Act.

The functions of the SDF

The following are the specific functions of the skills development facilitator:

1. Assist the employer and workers with the development of a workplace skills plan
2. Submit the workplace skills plan to the relevant SETA
3. Advise the employer on the implementation of the workplace skills plan
4. Assist the employer with the drafting of an annual training report in relation to the approved workplace skills plan
5. Advise the employer on the quality assurance requirements as set by the relevant SETA
6. Served as a contact person between the employer and the relevant SETA

The skills development facilitator should be registered with the SETA, and should be able to meet the competency guidelines for a skills development facilitator.

Who can be a SDF?

An employer must appoint a competent **skills development facilitator** who is able to perform the functions stated above and who is one of the following:

1. an employee, or
2. a formally contracted, external person, or
3. a person who is jointly employed by a number of employers to assess the skills development needs of the group of employers and workers concerned.

RECAP AND REVISION

| | |
|--|---|
| <p>US15221: Provide information and advice regarding skills development and related issues</p> <p>Legislation related to the Skills Development Strategy</p> | <ul style="list-style-type: none">• South African Qualifications Authority Act 55 of 1998 – will be replaced in 2009 by the NQF Act• Skills Development Act 97 of 1999 – to be amended• Skills Development Levies Act 9 of 1999 – amended• Employment Equity Act 58 of 1998• Labour Relations Act 66 of 1995 as amended |
| <p>ETQA'S</p> | <p>Quality Council for Trades and Occupations</p> <p>will replace the ETQA'S at the 23 seta's</p> <p>QA functions have not been finalised</p> |
| <p>National Skills Authority</p> | <ul style="list-style-type: none">• The NSA: |

| | |
|---|---|
| | <ul style="list-style-type: none"> • Advises the Minister of Labour on the nature and implementation of Skills Development Policy and Strategy; • Liaises with and oversees the workings of Sector Education and Training Authorities (SETAs) |
| <p>Standard Generating Bodies (SGBs)</p> | <ul style="list-style-type: none"> • Generate unit standards and qualifications in sub-fields and levels and recommend these to SAQA • Recommend criteria for registration of assessors and moderators |

| <p>Sector Education and Training Authorities (SETAs)</p> | <p>Have the following functions:</p> <ul style="list-style-type: none"> • To develop a strategic focus and sector skills plans • Establish and register Learnerships • Perform ETQA functions • Allocate grants • Monitor education and training <table border="1" data-bbox="824 766 1414 1873"> <thead> <tr> <th data-bbox="824 766 1414 848">SETA</th> </tr> </thead> <tbody> <tr> <td data-bbox="824 848 1414 930">Agriculture (Agri-SETA)</td> </tr> <tr> <td data-bbox="824 930 1414 1012">Banking SETA</td> </tr> <tr> <td data-bbox="824 1012 1414 1094">Chemical Industries (Chieta)</td> </tr> <tr> <td data-bbox="824 1094 1414 1226">Clothing, Textiles, Fabrics and Leather Industries (CTFL SETA)</td> </tr> <tr> <td data-bbox="824 1226 1414 1308">Construction (CETA)</td> </tr> <tr> <td data-bbox="824 1308 1414 1440">Education, Training and Development Practices (ETDP SETA)</td> </tr> <tr> <td data-bbox="824 1440 1414 1522">Energy Sector (ESETA)</td> </tr> <tr> <td data-bbox="824 1522 1414 1654">Food and Beverages Industry (Foodbev SETA)</td> </tr> <tr> <td data-bbox="824 1654 1414 1736">Forest Industries (FIETA)</td> </tr> <tr> <td data-bbox="824 1736 1414 1818">Health and Welfare (HWSETA)</td> </tr> <tr> <td data-bbox="824 1818 1414 1873">Information Systems, Electronics and</td> </tr> </tbody> </table> | SETA | Agriculture (Agri-SETA) | Banking SETA | Chemical Industries (Chieta) | Clothing, Textiles, Fabrics and Leather Industries (CTFL SETA) | Construction (CETA) | Education, Training and Development Practices (ETDP SETA) | Energy Sector (ESETA) | Food and Beverages Industry (Foodbev SETA) | Forest Industries (FIETA) | Health and Welfare (HWSETA) | Information Systems, Electronics and |
|---|--|-------------|-------------------------|--------------|------------------------------|--|---------------------|---|-----------------------|--|---------------------------|-----------------------------|--------------------------------------|
| SETA | | | | | | | | | | | | | |
| Agriculture (Agri-SETA) | | | | | | | | | | | | | |
| Banking SETA | | | | | | | | | | | | | |
| Chemical Industries (Chieta) | | | | | | | | | | | | | |
| Clothing, Textiles, Fabrics and Leather Industries (CTFL SETA) | | | | | | | | | | | | | |
| Construction (CETA) | | | | | | | | | | | | | |
| Education, Training and Development Practices (ETDP SETA) | | | | | | | | | | | | | |
| Energy Sector (ESETA) | | | | | | | | | | | | | |
| Food and Beverages Industry (Foodbev SETA) | | | | | | | | | | | | | |
| Forest Industries (FIETA) | | | | | | | | | | | | | |
| Health and Welfare (HWSETA) | | | | | | | | | | | | | |
| Information Systems, Electronics and | | | | | | | | | | | | | |

| | | |
|--|--|--|
| | Telecommunication Technologies (ISETT) | |
| | Insurance (INSETA) | |
| | Local Government, Water and Related Services (LDWSETA) | |
| | Media, Advertising, Publishing, Printing and Packaging (MAPPP) | |
| | Mining (MQA) | |
| | Manufacturing, Engineering and Related Services (MERSETA) | |
| | Safety and Security (SASSETA) | |
| | Public Services (PSETA) | |
| | Services (SERVICE SETA) | |
| | Tourism, Hospitality and Sports (THETA) | |
| | Transport (TETA) | |
| | Wholesale and Retail (WRSETA) | |

| | |
|--|--|
| <p>Skills Development Act 97 of 1999 – to be amended</p> | <p>Purpose:</p> <ul style="list-style-type: none"> • To improve the skills of the workforce • To increase investment in education and training • To promote the workplace as a learning environment • To improve the prospects of those who were previously disadvantaged • Improve productivity of South African workers • To encourage competitiveness <p>To encourage self-employment</p> |
| <ul style="list-style-type: none"> • Skills Development Levies Act 9 of 1999 | <ul style="list-style-type: none"> • WHO PAYS THE LEVY? • All employers with a payroll of more than • R500 000 per annum • HOW MUCH DO THEY PAY? • 1% of their total payroll • WHO IS THE LEVY PAID TO? • SARS • 20% Goes to the National Skills Fund • 80% to the SETA • SETA Retains 10% for admin and operational |

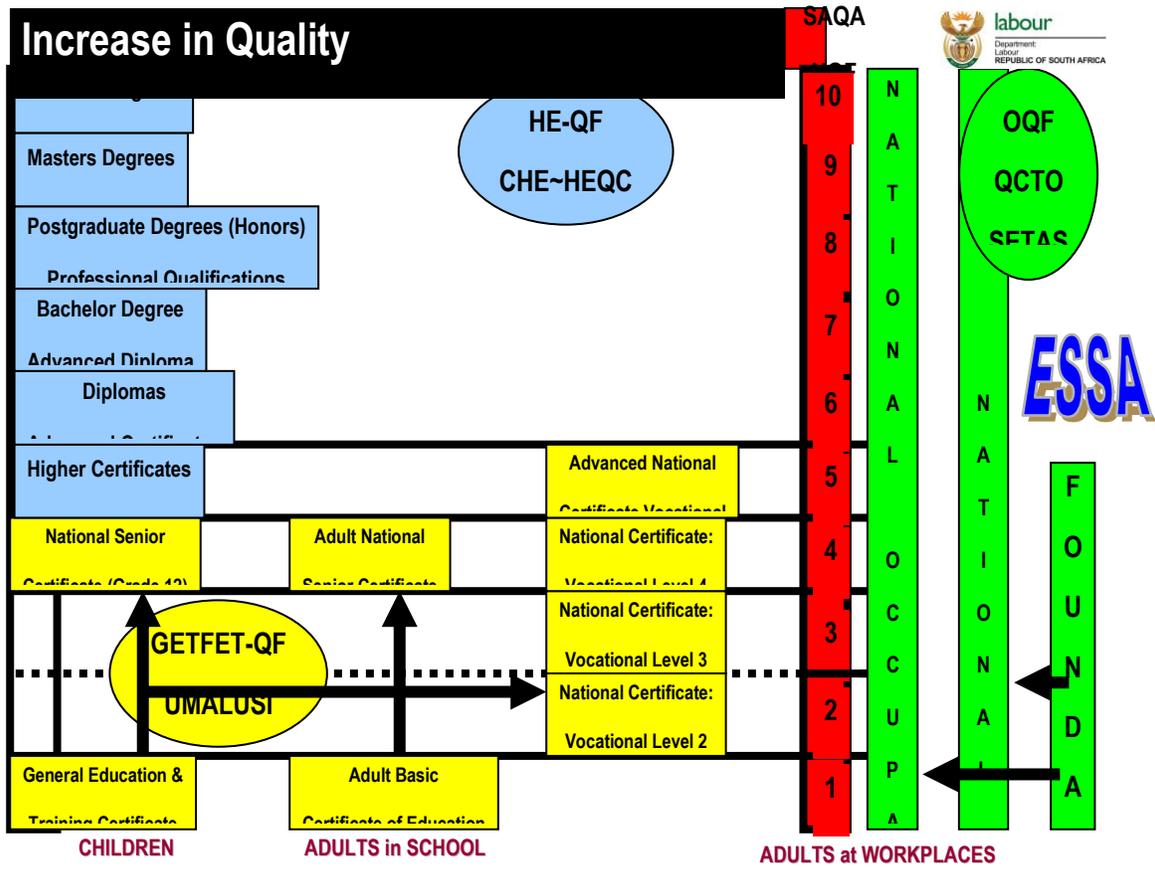
| | |
|--|---|
| | <p>costs</p> <ul style="list-style-type: none"> • 50% Can be distributed to constituent employers, based on ART • 10% is distributed as a discretionary grant |
| <ul style="list-style-type: none"> • EMPLOYMENT EQUITY ACT | <ul style="list-style-type: none"> • Introduced to prevent discrimination in the workplace on the basis of: • Race, Age, Gender, Sexual Preference, Physical or Mental Handicap and Social Class etc. |
| <p>12 FIELDS OF LEARNING</p> | <ol style="list-style-type: none"> 1. Agriculture and Nature Conservation 2: Culture and the Arts 3: Business, Commerce and Management 4: Communication Studies and Language 5: Education, Training and Development 6: Manufacturing, Engineering and Technology 7: Human and Social Studies 8: Law, Military Sciences and Security 9: Health Sciences and Social Service 10: Physical, Mathematical, Computer and Life |

| | |
|--|--|
| | <p>Sciences</p> <p>11: Services</p> <p>12: Physical Planning and Construction</p> |
| NATIONAL QUALIFICATIONS FRAMEWORK | <ul style="list-style-type: none"> • SEE NEW NQF ON PAGE 10 |
| QUALIFICATIONS AND CREDITS | <ul style="list-style-type: none"> • NATIONAL CERTIFICATE (120 CREDITS) • NATIONAL FIRST DIPLOMA (240 CREDITS) • NATIONAL FIRST DEGREE (360 CREDITS) |
| CREDITS | <ul style="list-style-type: none"> • A CREDIT IS THE VALUE OR WEIGHT ASSIGNED TO A PARTICULAR STANDARD OR QUALIFICATION • 1 CREDIT = 10 NOTIONAL HOURS • A Notional Hour is an indication of the time it will take the average learner to achieve competence in the unit standard |
| UNIT STANDARDS | <p>UNIT STANDARDS ARE</p> <p>“UNITS OF COMPETENCE”</p> |

| | |
|---|--|
| | <p>OR</p> <p>“BUILDING BLOCKS”</p> <p>OF ANY QUALIFICATION</p> <p>REGISTERED ON THE NQF</p> |
| <p>ALL SOUTH AFRICAN UNIT STANDARDS INCLUDE THE FOLLOWING:</p> | <ul style="list-style-type: none"> • US TITLE • SAQA LOGO • US NUMBER • NQF LEVEL • CREDITS • REGISTRATION START AND END DATE • PURPOSE • LEARNING ASSUMED TO BE IN PLACE • SPECIFIC OUTCOMES • ASSESSMENT CRITERIA • ESSENTIAL EMBEDDED KNOWLEDGE • ACCREDITATION PROCESS • RANGE STATEMENTS • CRITICAL CROSS-FIELD OUTCOMES • ANY OTHER INFORMATION REGARDING THE UNIT STANDARD |
| <p>RECOGNITION OF PRIOR LEARNING</p> | <p>IS A WAY OF RECOGNISING WHAT PEOPLE ALREADY KNOW AND CAN DO</p> <p>TWO TYPES OF RPL</p> |

- 1. THE RECOGNITION OF PRIOR ACCREDITED LEARNING
- 2. THE RECOGNITION OF PRIOR EXPERIENTIAL LEARNING

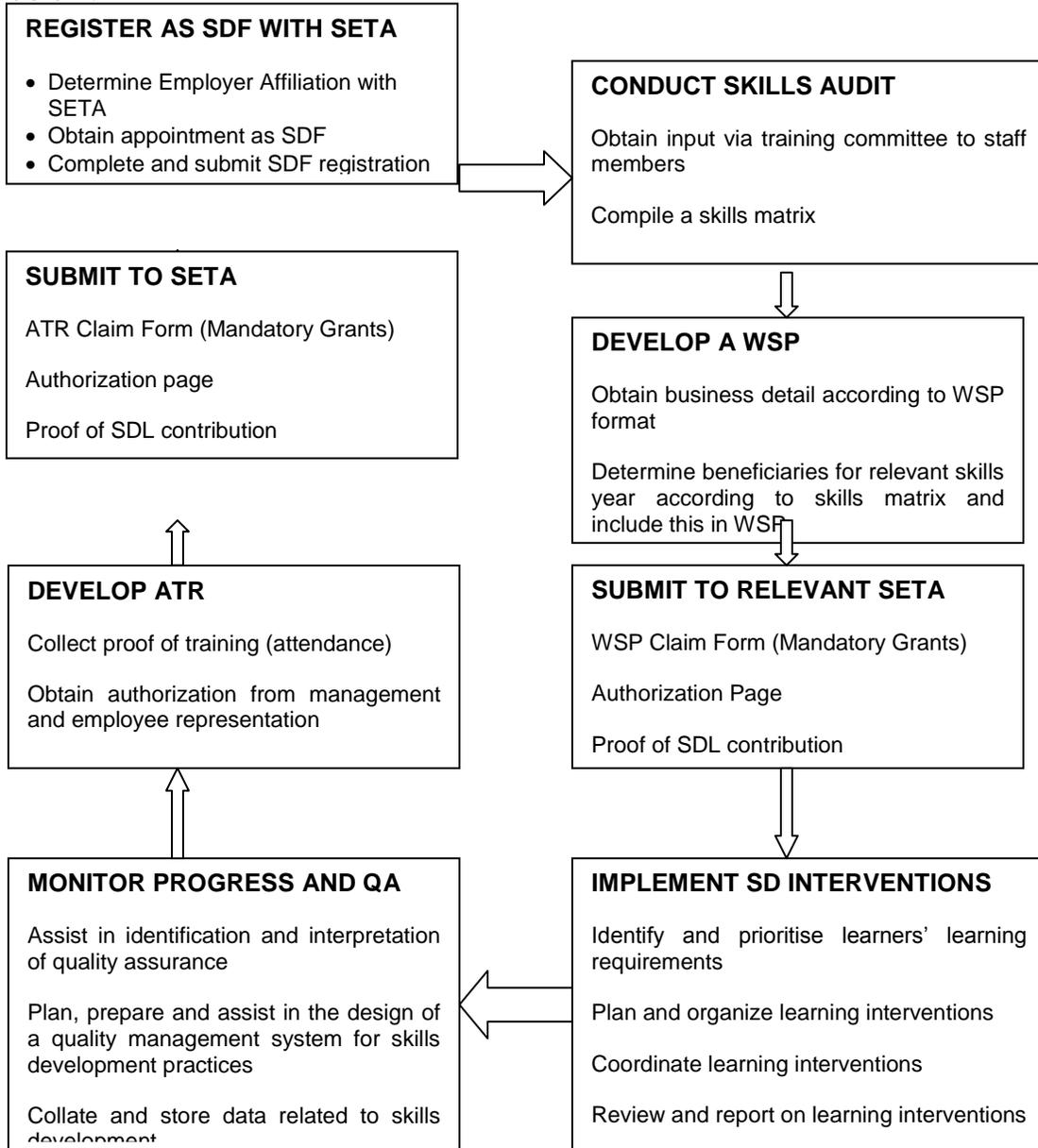
THE NEW NQF



1. SKILLS DEVELOPMENT LEVIES

Process Overview

An overview of the process of claiming Skills Development Levies are illustrated below:



US15217: Develop an organizational training and development plan

2. WORKPLACE SKILLS PLANS

The ideal way to approach the development of an Organisational training and Development Plan (TDP) or Workplace Skills Plan (WSP) is to treat the plan not as an isolated administrative chore to track and facilitate training but as a key business tool to examine the direction of the business as a whole and place training in its strategic place within that context. Although this implies a bit more work than just doing the bare minimum to get your skills development levy grant back, you will see the benefits impact your whole business and ensure that every cent you spend on training is a cent added to the momentum of your company's chosen forward direction. For ease of reference we will use the term workplace skills plan (WSP) throughout this section.

A WSP is a document that outlines the planned training and education interventions for a specific organisation in the coming year. It is created out of and in-depth evaluation of the business goals and an understanding of the challenges and forces at work both for and against the organisation in the wider business environment. The WSP should cover all skills development training and refers to:

- Strategic priorities for skills development
- Sectoral/national skills plans
- Linkages to employment equity

Key stakeholders in the process

1. Training Committee

A training committee is a selected group of people from within an organisation that help to create, write and implement the Workplace Skills plan for that organisation.

Any organisation that has more than 50 employees is obliged to form a training committee. The committee should be constituted in line with the occupational categories and levels in the Employment Equity Act to ensure representation of all employees within the company. Where there is a recognised trade union in place within the organisation, a trade union should nominate its own representatives using their own nomination structure. A representative from the HR department and the training department should also be included on the training committee. Don't forget to include representatives for both hourly and monthly paid employees when formulating representation on the training committee.

Companies with less than 50 employees may still find it useful to appoint one or two employees to the training committee to make it more representative of the needs of learners and to help the SDF by giving feedback on the calibre of training provided and the effectiveness of training interventions. A training committee is necessary because a Workplace Skills Plan will carry no credibility or organisational commitment unless it has been formed with the input and contributions of all those who will be affected by it.

They will also help develop the Workplace Skills Plan in line with SETA requirements and consult with employees in the workplace on training needs. They ensure that feedback is given to employees in the workplace on skills development and keep accurate training records.

In the past, companies decided on their training strategies with little or no consultation beyond top management. This is part of the reason why South African companies have found training to be generally ineffective learning

interventions that are imposed on people. They used to have considerably less impact than those where learners play some role in the choice of learning program content, venue times or means of assessment. Furthermore, before the NQF came into being, training was provided with little thought as to how it could benefit the learners' long term career prospects. Now that training and education have to take place in the context of quality assurance, life-long learning and the impact from training interventions. But to make the new training system work, there must be a closer partnership than before between management and employees – hence training committees.

2. Sector Education and Training Authorities (SETA)

SETAs will assist in a number of ways:

- They will encourage and help employers to prepare workplace skills plans. They will also pay a grant to an employer who prepares a plan. The SETAs will monitor these plans and their implementation. A workplace skills plan matches strategies and activities in the workplace to the skills that workers require.
- The SETAs will liaise with the skills development facilitator so that each employer knows about skills development. The facilitator will be the point of contact between the employer and SETA.
- SETAs will also be involved in the implementation of the National Skills Development Strategy. Each will agree the contribution its sector will make to the achievement of the national targets. A SETA will need to be actively encouraging employers to ensure that these targets will be met.

3. Organisations

Organisations that prepare and submit workplace skills plans have the following obligations:

- They must appoint a training committee, and get collaboration for their workplace skills plans from everyone in the organisation at all levels
- Ensure that the workplace skills plan forms an integral part of the human resource development program of the organisation, and is not simply a paper exercise aimed at getting levy money back
- Make sure that systems and processes are in place to monitor the implementation of the workplace skills plan and that training results in return on investment for the organisation
- Identify and record challenges to implementation of the workplace skills plan.
- Monitor the cost of training and keep track of funds paid out for training and skills development in the organisation.

4. The Skills Development Facilitator (SDF)

In addition to having a good understanding of the National Qualifications Framework, the SDF will be expected to perform the following functions:

- Conduct a Training Needs Analysis and develop organisation's Workplace Skills Plan
- Compile reports on the organisation's implementation of its Workplace Skills Plan
- Prepare, submit and steer the organisation's application for accreditation as a training and development site or to manage the contracting out of training and development to accredited providers
- Advise on and monitor implementation of the workplace skills plan including training delivery assessment and quality assurance.

Planning

You need to carefully plan a skills audit you will undertake in your organization. You must ensure that the necessary resources and people will be available to conduct a meaningful skills audit.

The plan must also state how you will gather the data. For example through questionnaires, interviews etc as well as how the information will be recorded. Target dates for completion of the skills audit are also important since the SETA's require the workplace skills plan to be submitted by a certain date.

1. Questionnaires (usually used in larger organisations)

These can be used to obtain information regarding biographical particulars, typical behaviour and attitudes. The questions should focus on the specific issue being investigated and provision should be made for each and every possible response. For example, when asking employees what they think is the most important skill lacking in their development it is best to use an open-ended question. Questionnaires that are developed by the organisation itself should preferably be tested in a pilot study.

2. Interviews (usually used in smaller organisations)

Structured Interviews:

In a structured interview the interviewer puts a collection of pre-planned questions to the respondent and records the latter's responses. The interviewer is restricted to the questions and has little freedom to deviate from the schedule of questions. The interviewer should be familiar with the questions so that they can make use of semi-structured interviews, which can be used when the research topic is very sensitive and when the respondents

come from diverse background. Interview guides are used and the interviewer may adapt the questions.

Unstructured Interviews:

Unstructured interviews can also be used to try and penetrate revelations of feelings by interviewees on a specific topic. No structure will be provided for an unstructured interview.

US15218: Conduct an analysis to determine outcomes of learning for skills development and other purposes

3. TO IDENTIFY & DEFINE THE SKILLS REQUIREMENTS OF THE ORGANISATION

Analyse Current Skills

- Before you can compile a WSP, you need to analyse your current training and skills situation.
- You will begin by gathering information on the sector and your organisation regarding legislation, trends, strategies and business objectives.

Conduct A Skills Audit

- Secondly you need to to determine the skills development needs of people in your workplace.
- You will then use all this information to compile a WSP.

Developing a Skills Matrix

1. The Purpose of a Skills Matrix:

A skills matrix:

- Identifies the skills needed in the organisation
- Matches them to possible unit standard titles
- Allows for matching of skills to nationally registered unit standards
- Identifies standards to be written for the organisation, if they are not available nationally

The skills and titles matrices may be used for various different human resource purposes in the workplace:

- The development of job profiles
- The creation of learning pathways
- The identification of possible learnerships
- The alignment of learning interventions
- The development of assessment guides
- Recruitment
- Performance management
- The alignment of HR systems

2. Compiling the Skills Matrix

The methodology requires the use of focus interviews and workshops. It is dependent on the participation of subject matter experts (SMEs), high performers and senior managers. Stakeholders must identify those key competences and key indicators of success that enable them to perform effectively. The critical incidents technique is used. Senior managers or executives are able to identify future trends and strategic requirements or changes within the functions that should also be recorded. The process is very reliant on the input from the implementing organisation and the construction, planning and preparation for each part of the process is critical to the overall success of the functional analysis process.

Steps in the Process

The following steps need to be followed when developing a skills matrix:

Step 1: Workshop with a project team (include subject matter experts)

Step 2: Use outcomes analysis to derive skills/knowledge factors and unit standards titles

Step 3: Use results of outcomes analysis and value chain process to develop a skills matrix and titles matrix

Step 4: Verify matrices with SMEs and finalise

Conduct an internal outcome analysis

When conducting an outcomes analysis you are trying to establish what skills, knowledge and role outcomes are required to complete a specified job. The role outcomes will assist with linking to possible Unit Standard.

There are two types of outcomes analysis:

1. Purpose Analysis

Analyses the function of a role, department, division or industry/education sector, and represents these distinctly different groups of activities that contribute to an operational purpose. This is considered to be a 'top down' approach.

For example, in a manufacturing sector there will be outcome areas dealing with:

- Product production and packaging
- Product distribution
- Sales
- Marketing
- Support services (eg finance and administration)

These areas will be defined and then broken down into job roles. An example of this is: Finance Department Bookkeeper, whose roles could be:

- Prepare journal
- Capture cash entries
- Download statements
- Prepare financial records

2. Process Analysis

In process analysis, we identify the transformations that take place, and then ask the question: *"In order to achieve this transformation, what must a person know and be able to do?"*

This is considered a 'bottom up' approach.

If we take the same example of the finance department bookkeeper whose tasks would include:

- Use PC to enter payments
- Type in all the payments that have been made
- Press f4 to transfer this information to make the journal entries
- Go into the journal screen and check the information

Using a combination of these two forms of analysis, enables teams to:

- Develop a skills matrix, and
- Derive a Unit Standards Titles Matrix (ie outcomes).

This is merely the start of the process of developing a skills matrix. The process involves a lot of discussion, input from team players, endorsement and refinement before the end result will be reached.

In order to start this analysis take the following steps and ask the following questions:

Steps and Questions

1. **Identify an industry, sector or discipline and ask:**

- What is the organisation's main responsibility? (This will indicate area of focus)
- What is the core business of the organisation?

2. Develop a key purpose statement by asking:

- What is the key purpose of this industry?
- What are the key outputs of the group? (This identifies purpose information/use verbs to prefix)

3. Identify specific work roles/areas and ask:

- Do all individuals in the group achieve similar outputs? (This helps identify similarities and differences, and channel the group's activity)
- Why do you do this?
- What do your customers expect from you?

4. Identify the key purpose for each role by asking:

- What is it that you (each role holder) are trying to achieve?

5. Identify clusters of knowledge and skill items, by asking:

- What do you need to know and be able to do in order to achieve your purpose?
- What results are you expected to deliver?
- What regulations and codes of practice must you adhere to?
- Do these knowledge and skills link to the role purpose?

6. Generate Unit Standard titles/outcomes, by asking (in relation to knowledge and skills identified):

- Why is it important that you are able to do this?
- What do you use this knowledge/skill to achieve?
- Are the US titles in line with SAQA format and principles? (use Critiquing Criteria)
- NB – always ask why an activity is undertaken in order to get to the outcome/result of that activity

7. Compile a skills and Unit Standard Titles Matrix from the information generated. Check that tasks or methods have not been identified as skills.

8. Verify these matrices with subject matter experts and make the necessary changes.

9. Select nationally registered standards and conduct a benchmarking/matching exercise of generated Unit Standards titles

Examples of Skills Matrices

| Skills Matrix – Manager | |
|--------------------------------|--|
| Leadership | <ul style="list-style-type: none"> • Motivating • Influencing • Change management • Delegating • Systems thinking • Managing diversity • Managing stress/stress management • Managing projects/project management • Developing strategy |
| Interpersonal | <ul style="list-style-type: none"> • Building relationships • Listening • Negotiating • Team building • Managing conflict/handling discipline • Managing performance • Networking • coaching/counseling/assessing |
| Communication | <ul style="list-style-type: none"> • Verbal communication • Written communication • Compiling reports • Providing feedback • Chairing/facilitating meetings • Presentation • Interviewing |

| | |
|--------------------|---|
| Planning | <ul style="list-style-type: none"> • Prioritising • Scheduling • Managing time/ time management • Analyzing • Evaluating • Co-coordinating • Decision making |
| Organizing | <ul style="list-style-type: none"> • Solving problems/problem solving |
| Controlling | <ul style="list-style-type: none"> • Managing quality |

DON'T FORGET ...

The skills and knowledge listed above are not exhaustive. Employees may not actually need certain skills and knowledge that have been indicated in this example.

Checklist for Skills Matrices

The following should be checked when developing a skills matrix:

- Skills needed are explained in detail
- List skills not tasks
- Check for duplication
- Use sub-headings eg communication, financial etc
- The tense is the same throughout
- Core skills are stated in the same way when used in more than one matrix
- Terminology has been used consistently between all generic skills matrices and titles matrices
- Core skills or titles relate specifically to that role

- Appropriate level of the skills or title documented eg simple, intermediate, complex
- If core skills or titles for a function have been included, eg for financial secretary that these correlate with what you have for the generic skills or titles for secretaries or admin roles
- Internal consistency between all matrices.

The following should be checked when developing a Unit Standards Titles matrix:

- Potential Unit Standards used should clearly link with the skills matrix
- Far fewer standards titles than skills
- Draft Unit Standards that have been identified are available
- Be realistic

When first generated, matrices are only about 60% correct. Stakeholder endorsement and changes in role outcomes lead to constant refinement and updating of matrices. As the Implementation Project Plan moves forward, each phase will possibly bring changes to the matrices, as new or overlooked skills and outcomes are identified.

4.ANALYSE CURRENT SKILLS AND DEVELOP SKILLS PROFILE OF THE ORGANISATION

Once the skills matrices have been developed, one of the most effective 'by-products' would be to compile skills based job profiles. These will assist the organisation to align itself to SAQA and SDA legislation.

Job profiles:

- Identify outputs and output measurements for each role
- Identify the skills required for each job profile
- Assign specific Unit Standards to specific roles in the organisation

Completed job profiles will assist with the following:

- Determining training and assessment interventions

- Developing learning pathways, career paths and learnerships
- Recruiting and inducting new employees
- Aligning organisational performance management and HR systems

Developing Skills Based Job Profiles

In order to develop job profiles the following steps need to be completed:

Step 1 Identify the jobs/roles to be profiled.

Step 2 Analyse the existing job information, such as job descriptions and skills/titles matrices.

Step 3 Identify one job incumbent for each role and arrange interview time.

Step 4 Briefly explain purpose of interview, then obtain the information to be included in the job profile from the job incumbent:

- Details of position, including purpose, context and customers
- Generate a comprehensive list of tasks/activities performed in the position
- Categorise the list into key functional areas (ie clusters of tasks that result in certain job outputs)
- Allocate each task/activity to a category/key functional area
- Identify the output that results from the performance of tasks/activities in each cluster
- Make a list of all people/groups of people who are direct recipients of each output (ie the customers). List only those who receive or make use of outputs listed previously

- Capture the benefits (advantages, value, assistance, profit to the customer) of outputs
- For each output, identify the quality standards (ie accuracy, relevance, customization, zero-defect and delivery) in measurable terms.

Step 5 Identify the Unit Standards applicable to each job through scrutinizing information gathered, existing job descriptions, the titles matrix and by asking the following questions:

- Which of the available unit standards are applicable to this job?
- Against which Unit Standards should the person holding this job be measured?

Step 6 In order to be capable of doing a job effectively and efficiently, a job incumbent needs specific skills, experience, underlying knowledge and personal attributes. Develop a competence profile using existing information from the skills matrix and new information gathered.

Step 7* (Optional) Identify the organisational/organisation values and behavioral indicators applicable to each position.

Step 8 Consolidate all information into a single job profile document, as per agreed format.

Step 9 Verify job profiles with supervisors/management and make adjustments where necessary. This is a vital step in the process, as job incumbents often exaggerate or conversely, limit their responsibilities.

Step 10 Ensure job profiles are aligned to organisational strategy.

Job profiles need to be reviewed regularly. For administrative purposes it is advisable to record the issue date and recommended review date.

Steps to Follow when Conducting Job Profiling Workshops and Interviews

Ask the following questions to identify role outputs:

Activities

- What do you know most about your jobs?
- What is it that we do? Eg
 - training needs analysis
 - learning program design and development
 - trainee selection
 - training
 - facilitation
 - feedback

Outputs

- What leaves your hand?
- What is it that you produce/make available?
- What is the end result of what you do eg
 - Developed learning programs
 - Trained staff

Outcomes

Cluster activities into common outcomes by asking;

- Why do you do this? Eg
 - Design learning programs

- Train staff

When checking the skills matrix, you should look out for the following:

- Do not list tasks instead of outcomes
- Ensure that each outcome has at least two quality measures
- Link skills from the skills matrix
- Check that the internal customers have at least one output linked to them
- Check that all the skills are matched to the outputs and quality measures
- If you include behavioural indicators then include a measure
- Check that the job profiles are discrete and unique eg management job profiles are different from an operator's job profile
- Check that there is consistency in terminology, language between job profiles
- Check that the same tense is used throughout

Example of a Job Profile

| | |
|--|---|
| Key Functional Area | Sales Support |
| Job Title | Claims Capturer |
| Grade | D3 |
| Organisational Context | Medical |
| Customers | <ul style="list-style-type: none">• Reps• Suppliers• Accounts Manager etc |
| Performance Specification Outputs (what must I provide to my customer) | Output Quality Requirements and Measurements (What standard I must achieve) |

| | |
|---|--|
| <p>Captured Medical Claims</p> <ul style="list-style-type: none"> • Pre-checked claim details • Verified claim details • Scanned and logged claims • Sorted and batched medical accounts • Additional claims requirements • Documents allocated to specific queues • Quality control • Reconciled system totals and manual totals | <p>Captured Medical Claims</p> <ul style="list-style-type: none"> • Claims scanned and logged according to procedures, within 24 hours of receipt and delivered to correct team member • Scans to be clear and readable • All relevant details to be captured 100% • Rejected claims returned immediately to Call Centre or claims capture team for update on system • Corrected claims processed within 24 hours |
| <p>Skills/Knowledge Specifications</p> | <p>Standards/Qualifications</p> |
| <p>Knowledge:</p> <ul style="list-style-type: none"> • Product knowledge (Medical Scheme and Provision Fund) • Computer knowledge (PC and Image system) • Tariff codes/modifiers/codes • Knowledge of business process charts. <p>Skills:</p> <ul style="list-style-type: none"> • Information scanning • Memory • Numerical fluency | <ul style="list-style-type: none"> • See Underwriting Claims • Information Technology Standards |

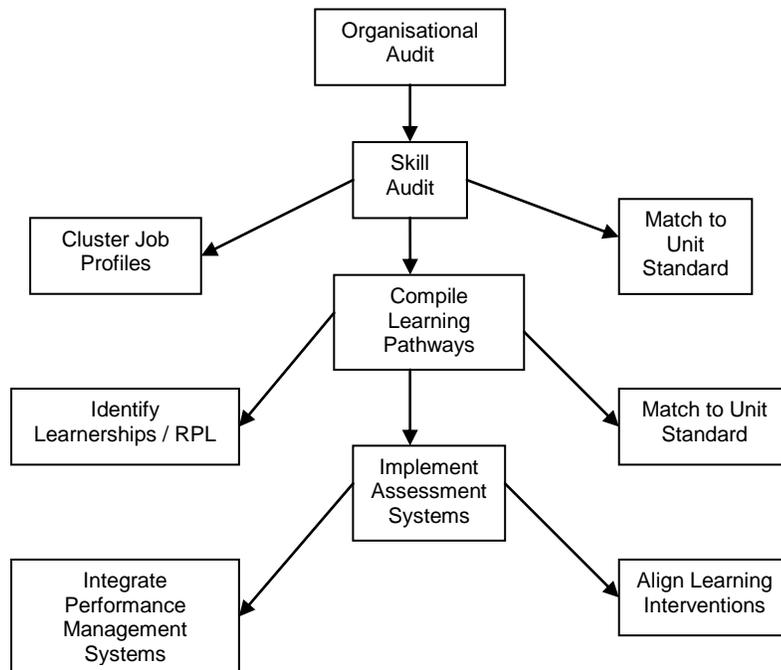
| Organisational/departmental Values | Behavioural Indicators |
|--|---|
| <ul style="list-style-type: none"> • Service orientation • Results orientation • Sense of urgency | <ul style="list-style-type: none"> • Process improvement proposals • Provide feedback to other team members when asked for ideas on improvement initiatives • Sense of urgency • Meets serviced level agreements and targets • Follow-up on outstanding claims daily • Phones medical suppliers, client or consultant before sending written correspondence |

5.PRODUCE AND VERIFY A MATRIX OF OUTCOMES

US123396: Define target audience profiles and skills gaps

Defining a skills Audit

A skills audit is a systematic process that aims to identify the skills that actually exist within a particular workplace, and compares these to the skills that are, or will be, required for that workplace. Skills audits are a valuable strategy for initiating change in establishing a well trained workforce who matches appropriately to jobs.



Aligning Key Legislation with Education and Training

The Figure above illustrates all the actions to be taken when aligning the SAQA Act, the Skills Development Act and the Employment Equity Act with education and training.

Key Stages to Skills Audit

There are three key stages to a skills audit:

Step 1: Determine Skills Requirements. Determine what skills each employee requires

Step 2: Audit Actual Skills. Determine which of the required skills each employee has

Step 3: Determine Development Needs and Plan for Restructuring, analyse the results and determine skills development needs

A gap analysis is the outcome of the skills audit process. The information that is obtained will enable the organisation to compile a comprehensive and

meaningful training needs analysis. Information that is provided through the skills audit can be used for the following:

- Training and development to individuals to cater for the skills gaps
- Internal employee selection. Ensure that the correct person is deployed in each position
- External recruitment and selection
- Performance management
- Succession planning

Benefits of Conducting a Skills Audit

Key benefits of conducting a skills audit include:

- Improved skills and knowledge.
- Lower training and development costs because development efforts are more focused.
- Information that can be used for purposes such as internal employee selection and placement.
- Increased productivity as people are better matched to their positions

The results of a skills audit can be reported for each division to show individual and divisional competency gaps against competency needs. This in turn, assists in the collation of a WSP that complies with the provisions of the skills development act and SETA regulations.

Skills Audit in the Context of SAQA Legislation

Competence in this new paradigm is defined as:

“Applied Competence is the union of practical, foundational and reflexive competence”. (Source: Guidelines for the Assessment of NQF Registered Unit Standards)

It is broken down as follows:

Foundational Competence - The demonstrated understanding of what the learner is doing and why. This underpins the practical competence and therefore the actions taken.

Practical Competence - The demonstrated ability to perform a set of tasks in an authentic context. A range of actions or possibilities is considered and decisions are made about which actions to follow, and to perform the chosen action.

Reflexive Competence - The learner demonstrates the ability to integrate or connect performance with understanding so as to show that the learner is able to adapt to changed circumstances appropriately and responsibly, and to explain the reason behind an action.

Competence includes the individual's learning, understanding and ability to transfer and apply learned skills and knowledge across a wide range of work contexts.

It is important to identify the key strategic competencies of the organisation and the related strategic competencies for each division. This places a focus on how each job in the organisation and division contributes to the achievement of the company's objectives.

Strategic competencies may relate to areas such as customer service, E-business, market share and innovative products, amongst others.

It is the responsibility of the compiler of the skills matrix to identify the various specific competencies for each job/ role under these strategic competency headings. The skills audit identifies whether an individual has demonstrated behaviour that provides evidence of such competence. The skills audit aims to establish an individual's current level of competence in the workplace, against the identified skills matrix.

Skills audits may be conducted in a number of ways. Approaches include:

- A panel approach
- A consultant approach
- A one-on-one approach

The panel approach is regarded as the most valid and fair method of conducting skills audit. The audit must be conducted in a fair and open fashion, where the employee is provided with ample opportunity to provide evidence and discuss the findings, in relation to their own self-audit.

Panel Skills Audit

The following process should be followed:

Step 1: Preparation

- Panel members are selected based on their knowledge of individual employees and auditing skills, and trained.
- The panel team schedules a date, time and venue to conduct the skills audit. Allow at least thirty minutes per individual employee. Each panel member is to familiarise him or herself with the skills matrix competencies, including the distinction between linear, intermediate and complex levels.
- Each member must review the completed self-audit forms

Step 2: Complete Skills Audit Form

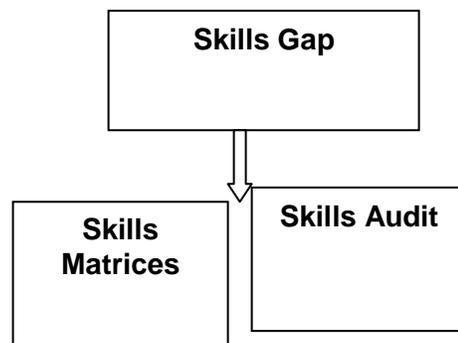
- Work through the skills audit tool/ form for each employee allocated to your panel
- Discuss each item and rate the individual against the scale provided.
- Where necessary, i.e. if panel members disagree on a particular rating, provide comments in the appropriate column. This may include comments such as: 'displays competence but not at the established level for the specific position' (i.e. linear, instead of complex competence), or 'Employee does not display competence due to ...' etc
- Where no agreement can be reached on a particular rating, identify specific further evidence that the employee will be asked to produce that

- proves competence. Ensure a panel member takes responsibility for information and following up with the aforesaid employee.
- If an individual has produced evidence of competence, evaluate this evidence against the VACCS checklist
 - Is the evidence Valid?
 - Is the evidence Authentic?
 - Is the evidence Current?
 - Is the evidence Consistent?
 - Is the evidence Sufficient to inform rating decisions?
 - Take the employee's self rating and possible distorted self-perception into account at all times
 - Once completed, feedback must be provided to the employee that allows for open discussion of the skills audit ratings. Agreement must be reached with the employee. It is recommended that the employee's manager provide this feedback.
 - Prior to sending the results to the relevant person, ensure that all panel members, as well as the individual employee sign off the form.
 - Principles of good assessment should be adhered to at all times.

Conducting a Skills Gap Analysis

Once the organisation has a clear picture of where it is in terms of skills (skills audit), and a clear vision of where it needs to be in terms of strategic development (skills matrices), what remains to be done, is to conduct a gap analysis.

Skills development is one method for addressing deficiencies that have been identified. However, it is important to note that not all deficiencies are best addressed by training and education interventions. Also, the type of skills development activity to be used needs to be the most relevant to the skills being developed.



US15217: Develop an organizational training and development plan

6.DEVELOP A TRAINING AND DEVELOPMENT PLAN - WORKPLACE SKILLS PLAN

The Role of the SDF

The Skills Development Facilitator (SDF) plays a major role in the compilation of the WSP with the Training Committee; it is also their responsibility as the SDF to submit the WSP to the applicable Seta. The SDF plays a major role in the compilation of the WSP to the Seta.

Involvement of Key Stakeholders

It is of utmost importance that the WSP be developed in consultation with employees from all levels of the organisation. Therefore, the WSP needs to be signed off by a number of parties, as you will shortly see. The actual consolidation of the WPS is very simple and you as SDF must ensure that you have a clear understanding of the format of the WSP as well as the expectations of the SETA about the information contained in the WSP. The content framework for the WSP. The content framework for the WSP does not differ much from one SETA to the next. The SDF should Endeavour to complete the WSP in as complete a manner as possible.

Considering priorities and addressing needs

The training and development (TDP) or workplace skills plan (WSP) should focus on addressing the priorities that have been identified first. One way of trying to ensure that this is done efficiently is to only make use of accredited training providers; otherwise the training will bear no credits and will as such add no value in terms of the financial resources expended. The organisation should also keep in mind that in today's world it is no longer enough to provide employees only with the skills they need to do their current job. The employee should also be provided with skills that he/she could use in future jobs, especially since very few organisations can today offer a "job for life". It is a fact that today most people will have three to four career changes in their working life.

WSP Preparation Checklist

In order to prepare for completion and submission of a WSP, companies need to complete a number of steps. The latest WSP Template and Guidelines documents can be accessed via the ETDP website, www.etdpseta.org.za.

The following information needs to be gathered, analysed and discussed. Certain decisions need to be made in terms of current training plans for the levy year:

1. Company details
2. Details of the Skills Development Facilitator
3. Details of the training committee or consultative forum involved in the development of the WSP
4. A total qualifications profile of all employees against NQF levels
5. Company strategic priorities for the year
6. Annual company skills development (education and training) priorities for current year

7. The NQF level planned skills priorities, i.e. the proposed level at which the course/ program/workshop is aimed
8. Beneficiaries of skill priorities related to occupational, population and gender groups
9. Nature of learning interventions, i.e. in-house, external, formal educational institution.

Analysis of Past Skills / or Training Plans and Records

1. Gather information relating to previous workplace skills or training plans and records.
2. Analyse and discuss these documents. List positive results of these documents and make use of these for future planning

Correlate Data Obtained and work through WSP Format

Obtain all information relating to your Seta's templates and guidelines. Correlate all information gathered.

Obtain Endorsement and Submit Plan to ETD P SETA

1. Obtain management and training committee endorsement.
2. Submit plan within Seta deadline.

Strategic business priorities must be accounted for in the determination of skills priorities. Business priorities refer to the interventions needed to ensure the development of the business and all the employees. Needs forecasting involves the analysis of internal and external conditions. It requires an understanding of future human resource requirements netted against future human resource availability.

In order to do strategic skills planning, the company must engage in Human Resource (HR) planning. HR planning describes the intended actions of the organisation to ensure that the organisation has the right number and the right

mix of people at the right time and place to efficiently achieve present and future Organisational goals. HR planning is a part of total business planning. HR environmental constraints and internal HR capability, and business managers must communicate their business needs for this plan to be functional and realistic.

PROJECT MANAGEMENT

The SDF as Project Manager

Project management is the planning, organizing, directing and controlling of resources for a relatively short-term objective that has been established to complete specific goals and objectives. Project management utilises a systems approach to management by having functional personnel assigned to a specific project.

Every project goes through five phases. These phases are summarized in the table that follows:

| Phase | Summary |
|---------------|---|
| 1. Initiation | Work with the client to determine the goals, objective and deliverables. This phase is ended with the construction of the Project Charter |
| 2. Planning | Work with your team in order to determine the WBS, task relationships and dependencies. You will also create a realistic budget |

| | |
|---------------|---|
| 3. Production | Finish a connected series of tasks in order to complete a deliverable |
| 4. Monitoring | Measure progress toward the goal and against the plan |
| 5. Completion | The final report is written, team members are reassigned and the project books are closed. This is also the time to learn from your mistakes, and celebrate your team's success |

Activities

The activities that should be performed in each project phase are indicated in the table below:

| | |
|----------------------|--|
| 1. Initiation | <p>Establish the goals.</p> <p>Develop rough objectives and deliverables</p> <p>Identify primary constraints (key elements that will restrict the project)</p> |
|----------------------|--|

| | |
|---------------------------|--|
| | <p>1. <i>Time:</i></p> <ul style="list-style-type: none"> a. How long is the schedule? b. Is the release date already set? c. Is there any flexibility <p>2. <i>Budget:</i></p> <ul style="list-style-type: none"> a. Is the amount of money you can spend already fixed? b. Does the organisation have uncommitted reserves? c. Is there any flexibility? <p>3. <i>Quality:</i></p> <ul style="list-style-type: none"> a. Are the required components already set? b. What are the customer's expectations c. What is the marketing position? <p>Establish project deliverables (tangible items such as products, processes, reports or events) based on the goals, objectives and expectations that you clarified with the client</p> |
| <p>2. Planning</p> | <ul style="list-style-type: none"> a. Assemble the project team b. Begin to set up the budget |

| | |
|-----------------------------|--|
| <p>3. Production</p> | <p>a. Create the deliverables that the client specified</p> |
| <p>4. Monitoring</p> | <p>a. Track budget usage; compare it to the percent of work completed</p> <p>b. Watch progress along the critical path; look for bottlenecks that would delay completion of the project</p> <p>c. Adjust the plan in response to activities and unforeseen complications</p> |
| <p>5. Completion</p> | <ol style="list-style-type: none"> 1. Notify vendors and suppliers of deadlines for submitting invoices. 2. Set a schedule for making final payments and closing the books 3. Release or reassign team members as the production curve begins to swing downward 4. Run the project post mortem 5. What went right during the project? 6. What went wrong during the project? 7. Write the project report, which includes: <ul style="list-style-type: none"> • Project Scope Document and Project Charter • Project schedule • Costs – Budget versus actual • Change orders • Recommendations for improvement |

| | |
|--|--|
| | |
|--|--|

Setting Goals

When you are creating goals, make sure that they are **S.M.A.R.T.**

Specific: Does everyone know what the goal really means? What do you actually want to achieve?

Measurable: Can the goal really be tested?

Agreed upon: Are you and the client in agreement as to what the goal means?

Realistic: Goals must be possible

Time limited: Precisely when does the goal need to be completed?

The scope of your work as SDF also follows a process. In the same way as a project needs a manager, so the cycle of claiming skills development levies will need close management by you as SDF. The skills development levy claiming process will now be discussed briefly to give you an indication of the scope of your work as SDF for your organisation.

US15232: Coordinate planned skills development interventions in an organisation

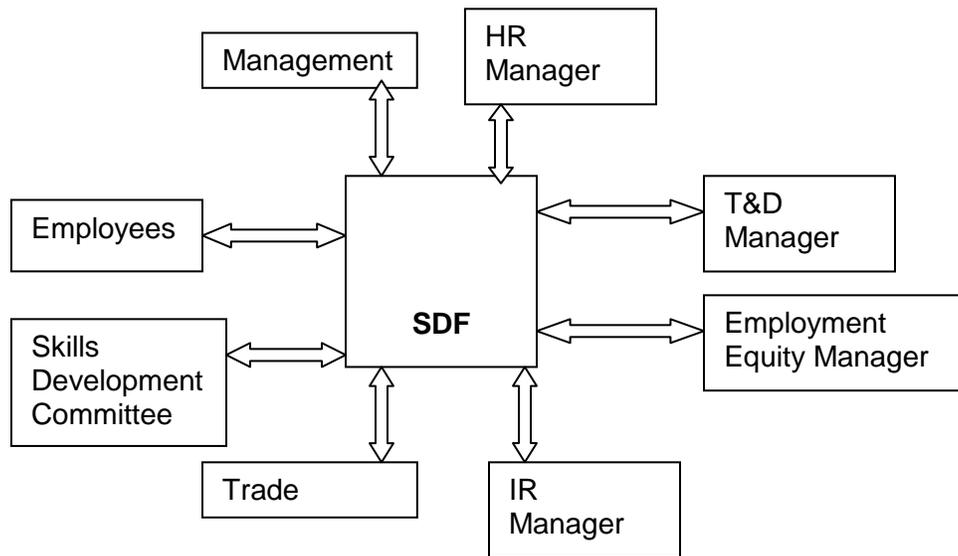
8. IDENTIFY AND PRIORITISE LEARNERS' LEARNING REQUIREMENTS

Introduction

The Skills Development Facilitator is the person who gives advice on and helps plan skills development for a workplace.

The professional SDF is in effect a consultant to the key stakeholders/role players involved in the skills development process.

KEY ROLE PLAYERS IN THE SKILLS DEVELOPMENT PROCESS:



Evaluating Existing Human Resource Structures

When evaluating existing human resource structures, a great deal of effort is put into new human resource efforts, but little energy is put into coordinating these efforts so that they reinforce one another. For this reason, career development programs must be integrated into the existing human resource structure; that is the policies, procedures, practices, or formal systems within the normal organisational umbrella of human resources, keeping in mind external structures put into place to guide the skills development process.

A career development system acts as a clearinghouse for collecting and sharing information that can increase the effectiveness of human resource decisions. A

career development system coordinates and better utilises a variety of seemingly separate human resource practices.

Individual Needs for Skills Development

The skills analysis should determine the following:

- Is the individual performing to standard?
- If not, what is the gap between the current and desired standard of performance?

Group Needs for Skills Development

The analysis process must include an investigation into the needs that are common to a number of people. This could include groups which are functioning together as a team and which perform the same kinds of work activities, or different people in the organisation who happen to have the same skills needs. Some key questions used to identify group needs are:

- What new categories of staff have been employed (e.g. telesales)
- Which groups are affected by changes that demand them to acquire the same new skills (e.g. to operate the new IT system)
- What skills do all employees need as a group?
- What groups of people need to be specifically targeted for skills development?

Issues that Need to be Considered in Relation to Training Solutions

There are a number of issues that have to be thought through before embarking on the design of new training interventions, including the following:

- Make sure that you have clearly described the actual skills (of head, hand and heart) that need to be acquired.
- Identify what you already have that can be used as resources in the training solution, e.g. existing programs or leaning materials
- Determine the nature and duration of the training intervention required, e.g. a five-day formal learning program focusing on theory or a three-day interactive and more practical work-based learning session.
- Identify whether any of your regular providers have suitable products that could be used or modified to address the identified need
- Make sure that the available programs and material are at the appropriate level and address the specific needs that were identified
- Determine whether the training solution can be presented as a skills program or learnership, which has many additional benefits for individuals and the organisation
- Prioritise the training programs that address critical organisation, group and individual needs that have to be addressed as soon as possible.

Criteria for Ensuring Quality of Learning Solutions

You need to ensure that the programs selected are put together in such a way that it results in a quality learning experience that develops the skills that were identified in the needs analysis.

Six criteria are provided that is useful in making decisions about the design of leaning programs or selecting appropriate programs.

1. The content and product

- Is the content of the program appropriate, complete and relevant?
- Is the product of the learning program appropriate?
- Is the program designed in such a way that the learner will actually be able to do what the program promises?

2. The outcomes-based approach

- What are the outcomes of the program?
- Are they appropriate for addressing the skills needs identified?
- Have the outcomes been clearly described so that the facilitator, assessor and learner understand what outcomes the program is designed to achieve?
- Which of the outcomes relate to registered unit standards, thus enabling learners to gain credits on the NQF for completing the program?

3. The level of the outcomes

- Are the outcomes pitched at the correct or desired level?
- Is the learning program appropriate to the level of work and intellectual complexity?

4. The process and methods

- Do the learning processes integrate appropriate activities and experiences?
- Are they anchored in appropriate and relevant content?

- Do they involve methods that are guided by the outcomes and standards described either in externally registered unit standards of performance?

5. The way assessment is handled.

- Are learners always assessed against the predetermined and clearly stated outcomes and assessment criteria?
- Is the assessment process fair, valid, reliable?
- Are learners assessed within the real context, or in simulated situations that are very similar to the environment in which they will have to demonstrate competence back in the workplace?

6. Quality of delivery.

This criterion relates to the quality of providers, and is important for insuring that you select providers that have systems and process in place that promote quality learning.

SETAs encourage organisations to select accredited training providers for the programs included in the WSPs, where these are available.

9. PLAN AND ORGANISE LEARNING INTERVENTIONS

Identifying Training Providers

- An accredited training provider is a provider who has registered with an ETQA and has completed the process of final accreditation.
- Other providers may have only received a provisional form of accreditation
- This is no reflection on the calibre of the training company if they have not yet received full accreditation.

Criteria to consider when selecting training providers:

- Depth of knowledge, understanding and skills appropriate to the services required.
- Approach to training, including aspects such as learner centredness and outcomes-based practices.
- Proven track record, financial viability and resources necessary for sustained involvement.
- Flexibility of service delivery, e.g. willingness and ability to adapt existing training schedule and products to meet the delivery requirements of training.
- Quality management system that is appropriate to qualify for ETQA accreditation for the services the deliver.
- Contextual relevance of their contribution to the specific training and learner, e.g. whether their learning material on financial management is relevant to the specific system used by the organisation.

Adapting career development to the Organisational culture

- It is important to consider the organisational culture when determining the best way to implement skills development in the organisation.
- The key characteristic of the culture must be discovered, so that these characteristics can be incorporated into any career development program.
- It is also important to discover which norms and practices are sacrosanct. This means searching for the culture, distinguishing its elements, pinpointing “the way we do things around here “ and unveiling patterns that mean business as usual.
- Only through such an investigation of an organisation's culture will you be able to identify the career development programs that have the best chance of chance of success because they are tailored to fit the organisation's patterns.

Four major data sources help us gain the sense of an organisation and how it is maintained:

- **People.** Talk to individual groups, particularly target groups, and ask them a series of structured questions.
- **Written documents.** Read the available literature, including annual reports, mission and objectives statements, business plans, newsletters, newspapers, letters from the president, policy manuals, reports and personnel statistics.
- **Human resources structures.** Examine the structures already in place, including performance appraisal systems, job postings, training and development programs, and plans for succession and compensation packages.
- **Informal systems.** Observe and note the general landscape, including workflow and communication patterns.

CO-ORDINATE LEARNING INTERVENTIONS

Once the workplace skills plan has been compiled and submitted, the skills needs must be effectively developed.

This requires the participation or at least support of all role players, even those outside the organisation. Consideration must be given to the manner in which these learning interventions will be implemented and the systems that will be put in place to record and manage the information that will be required in the Implementation Report.

There are numerous types of learning interventions that organisations can use, such as contact learning, on-the-job training, coaching, mentoring and many more. Whatever the training intervention, the approach should always be **outcomes based** and aimed at the improvement of competence of learners.

A framework for viewing employee interventions separates them into three general approaches or broad categories:

- **Group activities.** Interventions in which individuals work in groups to learn. Classroom-based learning interventions, workshops and project teams are part of this category.
- **Support-oriented activities.** Interventions where one individual assists another, such as on-the-job training, coaching and mentoring will fall under this category.
- **Self-directed activities.** Interventions in which an employee working strictly alone can undertake activities. Structured self-study manuals and programs, background reading and computer-assisted learning will form part of this category.

Record Keeping

As SDF, it is important that your records be kept up to date. You will have a personal set of records that you keep according to your project plan, and the records for training interventions will be kept by the organisation in line with SAQA and ETQA regulations.

IMPLEMENT LEARNERSHIPS

What is a Learnership?

A Learnership is a structured process for acquiring theoretical knowledge and practical skills within the workplace. Learners learn on the job and they obtain a nationally recognised qualification on completion of a Learnership.

Learnership strives to align training interventions (courses) more closely to labour market needs.

Learnerships are designed to address skills shortages in South Africa as identified by industry, providers and learners themselves.

A Learnership must:

- Relate to an occupation
- Consist of a structured learning component
- Include practical work experience
- Lead to a qualification

Benefits of Implementation Learnerships

Implementing Learnerships will prove beneficial to the organisation as a whole. For employers, benefits include:

- A better skilled workforce
- Systems in place for skills development within the work force
- Skilled learners who will contribute to the economic growth and development of the country.

Learnership Implementation process

1.

- Identity Learners
- Identity Learnership
- Apply for discretionary grant from Seta
- Identify training providers

2.

- Train Assessors
- Train coaches/Mentors

3.

- Train Assessors
- Train coaches/Mentors
- Enroll learners
- Sign three party agreement
- Develop a workplace learning schedule
- Implement Learnership

4.

- Prepare for SETA site visits
- Record Keeping

5.

Monitor Learning Progress

6.

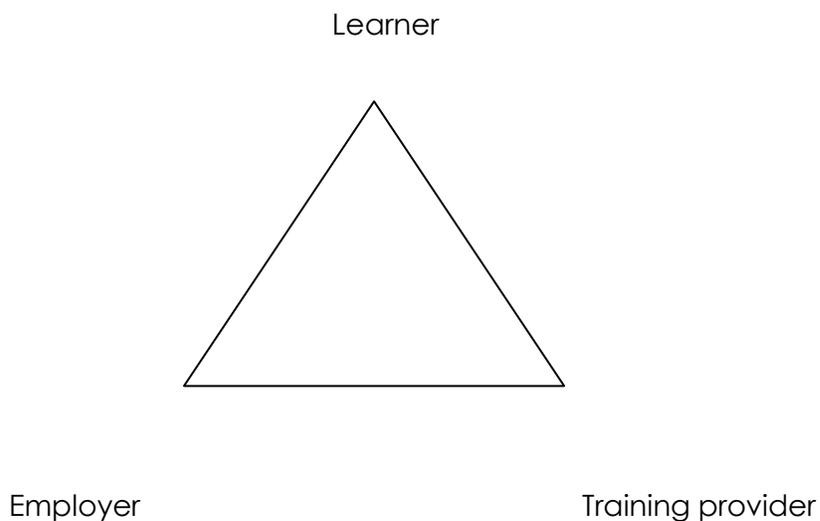
- Submit learner reports to relevant role players
- Obtain national certificates program

Employer's Role

Strict procedures have to be followed when implementing a Learnership. The employer needs to ensure that he/she complies with the following:

- Assessment processes/ system for Learnership implementation are aligned with the SETA ETQA
- Contractual issues, learner workplace support and guidance, workplace readiness, selection of learners, costs and learner allowances are in place.
- A Learnership Agreement is entered into with both the provider and learner
- The employer initiates and participates in the registration, development, preparation for, implementation of, monitoring and evaluation of Learnerships.

Learnership Agreement



Rights and Obligations

The Learnership Agreement extends rights and obligations to both employer and learner.

Learner's rights include:

- The right to adequate training and education as set out in the Learnership Agreement.
- The rights to negotiation – the timing, location, how the Learnership will take place, and who will do the assessment, are open to negotiation.
- The right of access to all resources that are required and to quality training.
- If the learner is dissatisfied with the quality and standard of training, he/she may (provided enough motivation is given) take it further by following the procedures and mechanisms laid down by the SETA.
- A learner may give up his /her Learnership to another registered training provider if the current training provider is dissolved, insolvent, or de-registered.
- The right to a proper assessment of his/her performance in training and is allowed to see his/her assessment results.
- A learner may continue training (provided his/her responsibilities are fulfilled) until the period specified lapses or until he/she meets the outcomes for the required unit standards, whichever comes first.
- The right to certification upon completion of his/her training program.
- The right to a fair hearing in the case of disciplinary matter.

Employers can expect the following from the learner:

- The learner must work for the employer as part of the Learnership practice. If the learner fails to do so, the employer may ask the SETA to terminate the Learnership Agreement and the employment contract.

- The learner must be available for all learning and work experience as stated in the Learnership Agreement or employment contract.
- The learner must attend all study and learning sessions with the specific training provider and work diligently
- If the learner fails to do so, the training provider may recommend that the employer start disciplinary procedures which could lead to the end of the Learnership Agreement and employment contract.
- The learner must obey the workplace policies and procedures such as arriving at work and the wearing the correct clothing etc.
- The learner must complete any timesheets or any written assessment tool given by the employer to provide related work experience.
- The learner must commit him/herself to lifelong learning.

The Learnership Agreements will terminate on the date stipulated in the Learnership Agreement. It will terminate earlier if:

- The learner successfully completes the Learnership;
- The learner is dismissed by the employer for a reason related to the learner's conduct or capacity as an employee; or the employer and learner agree to terminate the agreement; or the SETA approves a written application to terminate the agreement by the learner or if good cause is shown, by the employer.

Supporting the Learner

The Learnership will only succeed if the learning environment is both supportive and enabling. Previously unemployed and employed learners may not be familiar with the nature of work and may require additional support. This should be provided by mentors and coaches

Mentors

Mentors must be multi-skilled and fulfill a number of roles including that of:

- Sponsor
- Teacher
- Coach
- Sounding board
- Counsellor
- Buffer between the learner and the organisation
- Information provider
- Deliverer of painful home truths

The mentor's role is to:

- Facilitate learning
- Enhance the learner's analysis of situations in the workplace
- Unlock an individual's own potential to maximise their performance and
- Influence the learner in achieving important goals.

Coaching

Coaches also play an important role within the workplace. In order to coach effectively coaches need to:

- Build on the learners strengths and self confidence
- Provide the learner with the freedom and independence to do the job without you, challenge them to come up with their own solutions to problems
- Set standards and make performance expectations clear and specific
- Guide learners to follow the organisations values and rules
- Encourage the learner when he/she is discouraged

- Provide appropriate training and support when needed and be available for questions and concerns
- Serve as a good role model lead by example
- Maintain confidentiality
- Explain reasons for decisions and procedures and provide advanced warning of changes wherever possible
- Give learners credit and praise learners for work well done
- Not blame the learner when the learner makes mistakes
- Empower learners to take control of their own development

Evaluating the Impact of the Learnership

The overall success of the Learnership project needs to be evaluated. The Learnership will be deemed successful if:

- The learner achieves competence within stipulated time frame
- The Learnership has led to an increase in productivity levels
- Current employees have been able to progress in their career
- The learners have found placement following the Learnership – i.e. are more employable

The employer should identify the criteria for success at outset: these needs to be clearly understood by the learner.

Managing Information

Systems must be in place to monitor progress. Information collated on the Learnership will be important for feedback and also for evaluating the Leadership's overall success.

Originals or copies should be kept of the following:

- Learner Agreements/contracts
- Standards forms and reports (seta, employer or provider specific)
- Assessment guides
- Training manuals
- Employment contracts
- Code of conduct
- Certificates
- Grievance and appeal discussions/proceedings
- Progress reports
- Placements records

Compiling Reports

Details of assessments need to be recorded in line with ETQA requirements. All records should be kept especially for appeal processes. The assessment results need to be recorded and both the learner and assessor need to sign the records. Moderators may request to view assessment reports.

When compiling reports it is necessary to ensure that:

- The data is valid and reliable
- The information is thorough and convincing
- Recommendations are practical and achievable
- Stakeholders suggestions and recommendations are included

10. REVIEW AND REPORT ON LEARNING INTERVENTIONS

SWOT Analysis

Elements of SWOT analysis

Without clear analysis your organisation's workplace skills plan you will not be in a position to contribute clearly and correctly on factors impacting on the sector. It is therefore important for you to do a proper analysis of the workplace skills plan implementation and the learning interventions you have implemented within your organisation and to determine the strengths and weaknesses of the interventions. A simple, yet effective way of doing this is to draw up a SWOT analysis.

SWOT analysis is a very effective way of identifying your strengths and weaknesses and of examining the opportunities and threats your organisation faces. Carrying out an analysis using the SWOT framework helps you to focus your activities into areas where you are strong and where the greatest opportunities lie.

In relation to the workplace skills plan, it does this by assessing the organisation's Strengths (what an organisation can do in terms of skills development) Weaknesses (what the organisation cannot do) opportunities (potential favorable conditions for the organisation) and Threats (potential unfavourable conditions for the organisation).

Once this is completed, SWOT analysis determines if the information indicates something that will assist the organisation in accomplishing its objectives (strength or opportunity), or if it indicates an obstacle that must be overcome or minimised to achieve desired results (weakness or threat), which in turn will have an effect on the learning interventions you select to address the skills needs in your organisation.

Strengths and Weaknesses

Relative to market needs and competitors characteristics, you must think in terms of what strengths and weaknesses exist internally within an organisation or in key relationships between the organisation and its customers. When writing down strengths it is imperative that they be considered from both the view of the organisation as well as from the customers that are dealt with. A well-developed list of strengths should enable you to identify factors that you as an organisation can capitalise on to get an edge in the market.

A well-defined SWOT analysis may also uncover an organisation's potential weakness. Although some weaknesses may be harmless, those that relate to specific customer needs should be minimized if at all possible. Weaknesses should also be considered from an internal and external point of view. It is important that listing of an organisation's weaknesses is truthful so that they may be overcome as soon as possible.

The role of the internal portion of SWOT is to determine where resources are available or lacking so that strengths and weaknesses can be identified. From this the SDF can then develop strategies that match these strengths with opportunities and thereby create new capabilities which will then be part of the SWOT analysis. At the same time the SDF can develop strategies to overcome the organisation weaknesses or find ways to minimize the negative effects of these weaknesses.

Opportunities and Threats

Managers who are caught up in developing strengths and capabilities may ignore the external environment. This could lead to an efficient organisation that is no longer effective when changes in the external environment prohibit the organisations ability to deliver value to its targeted customers. These changes can occur in the rate of overall market growth and in the competitive economic, political/legal and technological or socio-cultural environments.

Social and cultural influences cause changes in attitudes, beliefs, norm, customs and lifestyles. An organisation's ability to foresee changes and provide training in these areas can prove beneficial while failure to react to these changes can be devastating. Regulatory actions by government agencies often restrict the activities of companies in affected industries, for example, the new skills levies and training-related legislation introduced. The organisation must not just look at the negative impact but also see the opportunities arising from these laws to make the most of the situations. It is important to identify political/legal threats and opportunities in order to keep an edge on the market.

Various elements within an organisation's internal environment can also have an impact on marketing activities. Changes in the structuring of departments, line of authority, top management or internal political climate can create internal weaknesses that must be considered during the SWOT analysis as well as in the development of workplace skills plan.

| SWOT Analysis Template: | |
|---|--|
| STRENGTHS | WEAKNESSES |
| <ul style="list-style-type: none"> • Capabilities? • Competitive advantages? • Resources, assets, people? • Experience knowledge data? • Financial reserves? • Innovative aspects? • Local and geographical? Accreditation qualifications certification? • Cultural attitudinal behavioural? | <ul style="list-style-type: none"> • Gaps in capabilities • Lack of competitive strengths? • Reputation presence and reach? • Own know vulnerabilities? • Timescales, deadline pressures? • Cashflow? • Reliability of data? • Accreditation etc? • Processes and systems etc • Management succession? |

| OPPORTUNITIES | THREATS |
|---|---|
| <ul style="list-style-type: none"> • Market developments? • Competitor's vulnerabilities? • Industry or lifestyle trends? • Technology, development and innovation? • New markets? • Global influences? • Business and product development? • Information and research? • Partnerships agencies? • Seasonal weather fashion influences? | <ul style="list-style-type: none"> • Political legislative effects? • Environmental effects? • Market demands? • New technology services ideas? • Vital contracts partners? • Sustaining internal capabilities? • Obstacles faced? • Insurmountable weaknesses? • Loss of key staff? • Economy - home and abroad? • Seasonality weather effects? |

It is important to compile a table such as the one above relevant to your own organisation and address the issues raised in the example or add to it with issues unique to your own organisation. This should leave you with a comprehensive list of strengths, weaknesses, opportunities and threats that can be linked to the skills development that took place during the course of the year. This should enable you to determine issues that need to be addressed in the workplace skills plan for the year ahead.

Always remember that you are doing a SWOT analysis on the workplace skills plan submitted for the year and the training interventions you have presented.

Improvements of learning interventions

When you conducted some form of evaluation you will find there were aspects that could be improved on for the next cycle of planning. You need to determine how to go about making these recommendations:

- If certain things were not up to standard, how, to whom and in what form would you have these recommendations made?
- If certain aspects were up to standard, produced exceptional results and had a major impact, again: where how and who do you report to?

This means that you need to set up approved mechanisms to make recommendations out of the skills planning process. This must happen at the best time, with the people involved who can make decisions to support improvements. You must use the strongest ways available to communicate to the widest audience possible throughout the organisation what has happened well, what changes have come about as a result of implementing the workplace skills plan. This communication could also say how things will be done the next time around.

The following questions could be adapted into a checklist with a column for actions that need to be taken:

- What results from evaluation of the implemented plan and the planning process itself lead to recommendations for improvements?
- What is the most appropriate level and vehicle within the organisation for making recommendations?
- How should any recommendations approved and/or decided on be communicated?
- What structures, processes or systems need to be modified to ensure improvement during the next planning cycle?

US15227: Conduct skills development administration in an organisation

11.CONDUCT SKILLS DEVELOPMENT ADMINISTRATION IN AN ORGANISATION

COLLATE AND STORE DATA RELATED TO SKILLS DEVELOPMENT

Introduction

Throughout this section, we will look at how able the organisation is to implement the training that was planned in the workplace skills plan, and how to report on progress made with skills development in the 12 months. Monitoring systems include the following:

- Project management systems are being correctly used.
- Ordering, receiving, delivering, checking systems are in place and being used - whether simple manual systems and IT-based systems.
- Keeping track of learner attendance, their submission of projects, assessment results, feedback provided to them etc
- Giving information to line managers and other representatives of groups who have a valid interest in the training.
- Feeding information into record systems to keep track of each planned intervention.

Remember that without careful monitoring, reporting becomes a nightmare and far less cost-effective.

Storage of Data

Every organisation will be required to demonstrate that they have a system and the facilities for maintaining and updating detailed information about members in training programs. This is essential in order to be able to meet the ETQA reporting requirements and should include the following learner information:

- Name and unique learner number (ID or SAQA generated number)
- Contact details
- Demographic information (age, race, gender, geographical location, occupation)
- Education and training background and experience
- Special learning needs e.g. interpreter needed, disability etc
- Additional learning needs (necessary experience and knowledge of relevant technology)
- Resources factors (place and time of learning, access to resources including electricity and technology, financial resources for additional learning materials)
- Motivation for entering a program of learning
- Programs for which the learners is registered
- Performance during the program (internal and continuous assessment)
- Achievement during and at the end of the program (internal and external assessment, final assessment, award achieved)

In addition to enabling the ETQA and SAQA to maintain accurate information on national learner and learning profiles, this information can serve many of the quality requirements for the company including the evaluation of its policies and practices.

Knowledge of the learners and their needs is essentially what drives the purpose and policies of the company. This information is also used to design learning programs and learner support systems and services. Updating and reviewing this information in a formal and regular way allows the company to develop a flexible and learner-centred approach to training.

Learner Confidentiality

One of the issues that must be borne in mind by all companies, both in designing systems to store learner information and for reporting, is that of learner confidentiality. Such systems should be designed taking the needs of different users into account.

Reporting and information storage requirements need to address at least two broad groupings. The first grouping deals with quality assurance. The first user would be the learner him/herself. Then, in direct relation to the quality of the learning interaction, would be the teacher, tutor, lecturer or trainer. Closing the information loop would be the company.

The information transfer to the SETA needs to be designed with the security of the learner information in mind. Companies have to have policies in place for the learner information they release.

With respect to reporting on learners and learner achievements, the constitutional right to privacy needs to be taken into account when designing what and how information will be stored for each learner.

Monthly report format

The following is an example of a monthly report format based on learning outcomes (taken from 'The nuts and bolts business series: Managing learning processes and quality):

For month of May 200x

Outcomes achieved (successfully assessed.)

- Qualifications

Level 3

Level 4

Level 5

- Unit standards

Level 3

Level 4

Level 5

- Learning outcomes in individual programs not reflected in any of the previous figures

Level 3

Level 4

Level 5

- No. of learners with learning programs
- No. of learners who have been assessed for:

Qualifications

Unit standards

- Learning outcomes
- No. of learners who engaged in a structured learning intervention
- No. of learners who were engaged in workplace experience (based on registered learning programs)
- No of learners who have made little progress in the review period

Problems encountered

Costs related to learning during May 200x

- Direct
- Indirect
- Assessment

Performance benefits reported

From a management perspective, such a report gives a clear indication of the level of activity, the level of progress, measures of effectiveness, etc. It becomes easier to manage the learning process simply because the focus is on the outputs which are quantifiable.

Continuously drawing up reports such as the one mentioned above will help you as skills development facilitator to determine the impact of the training and development the organisation engages in on the performance or productivity of the organisation.

PROVIDE INFORMATION RELATED TO SKILLS DEVELOPMENT

Annual Training Report

Submitting the annual training report is an administrative procedure. You need to fall back on the policy and procedure of the SETA to which you are affiliated. Before submitting the report, it is important to establish that you have completed each section correctly and comprehensively. Only organisations that have completed workplace skills plan to claim a planning grant will be eligible for an implementation grant.

Remember that submission of the annual training report will enable the organisation to access funding when participating in Skills Development Act processes. Now, let's have a look at the format of the workplace skills plan report:

Section A: Administrative details and organisation profile.

The template requires you to give the name of the organisation, skills levy number, addresses and general contact details of the organisation. It also requires private organisations to provide the total number of employees and total annual salary payroll.

Section B: Skills development facilitator details.

As with the workplace skills plan, various questions are asked to establish the profile of the skills development facilitator within the organisation, such as personal details, period of time functioning as SDF, registration as SDF, etc.

Section C: Employment profile.

This section (also similar to the workplace skills plan) seeks to obtain information regarding the employment profile of members in the organisation. Once again, occupational groups must be reported on in respect of race, gender, and disability profile.

Section D: Report on training provided to beneficiaries.

This table must be completed in order to record which beneficiaries received training by learning programs. Once again, occupational groups must be reported on in respect of race, gender and disability profile and reported on by course name. Actual cost must also be noted, whether internal or external. The section also has a table on variances of training provided against the workplace skills plan. After starting what training has taken place throughout the year, you must now state what the differences are between the training planned and training implemented. This will give the SETA an idea of the organisation's ability to implement training and bring to their attention any problem areas that might exist within the sector. Cost factors are also addressed.

Section E: Annual training report development.

This section requires you to describe the process used to develop the training report on how the workplace skills plan was implemented.

Section F: Employment equity compliance, consultation and authorisation process.

This section seeks to establish what the organisation is doing about employment equity and also what the composition of the training committee is. Details regarding the training committee as well as the skills development facilitator must be supplied and members of the committee must sign the report.

CONTRIBUTE TO THE IMPROVEMENT OF SYSTEMS AND PROCEDURES

Identification of problems and improvements

In organisations, the future continuous improvement is crucial and this is true for the information management system as well. It might be a good idea to keep a register with the person who is responsible for managing the information system where individuals seeking information can record shortcomings in the system. This can range from the time needed to access information to information that is lacking in the system. The SDF should revise this register frequently and provide feedback to relevant parties with regards to improvements to be made. However, these improvements should be within limits and should always take cognisance of the principles of confidentiality.