

**WORKPLACE LEARNING AND THE WORKPLACE EDUCATOR:
A SOUTH AFRICAN RETAIL STORY**

by

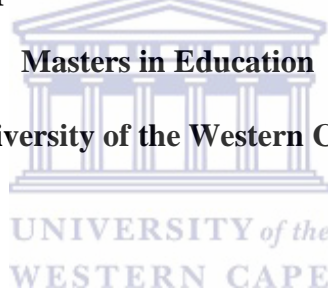
Simone Pedro

2972595

Research paper submitted in partial fulfilment of the requirements for the Degree of

Masters in Education

University of the Western Cape



Supervisor: Professor Zelda Groener

November 2013



UNIVERSITY *of the*
WESTERN CAPE

TABLE OF CONTENTS

	<u>PAGE</u>
Keywords	i
Abstract	ii
Acknowledgements	iii
Declaration	iv
List of acronyms and abbreviations	v
Section 1: Introduction	1
Section 2: Literature review/Conceptual framework	6
Section 3: Research design and methodology	30
Section 4: Data analysis: Presentation and discussion	36
Section 5: Summary, recommendations and conclusion	53
Section 6: Bibliography	62
Section 7: Appendices	77





UNIVERSITY *of the*
WESTERN CAPE

KEYWORDS

Academic qualifications

Competencies

Human resource development

Professional qualifications

Vocational learning

Vocational qualifications

Workplace educators

Workplace learning

Workplace trainers

World of work





UNIVERSITY *of the*
WESTERN CAPE

ABSTRACT

This study investigated how workplace educator development programmes prepare workplace educators for their roles and responsibilities in facilitating learning in the workplace. Framed by the literature, the research shows that workplace educators' qualifications prepare them for facilitating learning in the workplace. The most important findings show that their qualifications have prepared them for their roles and responsibilities in facilitating transformative learning within the workplace. Furthermore, the findings show that their qualifications, roles and responsibilities in facilitating learning in the workplace also impacted on workplace educators' own thinking, prompting them to question their own values and beliefs. This perspective transformation allows for workplace educators better facilitating transformative learning in the workplace.



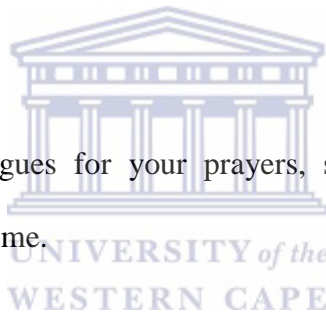


UNIVERSITY *of the*
WESTERN CAPE

ACKNOWLEDGEMENTS

I would like to express my sincerest gratitude and appreciation to the following individuals for their invaluable contributions and assistance:

- First and foremost all Honour, Glory and Praise to my Lord and Saviour, Jesus Christ for His blessing and granting me the necessary courage, strength, good health, patience and the perseverance to complete this degree. I stand in awe of Your mercy and grace.
- To my parents, brother and family for your unconditional love, patience, encouragement and support. I love you.
- To my friends and colleagues for your prayers, support and encouragement. Your friendships are very dear to me.
- To my supervisor, Professor Zelda Groener, for her leadership.
- To the participants in my research: you know who you are – your cooperation is greatly appreciated.





UNIVERSITY *of the*
WESTERN CAPE

DECLARATION

Herewith I, the undersigned declare that the work included in this research paper titled, 'Workplace learning and the workplace educator: a South African retail story', is my own original work that has not previously, in its entirety or in part, been submitted to any university in obtaining a degree.

...SPEDRO.....

Simone Pedro

4 November 2013





UNIVERSITY *of the*
WESTERN CAPE

LIST OF ACRONYMS AND ABBREVIATIONS

Cape Peninsula University of Technology	CPUT
Education Training and Development	ETD
Human Resource Development	HRD
National Qualifications Framework	NQF
Organisational development	OD
Skills Development Facilitator	SDF
South African Qualifications Authority	SAQA
United States of America	USA
University of the Western Cape	UWC
University of Cape Town	UCT
University of Johannesburg	UJ
University of South Africa	UNISA
Workplace Learning and Performance	WLP



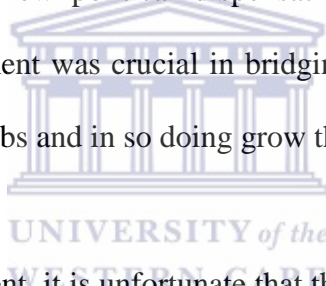


UNIVERSITY *of the*
WESTERN CAPE

SECTION 1: INTRODUCTION

Context and background

The history of South Africa is marred by the apartheid regime during which legalised inequality amongst South Africans of different races was common practice. This is supported by Daniels's (2007, p.1) assertion that "South Africa's skills policy administration is closely linked to South Africa's history as an apartheid society"; the inheritance thereof is present in the labour market, and the post- 1994 efforts to mend the injustices of apartheid education. Growing up during this period means that I have vivid memories of examples of those inequalities. As South Africa transitioned from apartheid to a new political dispensation in 1994, there was a growing consciousness that skills development was crucial in bridging the gap between the inequalities of the past and the need to create jobs and in so doing grow the economy.

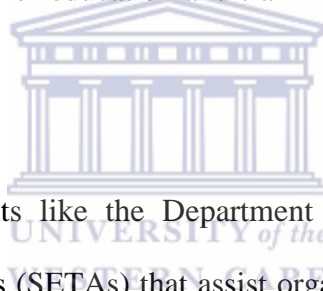


Within my own place of employment, it is unfortunate that the remnants of apartheid can still be seen in, for example, in the number of unskilled people, particularly black and coloured people, who do not have tertiary or even secondary education and currently occupy menial jobs within the organisation. Part of my job is to promote skills development in the organisation and assisting people to obtain a matric or further education qualification. The Department of Labour (DoL) in a Scarce and Critical Skills Research Project (2008) identifies the National Qualifications Framework (NQF) as being implemented so that those previously disadvantaged by not being allowed to receive formal qualifications, could now gain access to education. In this way, those previously excluded could gain qualifications and recognition for prior learning, thereby becoming integrated into the formal educational system. The decision to implement the NQF in South Africa – established by the South African government through the enactment of

the South African Qualifications Authority (SAQA) Act of 1995 – was influenced by similar advances in the late 1990s in Australia, New Zealand, Scotland, Ireland and England.

Overcoming the inequalities of the past, specifically related to education and training, culminated in the government's implementation of the Skills Development Act (No. 97 of 1998). One of the purposes of the Act is as follows:

“developing the skills of the South African workforce; encouraging employers to use the workplace as an active learning environment; encouraging workers to participate in learnership and other training programmes; improving the employment prospects of persons previously disadvantaged by unfair discrimination and to redress those disadvantages through training and education; and ensuring the quality of education and training in and for the workplace.” (Skills Development Act, 1998, p.4)



There are government departments like the Department of Labour (DoL) and the Sector Education and Training Authorities (SETAs) that assist organisations in up-skilling employees, especially those that have been negatively affected by the apartheid regime. My role is also to facilitate and coordinate this process in my place of employment. I am very passionate about skills development and find much reward in helping employees achieve their qualifications by implementing learnerships and skills programmes, mostly for persons previously disadvantaged by unfair discrimination, and striving to redress those disadvantages through training and education in the organisation. An example would be those employees having worked for the organisation for years without promotion due to lack of a qualification. The Skills Development Act (No. 97 of 1998, p.4) also decrees that the purpose mentioned above should be achieved by “encouraging partnerships between organisations, education institutions and the government of the economy to provide improved education and training in and for the workplace”. This partnership refers to the relationship that exists between the public education sector and the

private labour sector to provide such workplace education and training. This notion is supported by Marsick (1988) who indicated that the workplace is increasingly being recognised as a setting in which significant learning can occur. My research therefore focuses on training of adults within the workplace, also known as workplace learning, and the preparedness of workplace educators to facilitate this process.

As a training and development practitioner at a South African retail organisation, this research is very personal to me as I have also been, and continue to be impacted by the skills development strategy of South Africa. My career in the training and development field started about nine years ago, after completing my National Diploma: Human Resources Management at the Cape Peninsula University of Technology (CPUT), the Bellville campus which was then known as the Peninsula Technikon. Before South Africa became a democracy, only coloured and black students attended CPUT, but at the time that I was a student in the post-1994 period, it was no longer the case, although in some respects the stigma of apartheid still remains to this day. The level of education I received when studying was of an extremely high standard, and I subsequently went on to complete my B.Tech degree in Human Resources Management at the same institution. Management of training, one of my study subjects, cultivated my passion for the field, and a few years later, I completed another B.Tech degree, this time in Human Resources Development at the University of South Africa (UNISA).

Completing this degree part-time, while working in the field, assisted my development within the organisation where I was employed in at the time, as well as the way in which I carried out my roles and responsibilities. When I started in the training and development field, the majority of the training was provided by external training providers, but as new developments occurred within the field as well as the organisation, facilitation of in-house training became one of my roles. Learning about these new developments in my studies allowed me to use my knowledge

and skills within the organisation. One of my colleagues was also completing part-time studies, a Bachelor's Degree in Human Resources Management at the University of Stellenbosch, an institution that had allowed only whites students, during the apartheid regime. The question of how different or similar our learning was and how our qualifications prepared us for our roles and responsibilities, formed in my mind. It was not until five years later, that I could attempt to answer that question with this research paper.

I joined my current employer six years ago and since then, my roles and responsibilities have developed substantially. Much of the training is facilitated by my workplace which also develops the material. My success in these new roles has relied on the skills acquired during my studies. My current place of employment is more racially diverse than my previous one, and again I have had to rely on knowledge from my studies to help me in this regard. The question of how well my undergraduate qualifications prepared me for my roles and responsibilities arises periodically, and I have also wondered if these differ from those of my colleagues. Hence, my research question.

Research Question

How do workplace educator development programmes prepare workplace educators for their roles and responsibilities in facilitating learning in the workplace?

Aims

The aims of this research are (1) to determine if the qualifications have transformed workplace educators' perspectives; (2) how these qualifications prepared them to promote and facilitate

learning within the workplace; and (3) if the qualifications prepared workplace educators to engage in transformative workplace learning.

Overview of the paper

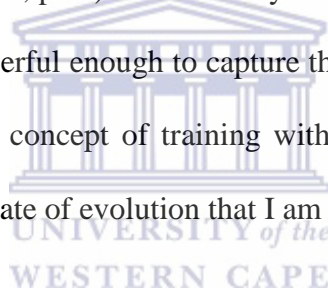
In this paper I review the literature on workplace learning, those responsible for workplace learning within the organisation, as well as their roles and responsibilities, competencies and qualifications. As I am also interested in finding out how qualifications prepare workplace educators for transformative workplace learning, my review included a focus on transformative learning theory. I describe my research design, followed by an analysis of the data that I gathered through administering a questionnaire. In the final section I present a summary, findings and recommendations.



SECTION 2: LITERATURE REVIEW/ CONCEPTUAL FRAMEWORK

Introduction

The literature which I review relates to adult learning in the workplace, also known as workplace learning, the different people within organisations who facilitate this learning, as well as how their qualifications have prepared them for their roles and responsibilities within the organisation. Merriam (2001, pg. 93) refers to “various theories or models of adult learning as being distinct in that each has been developed and promoted by adult educators interested in differentiating adult learning from the learning of children”. Having researched a number of theories, I agree with Merriam (2001, p.95) when she says that: “I doubt that there will ever be a single theory of adult learning powerful enough to capture the complexity of this phenomenon”. According to Marsick (1988), the concept of training within the organisation has evolved or shifted into learning and it is this state of evolution that I am interested in exploring.



As a facilitator of workplace learning, this has also been my experience in that adults learn in different ways and that I cannot simply use one method of facilitation to get learning across to the employees in an organisation. I have chosen to use transformative learning theory to frame my literature review, as its central theme is also about change and learning. This resonates with the change or transformation of the skills development, of which learning is a part, of South Africa, as I investigate my research question: “How do workplace educator development programmes prepare workplace educators for their roles and responsibilities in facilitating learning in the workplace?” Marsick and Watkins (2003, p.218), in creating themes about “transformative action learning as it affects both personal and organisational transformation, recognise that there are constraints in place that work against these transformations, such as a strong organisational desire to maintain the status quo and on an individual level, resistance to

change”. While my study is framed by transformative learning theory, I distinguish between *personal* transformation, which relates to how transformative learning has personally impacted the workplace educators and employees receiving training, and *organisational* transformation, which relates to the changes within the organisation. Before discussing transformative learning theory, I will first discuss transformative workplace learning, the elements involved therein, and the workplace educators responsible for the learning.

Workplace Learning

I have always been passionate about workplace learning, and especially the impact it can have on the individual employee, both for the organisation as well as on a personal level. In this research paper I use ‘workplace educator’ as a collective term to refer to trainers, learning facilitators and HRD practitioners. In the same way, ‘workplace learning’ is sometimes used interchangeably, in organisations, with terms such as training, learning and HRD. Within my place of employment, the training and development department provides internal and external training courses, skills programmes, organisational development (OD) interventions and learnerships, but these are all shaded under the umbrella of workplace learning. Numerous authors have discussed workplace learning and its associated matters at length. Ellinger (2005), Lohman (2005), Boud and Garrick (1999), and Sambrook (2005) see workplace learning as representing highly complex individual processes and organisational practices. This parallels Hodkinson and Hodkinson (2004), Sambrook (2005) and Barnett (1999) who agree that workplace learning is a relationship between working and learning, which are important processes central to human relations”.

Matthews (1999, p.19) takes a broader view of the definition of workplace learning, in emphasising,

“the importance of interpersonal and contextual influences, as was proposed by Marsick (1987, p.4, as quoted in NBEET¹, 1994, p.10) when she argued that workplace learning was ... the way in which individuals or groups acquire, interpret, reorganize, change or assimilate a related cluster of information, skills and feelings. It is also primary to the way in which people construct meaning in their personal and shared organisational lives”.

Similarly Holliday and Retallick (1995, p.7) stated that “Workplace learning refers to the processes and outcomes of learning that individual employees and groups of employees undertake under the auspices of a particular workplace”.

Barnett (1999) speaks of work and learning as having become interrelated, and that this interrelationship is evident at an organisational or personal level, either formally or informally. Learning in a workplace can be linked with formal training programmes that may result in some form of qualification or credits toward a qualification. In the South African learning and education context, such programmes are referred to as pivotal programmes. As Candy and Matthews (1998, p.14) note, “this tends to be related with the use of experts, in this case the trainers, who play a key role in transferring the required knowledge and skills to the workers”. In my experience, not all organisations invest in pivotal programmes and may regard on-the-job training or in-house training, as more important to the organisation.

The workplace is also a site for informal learning – where a formal qualification is not necessarily the aim – or incidental learning – where learning was not the primary goal but occurs nonetheless (Marsick and Watkins, 1990). Hager (1997, p.9) identifies “that research

¹ NBEET – National Board of Employment, Education and Training, Australia

evidence points to the value of both types of learning in the workplace and that it is important to maintain a productive balance between the two”. Following on, the role of the workplace trainer needs to take into consideration the different ways of organising learning in the workplace (Harris, Bone and Simons 1999, p. 1).

From a purely organisational point of view, Beattie (2006), Clarke (2005), Elkjaer (2004) and Smith (2003) define workplace learning as amongst others, attaining, using, and critically reflecting on knowledge to achieve organisational goals. Lee, Fuller, Ashton, Butler, Felstead, Unwin and Walters (2004) see workplace learning as carrying advantages for employers, employees and the Government. Within the literature this is understood by many as “improvements in performance and productivity” within the workplace (Ashton & Sung, 2002); “opportunities for personal and professional development” that may lead to job satisfaction and self-fulfilment (Matthews, 1999); and a move towards a society where there will be better jobs, equal opportunity for all and more skilled trained people to fill those jobs (Senge, 1991). This is similar to the purposes of the Skills Development Act of South Africa. However, these purposes may not simply be met by the recognition that learning occurs at work, but with the practical implementation of the Act within the organisation.

Workplace learning and training

Evans and Rainbird (2002, p.8) establish a relationship between training and the workplace and define it “as that learning which derives its purpose from the context of employment”. They make the distinction between training, which is narrowly focused on the immediate task and restricted to business needs, and learning, which addresses the needs of a variety of stakeholders. The distinction between training and learning is significant (Sutherland, 1998, p.5). Knapper and Cropley (2000) agree in the importance of differentiating between learning and training, as the latter is the traditional way employees have been prepared for tasks within

the organisation. Just as lifelong learning is a catchphrase for the 21st century, training used to be the lifelong learning of the last century. Similarly, Clarke (2005), Jacobs (2003) and Lohman (2005) also agree that workplace learning has been a topic of focus of HRD scholars and practitioners, and that formal training and informal learning have emerged as focal points.

Poell, Van der Krogt, Vermulst, Harris and Simons (2006) agree that the workplace has evolved into an essential learning environment (Jacobs and Jones, 1995; Eraut, 2000; Streumer, 2006). Studies investigating employee training and learning have discovered firstly, a shift in attention from formal training to informal training and learning in the workplace (Wenger, 1998; Billett, 2000). Secondly, the roles of formal workplace educators and trainers have been expanded to include other organisational role-players, such as colleagues and supervisors (Macneil, 2001; Ellinger and Bostrom, 2002). This resonates with my experience as a training and development practitioner in that when I started my career nine years ago, training mostly revolved around external training providers coming into organisations to facilitate learning. As my experience has grown to include the retail industry, there has been a distinct shift in how learning is facilitated. Employees within the organisation, myself included, moved into the role of facilitators of learning within the workplace.

Workplace learning, human resource development (HRD) and training

According to Rothwell & Sredl (1992, pp.45-64), when researching workplace education, the evolution of human resource development (HRD) must also be considered, as it “draws upon a wide variety of disciplines including economics, psychology, management theory, communications, the humanities, political science and education”. This link between the two concepts is supported by Nadler (1980, p.66) who “defined the term HRD as an organised learning experience within a given period of time with the objective of producing the possibility of performance change”. Years later McLagan (1989, p.7) expanded upon this interrelationship

to include “the integrated use of training & development, organisational development and career development to improve individual, group and organisational effectiveness”.

This marked a significant change in the field in that while “Nadler’s primary focus was on the needs of individuals to gain new skills or knowledge in order to improve their performance on the job, the latter definition emphasised the increasing importance of HRD practices to organisational success” (Rothwell & Sredl, 1992, pp.1-3). This resonates with my experience as HRD activities within my place of employment are managed traditionally by the Training and Development Manager or the Human Resources Manager. Meyer (2007, p.2) defines HRD as “all the processes, systems, methods, procedures and programmes an organisation employs to develop its human resources in order to equip its employees to be able to contribute to organisational performance”. He argues that HRD has advanced so much that ‘traditional training’ is at risk and has led to a situation where many organisations regard HRD as a critical factor in increasing competitiveness and performance and should therefore include such initiatives as well as developing people within the organisation (Noe, 2008).

Erasmus, Loedolff and Hammann (2010, p.39) describe a “serious skills gap in South Africa and suggests that the demand for quality education and training and competent and qualified human resource development (HRD) practitioners increases as people’s needs to acquire the skills necessary for employment grow”. In support of this statement, Ulrich, Brockbank, Hohson, Sandholz and Younger (2008) argue that “the human resource function should add value and make a meaningful contribution to employees and line managers inside the company, and to customers, communities, partners, and investors outside it. By the same token, it could be said that the HRD function should add value and contribute by equipping its employees with skills to help improve organisational performance” (Erasmus, Loedolff and Hammann, 2010, p.113). This relates to transformative learning in that the way to equip employees with the afore-

mentioned skills changes constantly, or the people within the organisation change rapidly and workplace educators need to take this into consideration.

Workplace educator development and Perspective Transformation

Changes in the skills development landscape in South Africa have necessitated changes in workplace educator development that influence personal transformation and organisational transformation. Due to changes in skills development legislation, workplace educators have had to adapt the way they work within the organisation (organisational transformation), and in so doing have needed to adapt their own views and perspectives (personal transformation). This change in perspectives amongst workplace educators has prompted me to include perspective transformation to frame my research. Workplace educators have to not only, keep the importance of workplace learning for the organisation in mind, but also the importance thereof for the employees. As workplace educators construct meaning in their own lives, it also overlaps into meaning from the organisation and learning therein. Workplace educators can foster such authentic relationships by motivating their learners to overcome learning barriers as a result of their disadvantaged past experiences.

Roles and responsibilities of workplace educators/trainers in workplace education

As a workplace educator or training and development practitioner by profession in the South African retail industry, understanding and nurturing of workplace learning practices and discourses remains one of my key roles and responsibilities within the organisation. In other retail companies in South Africa the job title may be training facilitator or trainer or learning practitioner. With these different or new job titles, new roles and responsibilities, such as learning facilitator, assessor and material developer, have also emerged. These roles, as well as the competencies needed to fulfil those roles, are similar to educators employed in schools, FET

colleges and universities. Therefore I refer to these positions within the organisation collectively as workplace educators. This echoes Ketter's (2006) answer to her own question, 'What's in a name?' by stating that the profession known as training, now claims more job titles than any other, and may range from an training instructor, learning practitioner to facilitator.

Harris and Simons (2000, pp.2-4) "identified five other key roles of the workplace trainer role: fostering an environment conducive to learning, working and learning with co-workers, structuring and shaping the work processes to accommodate learning, promoting independence and self-direction in workers, and linking external learning experiences with work and learning in the workplace". Traditionally, to become a workplace educator in South Africa, one had to study human resource management or human resource development, and the resultant job titles in this field can also refer to those terms. I have a B.Tech degree in Human Resources Development and am a training and development facilitator, while some of my colleagues have degrees in Human Resources Management, Industrial Psychology or occupationally directed diplomas in education and training. Similarly, some of my counterparts at other South African retail organisations have job titles that include learnership specialist, learning practitioner, learning facilitator, and skills development facilitator, to name a few.

Koorneeff, Oostvogel and Poell (2005) outlined human resource development responsibilities that include "training needs analysis, training program design and modification, planning and control, consultation and discussion, delivering training, controlling and assessing training, coaching, managing, or overseeing training, and acting as a resource" (Watson and Maxwell, 2007, p.32). Expanding on this, Franz (2005) explains that facilitators (or workplace educators) must be learner-centred, create learning environments, use a variety of facilitation methods and be able to critically reflect on their own learning. Wilson and Hayes (2000) add that by sharing their personal experiences, understanding and knowledge, adults learn by challenging each

other's thinking and activities. Based on my own experience within the industry, this is in line with factors that make an organisation conducive to workplace learning.

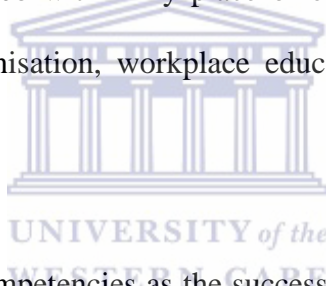
In my experience, organisations are always looking for ways to thrive in today's challenging economic times through effective human resource development strategies. As employees are the most valued asset for most organisations, workplace educators have used various training and development interventions to distribute knowledge within the organisation and, in so doing, obtain competitive business results for the organisation. To ensure that these interventions succeed, "researchers and practitioners have pursued the study of training transfer – applying knowledge and skills from training to the work setting – for decades" (Hutchins, Burke & Berthelsen, 2010, p.599). The deduction can then be made that to have the maximum effect on organisational performance, workplace educators not only need basic knowledge of training design and development, but also knowledge of how training can help learners apply (transfer) their learning on the job and improve organisational performance (Baldwin, T., Ford, J., & Blume, B., 2009). This supports the key roles of the workplace educator as identified by Harris and Simons (2000, p.2-4).

Competencies of workplace educators/trainers in workplace education

As the terms such as learning facilitator, training practitioner, trainer and HRD practitioner, among others have been collectively described as workplace educators, and having similar roles like assessing, developing material and facilitating learning, it is logical to deduce that they will need similar competencies to fulfil their roles and responsibilities. Leach (1996, p.1) conducted a study of trainers in business and industry in Illinois in the United States of America with the objective "to describe behavioural and attitudinal characteristics that differentiated exemplary trainers from average ones. The knowledge, skills, and roles required for success as a trainer working in business and industry are less well documented. However, there is growing

consensus of the knowledge and competencies required of trainers”. Leach (1992) compiled a profile of characteristics of training managers that are associated with excellent training in business and industrial settings (See Appendix B).

Lee (2006, p.53) describes how the “research of Chen, Bian and Hom (2005) used a replication of the 1999 Workplace Learning and Performance (WLP) model, as well as other studies conducted in Asia (Rothwell, W., Sanders, E., & Soper, J., 1999; Yoo, 1999; Peerapornvitoon, 1999), and aimed to provide current WLP concepts and directions to HRD practitioners in Taiwan”. I have chosen to include the competency groups and roles of the WPL model (See Appendix A) as these are some of the main roles of workplace educators, and resemble very closely my roles required in my job within my place of employment. In order to effectively fulfil these roles within the organisation, workplace educators require certain competencies critical to their jobs.



Kochanski (1996, p.4) defines “competencies as the success factors that enable the assessment, feedback, development and reward processes for individuals to take place”. Holmes (1992) also provides a useful definition of competence-based qualifications, in that they “are a statement about someone’s current capabilities rather than what they have done in the past”. Another study was conducted by Erasmus, Loedolff and Hammann (2010, p.39) to “determine the various main competency clusters required by HRD practitioners of South African-based business organisations, confirmed that HRD practitioners require five sets of competencies, namely business/management competencies, interpersonal competencies, personal competencies, intellectual competencies and a variety of technical competencies” (See Appendix C). The results of this study also “indicate the importance to the HRD practitioner of a variety of technical competencies. Certain main competency clusters, such as personal and interpersonal competencies, strategic HRD competencies, intellectual competencies, Education Training and

Development (ETD) needs analyses and administration of training, are more important in organisations in the opinion of younger employees, between 20 and 39 years of age than older employees, 50 years and older” (Erasmus, Loedolff & Hammann, 2010, p.39-40).

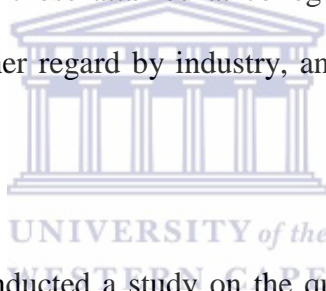
Of most importance in my job are the competencies of learning orientation and change which are training-related competencies; building and maintaining relationships and service orientation, which are interpersonal competencies; planning, organising, control and communication, which relate to more general business competencies; as well as problem assessment and decision-making which are analytical competencies. Based on these, together with the literature on competencies, I have included certain competencies to focus on in this research, as seen in my questionnaire which I administered for this study (See Appendix G).



Qualifications of workplace educators/trainers in workplace education

As discussed in the preceding section, in order for workplace educators to successfully fulfil their roles and responsibilities, they need to possess certain competencies to do so. Competencies can be developed through life-experience as well as through learning at primary, secondary and tertiary education levels. One of the aims of my research was to determine if the qualifications of workplace educators prepared them to optimally promote and facilitate learning within the workplace, by developing certain required competencies. Certain competencies like problem solving and self-motivation can be acquired while growing up, and in school or at tertiary education level. While school could lay the foundational learning, qualifications provide the further development of competencies required by organisations. While this research paper is particularly interesting to me, being a workplace educator, “research about qualifications and competencies of an effective trainer, is lacking and still difficult to predict” (Ye, 2000, p.5).

After Ye's deduction, Eraut (2002, p. 63-66) claimed that "the most common groups of qualifications for workplace educators, and those which receive by far the greatest consideration, are those taken either immediately before entering full-time employment, perhaps as apprentices or trainees or forming part of an uninterrupted sequence (except for gap-years) of qualification-based learning from the age of 15". He stresses that a few significant issues relate to the extent to which knowledge and skills acquired from academic learning can be transferred to the work context, how well tertiary education is considered to provide a good foundation for learning a new job; and the amount of work-based learning anticipated as necessary for acquiring competence within a role. Thus employers may use qualifications as general indicators of competence. In South Africa, a similar debate exists on whether qualifications from universities are 'better' than those attained at colleges or universities of technology or which qualification is held in higher regard by industry, and it is not a question that is easily answered.

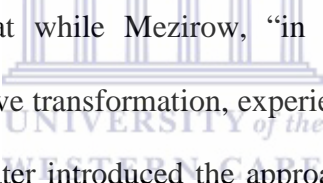


Gauld and Miller (2004, p.11) conducted a study on the qualifications of effective trainers in Australia and "an important demographic question sought to distinguish trainers with formal teaching/training qualifications from those without (See Appendix D) and indicates that a much greater number (76.2%) of participants indicated that they did not have any formal degree qualification in teaching/training". In contrast, Leach's (1996, p.51) study of American trainers found that, "Excellent vocational instructors in all three settings appear to possess similar educational attainment levels." For example, "43.6% of the trainers identified in business and industry have earned master's degrees and 8.9% had a Doctorate" (Leach, 1991, p.67). These findings are consistent with Olson's research (1994, p.67), where "89% of trainers in industry have a bachelor's degree, 41% a master's degree, and 13% a doctorate", based on studies reported by McCullough (1987) that were undertaken in 1985. Olson's (1994, p.72) study

revealed that, “The masters in education (63.6%) was the most common degree for technical trainers [workplace trainers]”.

Although many colleagues and counterparts work in a similar environment, we do not all have the same backgrounds and qualifications. We also do not all have the same roles and responsibilities and if this is the case, we don’t all address these in the same way. I would be very interested in understanding the content of the above-mentioned qualifications, and how it has prepared each of us, as workplace educators for our roles and responsibilities in facilitating learning in the workplace.

Perspective transformation



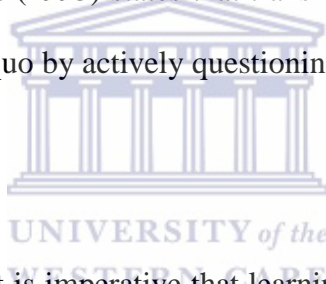
Karalis (2010, p.17) explains that while Mezirow, “in the late 1970s, asserted that the developmental process of perspective transformation, experienced many times by mature adults, would affect adult education, he later introduced the approach of transformative learning as a critical theory of adult education”. In the workplace, workplace educators are tasked with coordinating this learning amongst the employees, while the actual learning is the responsibility of the employee. These frames of reference could be anything from something learnt during childhood that is now being challenged in adulthood, or perceptions of others or the self.

An example of changing frames of reference arose when I was facilitating on Team Dynamics at one of our distribution centres in September 2012. Already at the beginning of the session, an employee told me that whatever I had to teach during the session would not change his work situation or perception of what teamwork is supposed to be. This employee clearly already had a set point of view, which I challenged during the two-day session. At the end of the session, his perspective on teamwork and his supervisors’ roles as well as his own role, had changed

significantly and he was willing to change his own behaviour for the benefit of the team, and the organisation as a whole. This change is described by Mezirow (1991) as perspective transformation, occurring when our thoughts or intellect can no longer adapt or adjust to a new experience. This change in perspective “takes place in order to help adults make sense of this and learn new ways to bring balance back into their lives” (Taylor, 1994, p.169). Eyler and Giles (1999, p.171) defined perspective transformation as “seeing issues in a new way” and being transformed or changed by new learning. Due to this new learning, a change in current perspectives or existing frames of reference leads to alternate or widened points of view known as learning transformation theory (Parke, 2004). It is clear from the above that perspective transformation took place in the example of my Team Dynamics session.

Mezirow (1991, 2000) defines how “transformative learning may lead adults to experience perspective transformation or a shifting of their ‘world-view’: becoming critically aware of how and why our assumptions have come to constrain the way we perceive, understand, and feel about our world; changing these structures of habitual expectation to make possible a more inclusive, discriminating, and integrating perspective; and, finally, making choices or otherwise acting upon these new understandings” (Mezirow, 1991, p.14). My experiences as a student as well as a workplace educator lead me to agree with Mezirow’s views on perspective transformation as I have changed certain of my own views and beliefs and have also witnessed a change in perspective in the people around me, for example the employees in my training groups. This is also seen in my training sessions when we engage in “making meaning from our experiences through critical reflection and self-reflection as the central thinking of Mezirow’s theory” (Dirkx, 1998, p.4). Dirkx (1998, p.3-4) also mentions that Freire’s (1970) theory of transformative learning “significantly influenced the development of a critical perspective in adult education (Collins, 1991; Welton, 1995) and is guided by a desire for political liberation and freedom from oppression”.

Due to South Africa's history, there are times when slow political liberation still prevents learning within organisations. As seen in the discussion about transformative learning in the workplace, discourse and dialogue are key factors in HRD interventions that promote transformative learning. Workplace educators have to be efficient in practices like dialogue and storytelling so that the workplace is an environment conducive to transformative learning. This is evident in the experience I have mentioned above, and I have experienced this many times before. During a training session on team dynamics, an employee had to reflect on his previous knowledge and experience of teamwork within the organisation, and critically evaluate his willingness to listen and consider the learning that I was facilitating. There was also continuous discussion about the learning, which was crucial in allowing for perspectives to change. To ensure openness to change, Argyris (1993) states that transformative learning guides those who are willing to challenge the status quo by actively questioning what they are doing and why they are doing it.



Within my place of employment, it is imperative that learning and development are driven top-down, as this better ensures the buy-in and commitment of employees to workplace learning. If the leaders do not support learning, challenge and question what they are doing and why they are doing it, learning will not take place within the organisation. Once everyone within the organisation understands that “there is an innate longing among all humans to make meaning of their daily lives ... it becomes imperative in adulthood that we develop a more critical world-view as we seek ways to better understand our world” (Taylor, 2008, p.5) and that these ways to better understand our world, can take place within the workplace.

Workplace educators, being facilitators of learning, are not exempt from learning and making meaning of their daily lives. This involves “learning how to negotiate and act upon our own purposes, values, feelings and meanings rather than those we have uncritically assimilated from

others” (Mezirow et al., 2000, p.8). Critical reflection then becomes an important catalyst to the changing of beliefs or perspectives in employees, leaders and those facilitating this learning or change. This is supported by Mezirow’s (2003, p.3) statement that “mindful transformative learning about a change of belief involves the recognition that an alternative way of understanding may provide new insight into a problem ... critical reflection on its supporting assumptions, validating the *new* belief ... and, taking action on the validated new belief”

With the huge focus on skills development during the last decade, it “seems that the South African government has established a policy and legislative framework to facilitate transformation of the corporate workplace, which in turn, could facilitate transformative adult education” (Groener, 2006, p.10). Cohen & Piper (2000) explain that “in order for perspective transformation to occur, recipients or learners need to be open to embracing change, while workplace educators need to focus on establishing and nurturing relationships with their learners” (Cranton, 2006). This applies not only to workplace educators, but also to the leaders and managers of organisations, and the employees they manage, as there are constant changes within the organisation that impacts workplace learning.

Personal transformation

As people, we begin learning as children and learning never really ends. We learn through our own experiences, through sharing experiences with others but also by observing others’ experiences. This is supported by Mezirow and Freire’s (1970) view that “knowledge as something that is constructed by the individual in relation with others” (Dirkx, 1998, p.4). By the same token, Boyd and Myer’s (1988) idea “of transformative learning is embedded within transformative education and shares a developmental view and a commitment to understanding and facilitating personal transformation” (Dirkx, 1998, p.6-7). In my experience, learning can

challenge one's personal beliefs and may even change it, thus leading to personal transformation. For example, only when I was a student at CPUT, I truly understood the history of South Africa's educational landscape and this transformed the way I viewed skills development. This resonates with Dirkx (1998, p.9) notion that "transformative learning is essentially a way of understanding adult learning as a meaning making process aimed at fostering a democratic vision of society and self-actualisation of individuals". The change in how I viewed South Africa's educational history and the skills development landscape led to wanting to explore this field further and is probably the reason I am in my current position.

With the implementation of the Skills Development Act in South Africa and the establishment of SETAs, organisations such as the one where I am employed, were compelled to transform its own training and development policies to redress the inequalities of the past. As transformation within workplaces took place, workplace learning suddenly took centre stage as training and further education was promoted within organisations and employees were given the opportunity to learn and educate themselves. This was not always an easy task as for most working adults, and especially those discriminated against in the past regime; it had been many years since they had last studied and they may have believed that they would never get another opportunity. This challenging of their beliefs relates to transformative learning theory, which Dirkx (1998, p.1) describes as having "emerged within the field of adult education as a dominant theory for understanding how adults learn".

Cranton (2006, p.23) takes a more detailed approach and defines transformative learning theory as "the process of examining, questioning, validating, and revising our perspectives in relation to the world." Referred to as the father of transformative learning, Mezirow (1996, p.162) asserts that "transformative learning offers a theory of learning that is distinctively abstract, idealized, and grounded in the nature of human communication. He adds that this is a theory

that is partly a developmental process, but more as learning is understood as the process of using a prior interpretation to construe a new or revised interpretation of the meaning of one's experience in_order to guide future action" (Mezirow 1996, p. 162). Merriam and Caffarella (1999) refer to it as a theory about change - change, dramatic or not, in how we see ourselves and the world around us.

In my experience, change is the only constant in life and the same applies to the world of work. As the SETAS implement new learning programmes, or change structures or guidelines that apply to workplace learning in the organisation, which happens fairly often, as a workplace educator, I have either to implement those changes within the organisation or adapt the organisation's training and development policies accordingly. For example, if the SETA changes the processes relating to the workplace skills plan that I submit on behalf of the organisation, I have to liaise with union officials and my managers to implement the changes within the organisation, as this is one of my roles as a workplace educator. Much of the growth in my career has been due to changes in the organisation or in the field of adult education, human resource development or training. This applies to most people in similar positions and is supported by Taylor's (2008, p.5) assertion that there is "an instinctive drive among all humans to make meaning of their daily lives."

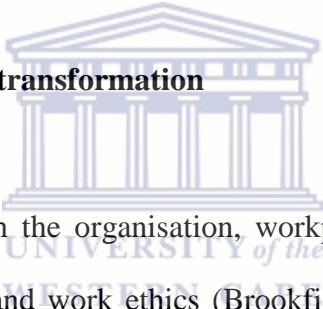
As change is continuous, what we know and believe in is often challenged throughout our lives. It is transformative learning theory that explains this learning process of constructing and appropriating new and revised interpretations of the meaning of an experience in the world. By the same token, Mezirow, Jack et al., (2000, p.8) purports that it "becomes important in adulthood that we develop a more critical worldview as we seek ways to better understand it. This involves learning how to negotiate and act upon our own purposes, values, feelings and meanings rather than those we have uncritically assimilated from others".

Fisher, Geller and Wasserman (2005, p.558) state that “transformative learning is based on the understanding of the self and the other, intrapersonal and interpersonal understanding of frames of reference, which are originally developed through beliefs, values and perspectives acquired in our family, culture and society”. In the process of “exploring their original frames of reference, people develop an understanding and appreciation of others’ frames of reference, which may differ from their own”. Fischer et al. (2005, p.558) further indicate that “the catalyst for transformative learning is the joining of self-reflection, critical thinking, praxis, empathy, dialogue and intercultural appreciation”. This catalytic experience could be anything from discussions or experiences that cause people to question their understanding and possibly change their frames of reference, whether in a personal, social or work setting.

As a workplace educator, there are times that I have to reflect and critically think of my role in the organisation, especially on those days when I am not given approval for learnerships due to business constraints. This sometimes causes me to question the organisation in terms of their willingness to address inequalities, and also to question myself in terms of having done enough, and often causes a change in my frame of reference. In this regard, I find Kmar, Ali, and Kumar (2013) useful, as they explain that some “researchers and practitioners in the field of transformative learning question whether it is possible to create transformative experiences in the workplace but that in some environments, procedures and processes have proven that they can nurture a transformative learning process. Making use of dialogue, feedback, role-playing and story-telling builds relationships and subtleties that foster changes in perspectives, as well as transformative experiences”. This has been my experience where in my job I make use of dialogue, feedback and role-playing, which has led changing of perspectives and transformative learning.

Taylor's (2007) literature reveals that many research studies report on cultivating transformative learning in higher education and "given this focus, more research is needed on fostering transformative learning, particularly in groups and in the workplace" (Choy, 2009, p.3). The workplace educator is thus a key role-player in workplace learning and the skill required to promote and support transformative learning within the organisation has been given much attention (Cranton, 2006). Within my role as a workplace educator, I often select learning programmes and training courses to implement within the organisation, and although these programmes need to meet certain set criteria, I also look at learning programmes and training courses that will redress inequalities and lead to positive change within the employee and the organisation.

Organisational development and transformation



For transformation to occur within the organisation, workplace educators must continuously reflect on their own assumptions and work ethics (Brookfield, 2000). In order to deliver and provide training and learning of a high quality that will suitably address the organisation's and the employees' needs, I have to ask questions, raise awareness, test propositions and always keep ethical conduct in mind. As mentioned previously, change is constant, and as a training and development practitioner, I have constantly to reflect on my work and the impact that I have made or am making within the organisation, but also in the lives of the employees. This reflection of my own work and impact resounds with Marsick and Watkins (2003, p.218), who in creating themes "about transformative action learning as it affects both personal and organisational transformation, recognise that there are constraints in place that work against these transformations, such as a strong organisational desire to maintain the status quo and on an individual level, resistance to change". This is still true today as it is the case that not all organisations are open to learning or transformation. This presents a challenge to employees

who are eager to learn within an organisation and such individuals often do not remain with the organisation for very long.

To counter this, there are retail organisations in South Africa that have learning programmes in order to retain employees who embrace learning, for example by including a work-back period if they take up learning within the organisation. At the other end of the spectrum, individuals exist who do not embrace learning in the workplace, whether formal or informal. While there may be various reasons for this, and the aim is not to declare it right or wrong, it does have an impact on learning as a whole. In focusing on workplace learning, Mezirow (1991) and others (Brookfield, 1986), Daloz (1986) “sees the need to find and create meaning within our lives as a key factor which motivates adults to participate in formal learning experiences” (Dirkx, 1998, p.5). Within the workplace, adults work and learn on a daily basis, but this learning is usually dependant on the receptiveness of the adult, the conditions of the workplace for facilitating adult learning and those facilitating the learning. By the same token, Marsick (1990, p.23) points out that, “... paradoxically, reflection is becoming more part of the lifeblood of organisations in today's turbulent economic environment ... and that managers are being called upon to make subjective judgments, take risks, and question the assumptions on which they have operated”. This is supported by Choy's (2009) deduction that transformative learning affirms the importance of reflection, by managers, employees and workplace educators, in the workplace.

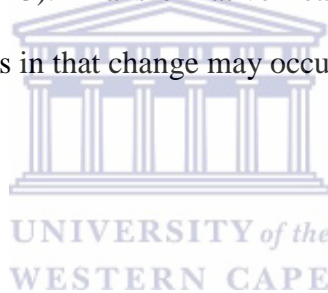
Being confronted and challenged by various personal and work-related issues in today's ever-changing environment, employees, like myself, are also compelled to reflect on their beliefs and ideas and adapt them accordingly, if needed. Pressure on today's workers in South Africa is increasing in response to issues such as skills shortages, racism and sexism. Psychologically, these kinds of challenges require employees to think and perhaps rethink their values, goals and

behaviours. As mentioned before, the use of dialogue, feedback, role-play and storytelling fosters relationships and dynamics that broaden perspectives and transformative experiences.

Workplace educators acting as learning coaches assess the participants and determine potentially transformative moments in which they guide the participants through critical reflection, causing them to surface their assumptions and evaluate their actions in light of fulfilling their intentions (Fischer et al., 2005, p.1). It becomes evident that people learn from one another in relationships. Mezirow (2003, p.63) reasons that the “trainer becomes a facilitator of reasoning in a learning situation and a cultural activist fostering the social, economic, and political conditions required for fuller, freer participation in critical reflection and discourse”. Similarly, workplace educators in South Africa also have to deal with diversity issues, motivating workers, employment equity issues on a daily basis, especially due to South Africa’s rich history and background. These are factors that may lead workplace educators to reflect on their own beliefs and understanding and may or may not change those beliefs accordingly. I have always believed that all people want to learn and will grasp any opportunity to do so, but when confronted by the opposite and not being able to motivate some employees to change their minds, I have had to confront the truth and change that belief.

Using diversity as an example, Henderson (2002, p.210) says that for most organisations it is a “major initiative that can be characterised as both transformative learning at the individual level and transformational change at the organisational level”. In this respect, Kegan (1994, p.232) points out that “when we address diversity simply through workplace training, we run the risk of reducing it to a required skill” and that only through transformational learning can a true change in perspective take place. A topic like diversity is often internalised by people and if, for example, a workplace educator has to facilitate learning on this topic, it leads to reflection and influences the facilitation.

Considering that most learning/training occurring in the workplace is based on improving productivity, research shows that learning which leads to transformation also has its place within the workplace and may, in fact lead to improved productivity. For example, in studying immigrant women garment workers in Canada learning ICT skills, Mirchandani, Ng, Sangha, Rawlings and Coloma-Moya, (2002) show that learning can be productive and transformative at the same time. Learning the ICT skills led to increased productivity but the workers' belief in themselves, and perception of their own abilities changed during the process of acquiring those skills. In the same way, Gallo's (2002) study of a "learner-centred workplace literacy programme, finds the programme 'transformative' for learners, and even workplace educators perceived themselves as change agents fostering critical, even transformative learning" (Fenwick, 2007, pp.317-318; p.325). Transformative learning is then applicable to both employees and workplace educators in that change may occur in both parties.



Summary

In reviewing the literature related to my research question, "How do workplace educator development programmes prepare workplace educators for their roles and responsibilities in facilitating learning in the workplace?" I firstly explored the different facets of the question: workplace learning, workplace educators, and transformative learning in the workplace. The literature shows that the workplace has become an important learning environment for employers and employees alike and that learning can happen both formally and informally. Literature also shows that the role of the workplace educator in facilitating learning is optimised if certain criteria are present for the workplace educator and the organisation.

Secondly, I explored some perspectives on transformative learning theory, as defined by Mezirow, hailed as the father of transformative learning, and many other researchers. These

concepts all have an impact on how transformative learning takes place within the workplace, and I hope to link my research with these also. As an aspect of my research, perspective transformation also comes to the fore as an important element in facilitating transformative learning in the workplace.



SECTION 3: RESEARCH DESIGN AND METHODOLOGY

Introduction

This study investigates how workplace educator development programmes prepare workplace educators for their roles and responsibilities in facilitating learning within the workplace. Given the social and political developments during the post-1994 period, the roles and responsibilities of the workplace educator in respect of facilitating learning in the workplace have become closely linked with transformation, be it personal in the way beliefs have changed, how those changes impact the organisation, as well as changes within a social setting. For this study, however, preparing workplace educators for roles and responsibilities in respect of facilitating transformative learning in the workplace is the focus, although I have questioned the personal transformation of the workplace educators as well as how the two impact each other. I do not discuss social transformation and this present a limitation. In this section I discuss my research design, the sample chosen and techniques employed for gathering data.

Research design

Gerring and McDermott (2007, p.1) classify “research designs and methods as ‘experimental’ or ‘observational,’ a dichotomy that has directed social science research for centuries but that excludes deliberation of experimental strategies in case study work. They argue that ... one gains purchase on the tasks of research design by integrating the criteria traditionally applied to experimental work to all research in the social sciences-including case study work. The concept of the case study is reserved for research that is observational, rather than experimental” (George & Bennett, 2005).

Silverman in Seale (2004, p.53) describes a methodology as “a general approach to study research topics and establishes how one will go about studying any phenomenon”. I reflected, both as an academic researcher and as a training and development practitioner in the South African retail industry, on the relationship between workplace educators, their qualifications and their preparedness to facilitate transformative learning in the workplace. Factors also considered were higher education qualifications and competencies held by workplace educators, as well as their roles and responsibilities within the organisation.

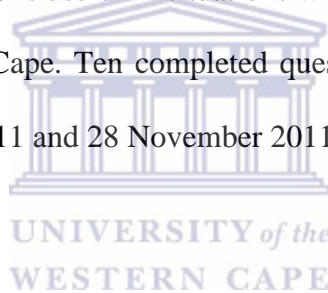
I take a qualitative approach to my research, described by Bryman (2008, p.366) as “interpretivist, meaning that, in contrast to the adoption of a natural scientific model in quantitative research, the stress is on the understanding of the social world through an examination of the interpretation of that world by its participants”. My investigation into the ways in which workplace educators perceive their roles within the organisation and the effects of qualifications, competencies, and their social and economic surroundings falls within this ‘social world’. Seale (2004, p.182) purports that a qualitative method allows access to attitudes and values of the participants and allows flexibility and exploration of suppressed views. This is what I aimed to receive from my participants.

Sampling

As a workplace trainer/educator within the South African wholesale and retail sector, I am part of a provincial forum of workplace trainer/educators from various retail companies within the sector for the Wholesale and Retail SETA (W&R SETA). The participants comprised a sample of the population of workplace educators in the South African retail industry. I emailed the questionnaire to thirty workplace educators from various organisations in this forum. Welman, Kruger and Mitchel (2005, p.52) define a population as “the study object and consists of

individuals, groups, organisations, human products and events, or the conditions to which they are exposed”. Correspondingly, Huysamen (1994, p.38) defines a “population as encompassing the total collections of all members, cases or elements about which the researcher wishes to draw conclusions”.

A sample, on the other hand, constitutes a subset of this population. This purposive sample was chosen because they are members of a retailers’ forum that have a very close working relationship with the W&R SETA and whose answers would be very valuable to this research. The choice was based on Foxcroft and Roodt (2002), who assert that purposive sampling is a type of non-random sampling in which participants are specifically sought out for the purposes of the research. This type of sample is useful in situations where a specific sample is needed, for example retailers in the Western Cape. Ten completed questionnaires, of the thirty sent, were returned between 18 November 2011 and 28 November 2011.



Research instrument

I developed a questionnaire as my research instrument to gather data in respect of my research question: “How do workplace educator development programmes prepare workplace educators for their roles and responsibilities in facilitating learning in the workplace?” I decided to use questionnaires as my initial sample of thirty participants included participants who were not all based locally and travel extensively. Questionnaires therefore allowed me to get information from them fairly easily. The questionnaire was divided into the following sections: biographical information, job details, qualification details, personal transformation, organisational transformation and enabling transformation. Personal transformation relates to changes that occurred within the participant’s own frames of reference. The changes that the participants affect within the organisation is investigated under the section called organisational

transformation and the how the participants facilitate transformative learning is labelled enabling transformation.

Data-gathering

I emailed the questionnaires to the participants as this was the most reliable option at the time, in terms of time constraints and access to participants. As the questionnaires were to be sent to 30 participants at various retail organisations in South Africa, emailing them was the easiest way to reach them. The fact that the questionnaire could be completed electronically and emailed in return also increased the chances of a higher return rate.

Mouton (1996, p.108) describes the following as being advantages of using questionnaires and surveys: “An efficient way of collecting information from a large number of participants; can be used to study attitudes, values, beliefs, and past behaviours; are standardised and therefore are relatively free from several types of errors, and are relatively easy to administer”. He goes on to list the following as disadvantages: “Being dependant on participants’ motivation, honesty, and ability to respond, response rates are usually low and the participants are usually self-selected”. Therefore a non-probability sample exists from which the characteristics of the sampled cannot be inferred. Even though I sent out questionnaires to thirty participants and only 10 were returned between 18 November 2011 and 28 November 2011. Although this is an acceptable sample size for the purposes of this study, I cannot make references to the population of workplace educators in the South African retail industry.

After I chose transformative learning theory to frame part of my research, I incorporated some aspects of transformative learning in the workplace, to design the questions for the questionnaire. I learnt from the literature that when certain dimensions are present within the

workplace and for the workplace educator, a conducive environment for transformative learning can be cultivated.

Data capturing

The data was collected when the completed questionnaires were returned via email and stored in my inbox. I saved electronic copies on my personal computer and had backups made. I also printed copies and filed them in a folder.

Data analysis

I analysed the data captured in the completed questionnaire. Denzin and Lincoln (2000, p.780) believe that the literature review and the researcher's own experience of the subject matter, are sources for themes. I analysed the data and made comparisons to establish similarities and differences. I also made inferences in terms of the literature. The analysis of my data enabled me to identify trends and patterns, to generate findings and make recommendations.

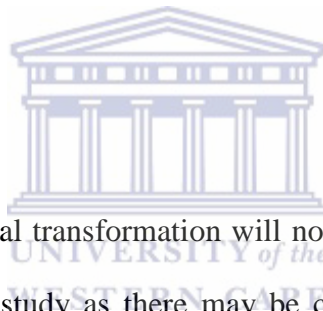
Ethical considerations

Diener and Crandall (1978, p.178-180) have dissected "discussions about ethical principles in social research, and perhaps more specifically transgressions of them, into four main areas that recur in different forms:

1. Whether there is harm to participants;
2. Whether there is a lack of informed consent;
3. Whether there is an invasion of privacy;
4. Whether deception is involved".

The main ethical issues in this investigation were consent and confidentiality. Participants consent to participate in my research was requested, as well as to confirm confidentiality. No personal information of the participants, contact details, biographical information, was revealed at any stage of the process. Appendix F refers to the consent forms compiled for all participants to inform them of the purpose of this research, while Appendix G is the letter confirming that their names and all personal information were not mentioned and that all other information was treated with the strictest confidence. To further secure anonymity, pseudonyms were given to the participants in the data analysis. Participation was not enforced and their willingness to participate in this research was affirmed upon signing the consent letter. Confidentiality was maintained.

Limitations to the study



For the purposes of this study social transformation will not be discussed at length and this, in itself, may be a limitation to the study as there may be certain variables that could make a significant difference or impact on this research. As I focused on a small specific part of the retail industry, and my participants were only those that form part of the Wholesale and Retail SETA Western Cape forum, the findings of this research cannot be generalised. At the time that the questionnaires were sent out, it was the busiest time of the year for retailers and this could account for the lower than anticipated response. Due to the busiest time of the year, it was also very difficult to make contact with the participants should further interviews have been required. The study relied on information on how the respondents' qualifications prepared them for their roles and responsibilities in facilitating transformative learning in the workplace, but not having the full curriculum of each qualification listed, also presented a limitation.

SECTION 4: DATA ANALYSIS

Introduction

After receiving the completed questionnaires, I identified trends and patterns that would assist in answering my research question: “How do workplace educator development programmes prepare educators for their roles and responsibilities in facilitating learning in the workplace?” The first part of this section describes the participants’ biographical data which is important as inferences are made to the history of South Africa, as well as their roles and responsibilities within the organisation, and competencies needed in these roles. Firstly, the roles, responsibilities and competencies were identified by means of a tick-list in the questionnaire. Secondly, by means of open-ended questions, I question if and how learning occurred and the impact thereof on the workplace educator, the organisation and the employee. As the literature review includes personal and organisational transformation, the data analysis includes both these aspects as part of transformative learning in the workplace and perspective transformation.

Workplace educators

Biographical data of workplace educators

Ten participants from various organisations in the retail industry completed the questionnaire.² Johan, Millie and Hester are white, aged forty to fifty, are all originally from outside the Western Cape and also have the longest years of service of the group. Ingrid, Louise and Suzanne are white females aged thirty to forty, while Caron and Jade are coloured females aged twenty to thirty. David, a coloured male, and Shelley, an Indian female, are also aged twenty to thirty. The three oldest participants grew up in the apartheid era and completed most of their

² To secure anonymity, participants have been given pseudonyms.

studies before 1994 and during 1994, just at the start of South Africa's democracy. Given the historical context of South Africa, the findings of this study become especially interesting, as the qualifications completed pre-1994 have a different impact than those completed post-1994, which will be discussed later in this section.

Roles and responsibilities of workplace educators

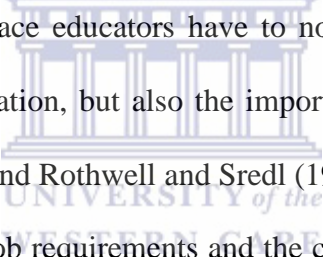
In my questionnaire, I asked participants to identify their job titles within their organisations. Caron, Shelley and Millie are employed as Training and Development Practitioners while Ingrid, Louise and Johan are employed as Training and Development Managers. David is employed as a Learning and Development Facilitator and Jade is employed as a specialist with the title of Leadership Development Manager. This reinforces Ketter's (2006) assertion that the traditional trainer now has more alternate job titles than ever.

The participants have described their positions and purpose thereof as follows: Hester, Ingrid, Suzanne, Caron and Louise see themselves as HRD practitioners, Johan and David see themselves as learning facilitators and Jade sees herself as a specialist in leadership development. Shelley and Millie, however, have chosen more than one description of their jobs. Shelley described herself as a learning facilitator, trainer and workplace educator, while Millie described herself as a learning facilitator, workplace educator and HRD practitioner. Louise sees the main purpose of her job as addressing specific business and skills needs. Similarly, Caron sees the main purpose of her job as enabling employees to develop and learn, thereby addressing business and skills needs.

Suzanne's main focus is:

“...growing and developing people. Bringing business goals and people needs in alignment” (November 2011).

David ensures that employees have the necessary skills to contribute to meeting business needs. As the main purpose of their jobs, Millie helps people grow and develop, Shelley enables people to expand skills and knowledge, and Johan enables employees to grow their knowledge and skills. Ingrid's main purpose is managing the training function. Hester sees the main purpose of her job as to create a talent pool, while Jade sees hers as transforming the culture of the company. This, and one of the reasons I used the specific options in the tick-list in the questionnaire, resonates with Brooks (2004), who emphasises that transformative learning provides a basis for developing people in such a way that a change in consciousness occurs, especially in challenging contexts, such as managing across national boundaries and learning to be part of a diverse workforce. The questions around diversity and equity also support this idea.

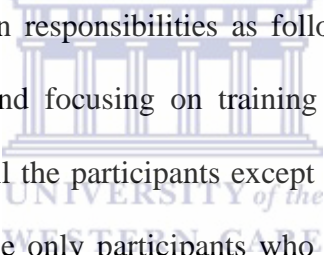


Daloz (1986) declares that workplace educators have to not only consider the importance of workplace learning for the organisation, but also the importance thereof for the employees. It also identifies with Lawrie (1990) and Rothwell and Sredl (1992) in that workplace learning aim to close the gap between existing job requirements and the competencies of the employee. This further resonates with Beattie (2006), Clarke (2005), Elkjaer (2004) and Smith (2003) who defines the purpose of workplace learning as ultimately achieving organisational goals. Again, the options listed in the questionnaire provide for achieving organisational goals, as discussed in the literature review.

The participants defined their main roles as follows: The role of trainer was identified as a main role and the role of skills development facilitator a secondary role for the participants. Caron, Ingrid and Johan have identified their role as assessor within the organisation, and Louise further identified her role as moderator. This resonates with Koorneeff, Oostvogel, and Poell (2005) who list training needs analysis, training program design and modification, planning and control, consultation and discussion and delivering and assessing training, as some roles of

workplace educators; and is further confirmed by Harris and Simons' (2000) deduction that the role of the workplace educator is now more comprehensive than in the past.

I also listed certain responsibilities in the questionnaire that, according to the literature as well as my experience as a training and development practitioner, are critical for the roles of workplace educators. These are: Plan and organise learning/training, foster a climate for learning, conducting training needs analysis, developing training material, facilitating learning/training, evaluating impact of learning, giving learner support and career advice, and quality assuring of material. Participants were required to choose the responsibilities that were most important in their jobs.



The participants defined their main responsibilities as follows: Hester and Suzanne focus on fostering a climate for learning and focusing on training needs, and quality assurance, for example, is not a responsibility. All the participants except Jade and Suzanne develop training material. Caron and Shelley are the only participants who quality assures material. Everyone except Hester and Millie evaluate the impact of training. Only Caron, Hester, David, Jade, Shelley and Suzanne provide learner support and career advice. As shown above, while facilitating learning is a part of most of the participants' responsibilities, it is clear that almost all of the participants' jobs encompass a wider range of training related responsibilities. The data is confirmed by Koorneeff, Oostvogel and Poell (2005) as well as Harris and Simons (2000) that have identified the responsibilities listed in the questionnaire, as critical to HRD.

Although participants see themselves responsible for more than just training, in the retail industry many retailers have specialist roles that mainly consist of one role, while other retailers may have workplace trainer/educators that perform more than one specialist role. The above-

mentioned data on the participants' roles and responsibilities in the organisation, confirm Brooks' (2004) assertion that the roles of workplace trainer/educators are important in growing and developing people in the organisation, promoting a learning culture and transforming the culture of the organisation by ensuring employees have the necessary skills and knowledge to align with business needs.

Competencies of workplace educators

Based on Harris and Simons' (2000) deduction that the workplace educator's role is not as basic as before, workplace educators now also require more specific competencies to fulfil their roles and responsibilities within the organisation. The competencies that I have included in my questionnaire include technical competencies, analytical competencies, leadership competencies, business competencies, interpersonal competencies, technological competencies and training specific competencies. All participants identified all the main competencies listed in the research instrument as important to their roles. However, they identified the following competencies as the most important according to their experiences within the organisations they work: interpersonal competencies, leadership competencies, business competencies and training specific competencies.

Interestingly, Johann said that business competencies are least important to his role as a workplace trainer/educator and Suzanne and Shelley declared that training related competencies are not as crucial to the role of a workplace trainer/educator. This is contrary to Erasmus, Loedolff and Hamman (2010, p.125) who stated that:

“It is well established that for HRD practitioners to be effective, they not only have to understand the business in which they render a service, but they should also be exposed to the basic business and management competencies to ensure the success of the business, for example, budgeting and financial management skills. ... The HRD

Practitioner is no longer only a trainer – but needs to be multi-skilled in a variety of competencies in order to play a meaningful role in the organisation”.

This supports David’s response that his qualification gave him a better understanding of the business functional areas. He said:

“HR principles can add value to those areas for business objectives to be met...”
(November 2011).

Suzanne further supports this statement when she said that her qualification:

“... has given me the insight to comprehend how best to address matters as both HR and business to ensure both benefit” (November 2011).

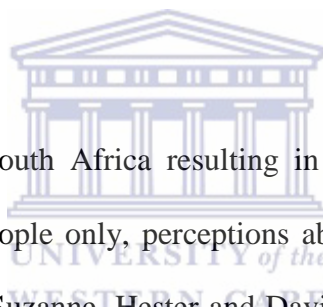
Qualifications of workplace educators

As my research question focused on workplace educator development programmes or simply put, qualifications attained by the participants, I was interested to know if there was a link between the competencies of workplace educators and these qualifications. Would their qualifications have developed the competencies necessary to fulfil their roles and responsibilities as workplace educators within the workplace? Would it make a significant difference where their qualifications were obtained? These questions were included in the questionnaire.

The data shows that all participants attained training-related qualifications at various higher education institutions. Jade, Hester, Louise and Johan completed masters degrees in Industrial Psychology from a university. Shelley completed a masters degree in Human Resource Management (HRM) from a university. Ingrid and Suzanne completed honours degrees in HRM from a university. David completed a B.Tech degree in HRM from a University of Technology

(former Technikon). Caron completed a B.Tech Degree in HRD from a university. Millie completed a Higher Certificate ODETD from a private provider.

It is therefore evident that all participants participated in a course or qualification related to workplace learning. This is supported by Olsen's (1994, p.67) North American Study that revealed that "most trainers' degrees were in education", but in contrast with Palmer's (1989) research where most trainers in the USA were selected because they had expert knowledge in a specific operational or technical field, but little or no expert knowledge in training. Similarly, Gauld and Miller's (2004) study on the Qualifications and Competencies of Effective Trainers found that a large number of participants did not indicate any formal qualification in teaching/training.



Due to the past inequalities in South Africa resulting in certain learning institutions being reserved for specific classes of people only, perceptions about which learning institutions are better still exist. Ingrid, Shelley, Suzanne, Hester and David agree that qualifications received from universities, as opposed to colleges or technikons, are regarded more highly than those received at other institutions. Suzanne supports this view in that:

"Universities provide the needed understanding of critical HR practices and place a heavy emphasis on being a change agent" (November 2011).

Hester agrees that:

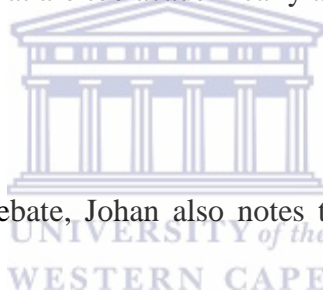
"In the long run the theoretical knowledge from the 'gurus' at universities stand the test of time. The theoretical foundation has remained with me over the years" (November 2011).

It is interesting to note that the older white participants favour university education above the other institutions, and that most of the younger participants have the opposite view. This may have something to do with South Africa's political history, but this cannot conclusively be stated. Caron, Louise, David and Johan are of the opinion that qualifications from Universities of Technology or former technikons carry more weight. David said that:

“... in my experience I found that technikon graduates enter the workplace with more to offer due to the practical approach” (November 2011).

Agreeing with David, Louise adds that:

“Technikons (Universities of Technology) provide more practical exposure per subject as opposed to universities that are too academically and theoretically driven” (November 2011).



While this may be an on-going debate, Johan also notes that wherever one completed one's tertiary education:

“The real learning of how to perform the roles and responsibilities only really happens afterwards in practice. The qualification is important as a foundation” (November 2011).

While agreeing that Universities of Technology are good for specific role preparation, Jade and Johan are convinced that in this competitive industry, university degrees are still perceived as carrying more weight. Jade says:

“The higher the qualification, the better” (November 2011).

Millie and Shelley also listed qualifications from private providers as adding value to their lives. These differing results above are supported by Ye (2000) in his argument that it is “still difficult to predict” the kinds of qualifications a workplace educator should attain.

Facilitating workplace learning

As all except one participant is involved in facilitating learning within the workplace, I questioned the impact of their qualifications on facilitating learning in the workplace. Hester regards transformation in the workplace as:

“... to help learners’ see what they need to change personally to either improve their interpersonal impression on others or their level of happiness ... training that includes self-assessment, self-reflection and self, awareness to assist learners’ development and growth” (November 2011).

This is supported by Marsick et al. (2003, p.218), who point out that “transformative learning is based in the contextual understanding of the self and the other, intrapersonal and interpersonal understanding of frames of reference”. In the process of exploring frames of reference, people develop an understanding and appreciation thereof. With regard to frames of reference, Shelley says that she is now able to:

“... explain to learners that the power to change stems from the individual and that each person has the capacity to influence their (own) circumstances ...” by “... using insights of different learner needs, requirements and motivators enable learning ...” (November 2011).

Johan asserts that: “Understanding motivational theories (help me know) what people will respond to in the interest of their own growth” (November 2011). David agrees in that he has: “... learnt to focus on individual needs that can add value to the business ...” (November 2011).

The above responses are supported by Mezirow's (1991) assertion that transformative adult educators focus more on helping learners become more creative, instinctive, critically reflective and rational through participation in critical discourse.

In the questionnaire, the following main roles and responsibilities were highlighted: Plan and organise learning/training; Foster a climate for learning; Conduct training needs analysis; Develop training material; Facilitate learning/training; Evaluate impact of learning; Give learner support and career advice; and Quality-assurance of material. The data provides evidence that these responsibilities and their corresponding roles are influenced by the participants' qualifications and experiences, which in turn has impacted the way in which they facilitate transformative learning within the workplace. Caron mentions a change in the way she facilitates training after completing her last qualification:

“I use coaching and mentoring sessions, culture improvement interventions, team-buildings and other organisational development interventions ...” (November 2011).

Johan comments that his qualification (even if it was obtained pre-1994), combined with years of experience, has helped him better facilitate:

“OD (organisational development) initiatives, e.g. team buildings that clearly illustrated the necessity of differences required in a team in the interest of team effectiveness rather than more of the same” (November 2011).

Fischer et al. (2005, p.1) supports this by stating that “facilitators acting as learning coaches assess the participants and determine potentially transformative moments”. Further evidence of transformative changes within the organisation is given by David, Millie and Hester. David declares that:

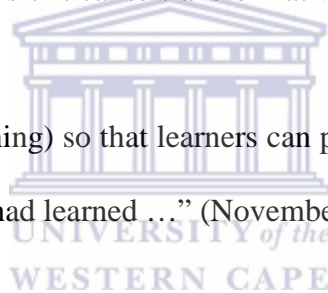
“... in change management interventions, I assist in creating awareness, a desire to participate ...” (November 2011).

This resonates with the theory of transformative learning as change management interventions, in my experience includes managing employee’s views and opinions when major events take place in an organisation that may affect employees’ frames of reference. Similar to my passion for promoting skills development amongst employees, Millie says that she now wants to:

“... encourage fellow employees to make use of the opportunities available to them ...”
(November 2011).

Using stories and dialogue, which is critical to transformative learning, Hester explains that she is trying to:

“... tell stories (during training) so that learners can perhaps also understand ... our role.
I tried to remember what I had learned ...” (November 2011).



Perspective Transformation

The before-mentioned methods, initiatives and interventions used by the participants, resonate with Mezirow’s (2000, pp.113-118) statement that:

“An implication for human resource development is that training programs need to include conditions that enhance the transformative learning process. These may include providing mentors for learners to help facilitate transformative thinking, opportunities for individual and cohort critical reflection, critical events that promote change in thinking and behaviour, and opportunities for learners to engage in joint and/or supported action or other mechanisms that support change over time. Training should also consistently include activities that promote critical thinking and reflection activities such as action learning, scenario building, and the use of metaphors”.

A change in frames of reference or in perspectives of the participants, also have an impact in the workplace. The participants' responses show a thread of being challenged by their personal beliefs, the way people learn, the impact they can have on other people within the organisation and the impact facilitating training can have on the organisation itself, amongst others. The thread identified resounds in Taylor's (1994, p.169) assertion that "a perspective change takes place in order to help adults make sense of these (challenges) and learn new ways to bring balance back into their lives".

My research was conceptualised, particularly by transformative learning theory and the literature suggests that transformative learning deals with a change in frames of reference or perspective. The data shows that changes in perspective took place within workplace educators, due in part to their experiences and qualifications. These changes also prepared them in their roles and responsibilities in facilitating transformative learning in the workplace. According to the participants, their qualifications contributed significantly to their personal transformation in a variety of ways. Mezirow (2000) refers to transformative learning theory as based on the belief that people want to make meaning of their daily lives ... and the data indeed lends itself to this.

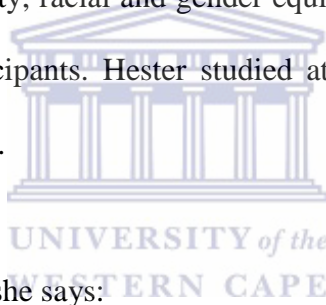
Johan, Millie and Hester, aged between 40-50 years, are white. This is significant in that their responses have a similar thread – growing up very conservatively in apartheid South Africa, certain beliefs about people and the way life should be were instilled. Interestingly, Johan and Hester obtained their qualification(s) before 1994, which in the South African context, has in fact made a significant impact in their responses to certain questions. In response to whether his qualification raised awareness of diversity, gender and racial equity, Johan says:

"No, not during the early 1980s!" (November 2011).

Millie proclaims that she:

“... grew up in an era where women were looked at as a secretary or office admin because you would eventually get married anyway ... I have been aware for a while that I grew up in supposed privileged arena ...” (November 2011).

Her awareness was only heightened during her studies after 1994. It has made her more aware of the diversity of the country, again how different people learn and add value to the business. As mentioned, pre-1994 qualifications did not cover the afore-mentioned topics and it makes sense seeing as at the time, diversity equity could not have been further from the minds of students that were segregated and classified. The majority of the qualifications attained after 1994 included subjects like diversity, racial and gender equity and has added immense value to the critical reflection of the participants. Hester studied at the University of Stellenbosch, a distance away from her home town.



During her undergraduate studies, she says:

“... sociology had the biggest impact on me, to show me a whole new picture around the difference between people and where difference groups behaviour and beliefs come from and to have a greater understanding for everyone’s situation in South Africa” (November 2011).

When returning home she found herself at odds with beliefs she was raised with. Her studies challenged her perceptions about people as well as her own values and beliefs. It is evident from the data that studying post-graduate qualifications after 1994 with topics relating to diversity amongst others, which was the dawn of democracy in South Africa, broadened the participants’ horizons and views on how different people are and how everyone has the ability to add value to each other as well as within the organisation. This resonates with Mezirow et al. (2000, p.8)

who state that transformative learning enables people to “negotiate and act upon our own purposes, values, feelings and meanings rather than those we have uncritically assimilated from others”.

With reference to diversity, sexual harassment, human rights and gender and racial equity, once again a distinction is made between pre- and post-1994 qualifications. While pre-1994 qualifications had very little or no information on these topics, interestingly Hester comments that:

“Coming from a conservative university prepared me to change my thinking about diverse groups and the workplace. I grew up very protected and knew very little about any fellow South African that did not look or talk like me” (November 2011).

Suzanne speaks of:

“... diversity, sexual harassment in the workplace, equity and human rights studies was specific subject matter of her qualification ...” (November 2011).

Interestingly, it is not only the white participants who had their frames of reference challenged.

David also affirms that:

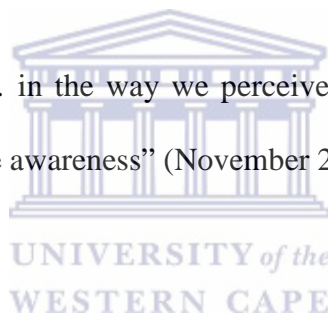
“The experience of studying with a diverse group of individuals alone raised awareness. I have learnt consider fair measures when it comes to employment or labour practices” (November 2011),

while Shelley claims that her qualifications:

“... led (her) to self-reflection and self-awareness, which is an inherent part of learning ...” (November 2011).

The above-mentioned responses resonate with Mezirow's (2000) description of how a "shift in how adults' see or experience things, is a direct consequence of transformative learning. He further unpacks this by describing the process of becoming critically aware of our own assumptions, prejudices and preconceived ideas and how they "have come to constrain the way we perceive, understand and feel about our world; of reformulating these assumptions to permit a more inclusive, discriminating, permeable and integrative perspective; and of making decisions or otherwise acting on these new understandings (Mezirow, 1991, p.14)". Topics like diversity, sexual harassment, gender and racial equity have not only had an impact on the participants' personal lives but also within the organisation. Louise declares that labour relations, labour law and industrial relations taught her about the legislative side to diversity and equity. She says that:

"... conflicts may arise ... in the way we perceive and treat each other. I have more legislative and consequence awareness" (November 2011).



Suzanne states that having:

"... diversity, gender and racial equity as subjects equip me to understand and discuss it with learners and diffuse situations that may arise from it" (November 2011).

Shelley agrees:

"Policies, guidelines and the law about human rights in the workplace were made clear.... Learning about different cultural dynamics has created a deeper understanding about the influences of learning in a South African climate" (November 2011).

Hester further identifies with this by saying that her degree gave her:

"... an understanding of people, and a tolerance for different types of people" (November 2011).

The topics of diversity and human rights are very emotional topics as they are usually formed by one's upbringing and values, and it is clear from the Suzanne, Shelley and Hester that their qualifications and subsequent experience within their organisations have changed or altered these perspectives. In the South African context, with the introduction of Skills Development and Employment Equity, certain interventions became critical within organisations. For example, as the previously disadvantaged population (during apartheid) were given more opportunities within the organisation, diversity management became crucial. David says that:

“I was taught to transfer knowledge (more) effectively, enabling me to deliver diversity, gender and racial equity-related info ...” (November 2011).

Johan announces that:

“... welcomes differences (diversity) amongst people rather than resist it” (November 2011).

This resonates with Henderson (2002, p.210), who says that “for most organisations, diversity is a major initiative that can be characterised as both transformative learning at the individual level and transformational change at the organisational level”. The data is supported by Mezirow et al. (2000, p.8) in stating that it becomes “imperative in adulthood that we develop a more critical worldview as we seek ways to better understand our world, learning how to negotiate and act upon our own purposes, values, feelings and meanings rather than those we have uncritically assimilated from others”.

Most of the participants have had changes in the way they think and act with regard to learning and different people, and have therefore also changed the way they facilitate transformative learning in the workplace. This resonates with Karalis (2010, p.17) who states that adults can change the way they see the world and therefore also, people in the world by “acquiring a critical awareness of their frames of reference, and questioning their assumptions”. Rational

discourse and critical reflection thus become key factors in perspective transformation. Although the data provides evidence of perspective transformation, strongly relating to people, diversity, the workplace and facilitating transformative learning in the workplace, I wonder if the transformation extends to the organisation in its totality.



SECTION 5: SUMMARY, FINDINGS, RECOMMENDATIONS AND CONCLUSION

Summary

My study addressed the research question: “How do workplace educator development programmes prepare workplace educators for their roles and responsibilities in facilitating learning in the workplace?” I fulfilled the aims of this research study: (1) to determine if the qualifications have transformed workplace educators’ perspectives; (2) how these qualifications prepared them to promote and facilitate learning within the workplace; and (3) if the qualifications prepared workplace educators to engage in transformative workplace learning. Being a workplace educator myself, this research study felt very close to my heart, as it has also had an impact on the ways that I facilitate learning within the organisation.

I discussed some history of education and learning in South Africa as a background to this study and explored the transformation of skills development in this country as context to the study. My conceptual framework was shaped by transformative learning theory and perspective transformation, which works well, considering the aforementioned change in South Africa’s socio-economic history. This study investigated the views and experiences of workplace educators within South African organisations, who have been impacted by the afore-mentioned changes and how, if at all, they have been transformed. The workplace educators that form part of my participants are my peers within the retail industry, who serve with me on a retailer’s forum.

I adopted a qualitative approach as I felt this was best suited for my study. My experience as a workplace educator has contributed to the successful execution of this research, as I have fairly easy access to other workplace educators and their experiences and opinions. This is also the

main reason that I developed a questionnaire to gather my data, and how I chose my participants. My questionnaire focussed on some of the following aspects: Workplace educators' specific jobs within workplace education, their roles and responsibilities related to workplace education, the competencies required to fulfil their roles and responsibilities, personal transformation and organisational transformation.

I gathered data by emailing a questionnaire to 30 workplace educators in the South African retail industry. I used email as this method is very reliable and allows for timeous completion and good return rates. Due to November being a very busy time of the year for the retail industry, I did not experience a high rate of response. Ten completed questionnaires were returned, and although this is an acceptable response rate for this study, it poses a limitation on making certain inferences for the whole population.

In analysing the data, I looked at the responses in the completed questionnaires and identified trends and patterns and various similarities as well as differences. The data enabled me to discern themes for understanding various aspects of my research question. I related these themes to discussions of transformative learning and perspective transformation in the literature. By making these links, I compiled certain findings, made recommendations and drew conclusions. While I have expanded my knowledge of facilitating transformative learning within the workplace, some unanswered questions that beg for further investigation, have emerged.

Findings

The following anticipated findings regarding workplace educator programmes were confirmed:

- (a) All participants participated in a course or qualification related to workplace learning, whether studying at a university or university of technology.

- (b) The majority of the participants prefer qualifications from universities and universities of technology. Participants felt that their university qualifications also provided a good theoretical framework, universities of technology provided a more practical approach and FET colleges and private providers prepared one for specific job roles.
- (c) University programmes are very theoretically based with not enough practical aspects or exposure. While this may seem like a possible weakness, industry still regards these qualifications in higher regard than those from other HE institutions.
- (d) The qualifications of workplace educators in the South African retail industry prepare them for their roles and responsibilities in facilitating learning in the workplace.
- (e) Workplace educators' perspectives were changed in one way or another by their qualifications.
- (f) The country's socio-economic changes have had an impact on qualifications during the post-1994 period. This factor opens itself up to some focus on transformative learning for the learners during the qualification, as well as the years following the qualification, when for many educators the theory was put into practice and in some cases, certain challenges were met and further changes in their frame of reference took place.

The following findings regarding workplace educator programmes were unexpected:

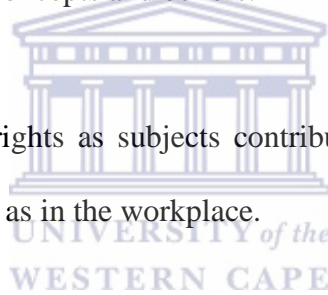
- (a) Post-1994 qualifications started including subjects such as diversity and equity, given the political climate at the time, and allowed for better understanding of people

within the organisation, the needs and motivations in order to add value to the organisation. It would be interesting to have had all the subjects listed so that one could better determine which subjects add the most and least value and why.

(b) Subjects that were specifically mentioned as adding value to the workplace educators' roles and responsibilities are training management, sociology, organisational behaviour and labour relations, and also contribute to transformation within the workplace.

(c) The educator development programmes enabled participants to change their perspective on various concepts and beliefs.

(d) Diversity and human rights as subjects contribute to social transformation, on an individual level as well as in the workplace.



The following findings regarding perspective transformation and transformative learning in the workplace were confirmed:

Perspective transformation

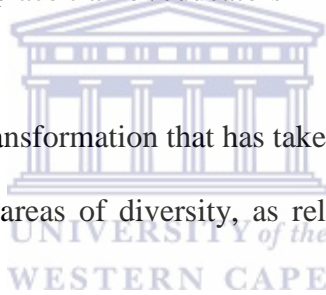
(a) Transformative learning can only be successful if facilitated by workplace educators who have experienced some form of perspective transformation themselves.

(b) Transformative learning, for most of the workplace educators, has not stopped as their beliefs are constantly being challenged within themselves, the organisation and the society. While beliefs and the status quo are being challenged, new information is continuously changing perspectives, confirming that perspective transformation

leads to transformative learning and perspective transformation. It also confirms that it is not only limited to one's personal life but is also shaped by particular developments in the society.

Personal transformation

- (a) Subjects such as diversity and equity have transformed some of the participants perceptions of different cultures.
- (b) Transformation in thinking and beliefs has led to transforming how the participants learn and in turn has transformed the way in which they fulfil their roles and responsibilities as workplace trainer/educators in facilitating learning.
- (c) Some of the personal transformation that has taken place among workplace educators has taken place in the areas of diversity, as related to South Africa's history and social transformation.



Organisational development and transformation

- (a) Subjects such as diversity and equity have transformed the way some participants regard the differences in gender, an example being the woman's role in the household and in the organisation.
- (b) Changes in the participants' themselves have influenced the organisation – be it in the way they perceive people or learning; there is evidence that transformation has occurred.

(c) Much of the perspective transformation that has taken place among workplace educators in the South African context has taken place in the areas of diversity within the workplace, as related to learning and social transformation.

(d) Due to South Africa's rich history, certain concepts and topics have become buzz words in the country and impact the organisation in very specific ways. Accepting and understanding these concepts, like employment equity, gender and racial inequality help workplace trainer/educators accept and understand that people are different, but that their differences add value to each other as well as within the organisation.

Recommendations



As I have already concluded that workplace educator development programmes prepare workplace educators in their roles and responsibilities to facilitate learning in the workplace, I make the following recommendations to further develop and improve the preparation of workplace educators:

Recommendations to higher education institutions

(a) Universities should consider including internships, community-service learning or experiential learning for graduates in specific fields. They could learn from universities of technology and only adopt those strategies that would align with their current strategies.

(b) Educator development programmes should be conceptualised in ways that prepare workplace educators to develop an understanding of the South African political-

economy and the role of workplace education and workplace educators in transforming the society through transformative learning.

(c) As educator development programmes have evolved in response to the socio-economic changes in the country, this should be maintained to keep them current and constantly keep workplace educators updated with concepts and strategies that contribute to the transformation and the success of the business. If the higher institutions accept my recommendations, it would be easier to also close the gap between the courses studied and the skills learned with the needs of the organisations.

(d) Higher education institutions and organisations should work closer together so that industry can share their needs in terms of what kind of workplace trainer/educators, with competencies specific to their organisations, they need, and HE can develop qualifications that will benefit industry as well as put the learners at an advantage within the organisation and South Africa. Considering South Africa's education system, further education and training (FET) providers could also be included.

Recommendations to organisations

(a) Employers should consider changing their perceptions of HE institutions and their respective qualifications and in so doing; break down certain stereotypes that may exist. A possible solution would be to partner with HE institutions to determine the subject, practical content and the potential graduates they could take in.

(b) Workplace educators should break down their own perceptions and biases in terms of people and their backgrounds, specifically their academic background. Experience

should also be considered. They should also try to play a more active role in convincing the strategic level of the organisation to consider all aspects of higher education and its importance in the organisation.

- (c) In terms of the research topic and the depth thereof, a quantitative study could be undertaken to corroborate the findings of the current research and to generate further insights. A larger, more representative sample could be drawn and a survey undertaken to determine if the competencies, qualifications, etc., listed as critical for success in this area could be confirmed. Comparisons could be drawn from existing statistics to determine the success of ETD interventions to enable and facilitate transformative learning.

- (d) Workplaces should implement programmes like diversity programmes that challenge the status quo and lead to transformation. They should also transform the organisation as whole relating to the topics that influence the country and the employees within. For example, if skills development or diversity is the factor transforming the country, organisations also have to transform accordingly.

- (e) The views of the recipients of training could be obtained in order for additional insights into their perceptions of the characteristics and competencies they identify as crucial for transformative learning. These could be compared to the results obtained from workplace trainer/educators as another possible study.

Conclusion

I embarked on this research to investigate how workplace educator development programmes prepare workplace educators for their roles and responsibilities in facilitating learning in the workplace. My research shows that the participants' workplace educator development programmes, in this case their qualifications, have prepared them to facilitate learning in the workplace.

A limitation of this study is that the sample was small in proportion to the workplace educators in South Africa. Should this research be replicated, a much larger sample should be used so that the findings can be extrapolated to the population. Another possible avenue for future research would be exploring the content of specific workplace educator programmes and the impact thereof within the organisation. In this case, the questionnaire would focus more specifically content and how it impacts workplace educators, employees and the organisation in its totality.

My research has shown that workplace educators' qualifications do prepare them for their roles and responsibilities in facilitating learning in the workplace. Insights were gained into how the participant's frames of reference and perspectives have changed through critical thinking and rational discourse. Another limitation exists in that the questionnaire did not allow for participants to elaborate on the specific perspective changes they experienced. Although the concept of perspective transformation was highlighted through this study, opportunity for further research does exist.

This research has expanded my knowledge of transformative learning and increased my awareness of facilitating transformative learning in the workplace.

SECTION 6: BIBLIOGRAPHY

Argyris, C. (1993). *Knowledge for action: A guide to overcoming barriers to organizational change*. San Francisco: Jossey-Bass.

Ashton, D., & Sung, J. (2002). *Supporting Workplace Learning for High Performance Working*. Geneva: International Labour Office.

Baldwin, T.T., Ford, J.K., & Blume, B.D. (2009). *Transfer of training 1988–2008: An updated review and new agenda for future research*. In G. P. Hodgkinson & J. K. Ford (Eds.), *International review of industrial and organizational psychology* (Vol. 24, pp. 41–70). Chichester: Wiley.

Barnett, R. (1999). *Learning to work and working to learn*. In Boud, D., & Garrick, J (Eds.), *Understanding learning at work*. (pp. 29-44). London: Routledge.

Beattie, R. (2006). Line managers and workplace learning: learning from the voluntary sector. *Human Resource Development International*, 9, 1, 99-119.

Billett, S. (2000). Guided learning at work. *Journal of Workplace Learning*, 12, 7, 272–295.

Boud, D., & Garrick, J. (1999). *Understanding Learning at Work*. London and New York: Routledge.

Boyd, R., & Myers, J. (1988). Transformative Education. *International Journal of Lifelong Education* 7, no. 4 (October–December 1988): 261–284.

Brookfield, S. (1986). *Understanding and Facilitating Adult Learning*. San Francisco: Jossey-Bass.

Brookfield, S. (2000). *The concept of critically reflective practice*. In A.L. Wilson and H. R. Hayes (Eds.), *Handbook of adult and continuing education*. San Francisco: Jossey-Bass.

Brooks, A. (2004). Transformational Learning Theory and Implications for Human Resource Development. *Advances in Developing Human Resources*, 211.

Bryman, A. (2008). *Social Research Methods*. New York: Oxford University Press.

Candy, P., & Matthews, J. (1998). *Fusing learning and work: changing conceptions of workplace learning*. In Boud, D (Ed), *Current issues and new agendas in workplace learning*. National Centre for Vocational Education Research, Adelaide.

Chen, A., Bian, M., & Hom, Y. (2005). Taiwan HRD Practitioner Competencies: An Application of the ASTD WLP Competency Model. *International Journal of Training and Development*. Oxford: Blackwell Publishing Ltd.

Choy, S. (2009). Transformational Learning in the Workplace. *Journal of Transformative Education*, Volume 7 Number 1, 2009, 65-84.

Clarke, N. (2005). Workplace Learning Environment and Its Relationship with Learning Outcomes in Healthcare Organizations. *Human Resource Development International*, 8, 185–205.

Cohen, J.B., & Piper, D. (2000). *Transformation in a residential adult learning community*. In Mezirow, J., & Associates (Eds.), *Learning as transformation: Critical perspectives on a theory in progress* (pp. 205-228). San Francisco: Jossey-Bass.

Collins, M. (1991). *Adult education as vocation: A critical role for the adult educator*. New York: Routledge.

Cranton, P. (1994). *Understanding and promoting transformative learning*. San Francisco: Jossey- Bass.



Cranton, P. (2006). *Understanding and promoting transformative learning (2nd Ed)*. San Francisco: Jossey-Bass.

Daloz, L. (1986). *Effective teaching and mentoring: Realizing the transformational power of adult learning experiences*. San Francisco: Jossey-Bass.

Daniels, R. (2007). *Skills shortages in South Africa*. Development Policy Research Unit DPRU Working Paper, University of Cape Town.

Denzin, N.K., & Lincoln, Y.S. (2000) Introduction: *The discipline and practice of qualitative research*. In Denzin, N. K., & Lincoln, Y. S. (Eds.), *Handbook of Qualitative Research (2nd Ed)*, London: Sage Publications.

Diener, E., & Crandall, R. (1978). *Ethics in Social and Behavioural Research*. Chicago: University of Chicago Press.

Dirkx, J.M. (1998). Transformative Learning Theory in the Practice of Adult Education: An Overview. *PAACE Journal of Lifelong Learning*, Vol. 7, 1-14.

DoL (Department of Labour). (2008). *Research consortium for artisan trades, scarce and critical skills project, March 2008*. Research commissioned by the Department of Labour, South Africa.

Elkjaer, B. (2004). Organizational Learning: The Third Way, *Management Learning*, 35(4), pp.419-434.



Ellinger, A.D. (2005). Contextual factors influencing informal learning in the workplace setting: The case of 'reinventing itself company.' *Human Resource Development Quarterly*, 16, 3.

Ellinger, A.D., & Bostrom, R.P. (2002). An examination of managers' beliefs about their roles as facilitators of learning. *Management Learning*, 33, 2, pp147–179.

Erasmus, B., Loedolff, V., & Hammann, F. (2010). *Competencies for Human Resource Development Practitioners*. 2010 EABR & ETLC Conference Proceedings Dublin, Ireland.

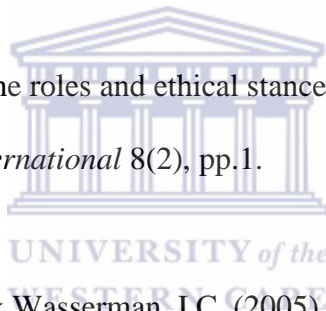
Eraut, M. (2000). Non-formal learning and tacit knowledge in professional work. *British Journal of Educational Psychology*, 70, 1, 113–136.

Eraut, M. (2002). *The interaction between qualifications and work-based learning*. In K. Evans, P., Hodkinson & L. Unwin (Eds.), *Working to learn, transforming learning in the workplace* (pp. 63-78). London: Kogan Page.

Eyler, J., & Giles, D. (1999). *Where's the Learning in Service-Learning?* San Francisco, CA: Jossey-Bass.

Fenwick, T.J. (2007). Tightrope walkers and solidarity sisters: critical workplace educators in the garment industry. *International Journal of Lifelong Education*, Vol.26, no.3, 315-328.

Fisher, C. (2005). HRD attitudes: the roles and ethical stances of human resource developers. *Human Resource Development International* 8(2), pp.1.



Fisher-Yoshida, B., Geller, K.D., & Wasserman, I.C. (2005). *Transformative learning in Human Resource Development: Successes in scholarly practitioner applications: Conflict management, discursive processes in diversity and leadership development*. Online Submission, Paper presented at the Academy of Human Resource Development International Conference (AHRD) (Estes Park, CO, Feb 24-27, 2005) pp. 558-565 (Symp. 24-2). 2005 8 pp. (ED492441).

Foxcroft, C., & Roodt, G. (2002). *An introduction to psychological assessment in the South African context*. Cape Town: Oxford University Press, Inc.

Franz, N. (2005). Transformative learning in intra-organization partnerships: Facilitating personal, joint, and organizational change. *Journal of Transformative Education*, 3(3).

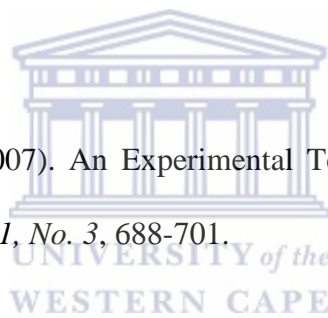
Freire, P. (1970) *Pedagogy of the Oppressed*. New York: Continuum Books.

Gallo, M.L., (2002), Picture this: immigrant workers use photography for communication and change. *Journal of Workplace Learning*, 14, 49-57.

Gauld, D., & Miller, P. (2004). The Qualifications and Competencies held by Effective Workplace Trainers. *Journal of European Industrial Training*, Vol. 28 No. 1, 2004, 8-22.

George, A., & Bennett, A. (2005). *Case Studies and Theory Development*. Cambridge, MA: MIT Press.

Gerring, J., & McDermott, R. (2007). An Experimental Template for Case Study. *American Journal of Political Science*, Vol. 51, No. 3, 688-701.



Groener, Z. (2006). *Adult Education and Social Transformation*. In Merriam, S.B., Courtenay, B.C., & Cervero, R.M. (Eds.), *Global Issues and Adult Education: Perspectives from Latin America, Southern Africa and the United States* (pp.5-14). San Francisco, CA: Jossey-Bass.

Hager, P. (1997). *Learning in the workplace*. Review of research. National Centre for Vocational Education Research, Adelaide.

Harris, R. and Simons, M. (2000). 'There are workplace trainers and then there are workplace trainers', *Australian Vocational Education and Training Research Association 2000 Conference*. 23-24 March.

Harris, R., Bone, J., & Simons, M. (1999). *Workplace Trainers: What do they do?* Centre for Research in Education, Equity and Work University of South Australia. AVETRA Conference Papers 1999.

Henderson, G. (2002). Transformative Learning as a Condition for Transformational Change in Organisations. *Human Resource Development Review* 2002. 186.

Hodkinson, P.M., & Hodkinson, H.D. (2004). *The complexities of workplace learning: problems and dangers in trying to measure attainment*. In H. Rainbird, A. Fuller & A. Munro (Eds.), *Workplace learning in context* (pp.259-275). Routledge.

Holliday, R., & Retallick, J. (1995). *Workplace learning: Module 2 – the workplace as a place of learning*. Open Learning Institute, Charles Sturt University, Wagga Wagga.

Hutchins, H.M., Burke, L.A., & Berthelsen, A.M. (2010). A missing link in the transfer problem? Examining how trainers learn about training transfer. *Human Resource Management*, 49(4), 599-618.

Huysamen, G.K. (1994). *Methodology for the social and behavioural sciences*. Southern: Halfway House.

Jacobs, R. L. (2003). *Structured on-the-job training: Unleashing employee expertise in the workplace*. San Francisco: Berrett-Koehler.

Jacobs, R.L., & Jones, M.J. (1995). *Structured on-the-job training: Unleashing employee expertise in the workplace*. San Francisco: Berrett-Koehler.

Karalis, T. (2010). Situated and transformative learning: exploring the potential of critical reflection to enhance organisational knowledge. *Development and Learning in Organisations*, vol. 24 no. 3, 8-10.

Kegan, R. (1994). *In over our heads: The mental demands of modern life*. Cambridge, MA: Harvard University Press.

Ketter, P. (2006). *CLO Path: Industry Experts Discuss Education, Profession, and Future*. American Society for Training and Development.

Kochanski, J.T. (1996), Introduction to Special Issue on Human Resource Competencies, *Human Resource Management*, 35 (1): 36.

Koorneeff, M. J. Oostvogel, K. B. C., & Poell, R. F. (2005). Between ideal and tradition: The roles of HRD practitioners in South Australian organisations. *Journal of European Industrial Training*, 29, 356-368.

Kmar, H.M., Ali, K.M., & Kumar, S. (2013). Learning Models for Human Resource Development in Higher Education Institution. *International Journal of Advanced Biological Research*, vol. 3(1) 2013: 123-127

Lawrie, J. (1990). Differentiate between training, education and development. *Personnel Journal*, 69, 10.

Leach, J. (1991). *Characteristics of Excellent Trainers in Business and Industry: A Psychological, Interpersonal, Motivational and Demographic Profile*. National Centre for Vocational Education. Berkeley, California.

Leach, J. A. (1992). *Private Sector Instructors: The Nature of Effective Vocational Educators Working in Business and Industry*. National Center for Research in Vocational Education. University of California, Berkeley.

Leach, J. (1996). Distinguishing Characteristics among Exemplary Trainers in Business and Industry. *Journal of Vocational and Technical Education, Volume 12, Number 2*.

Lee, Y. (2006). *An Investigation and Critique of Competencies needed by Human Resource Development (HRD) Master's Degree*. Florida State University: USA



Lee, T., Fuller, A., Ashton, D., Butler, P., Felstead, A., Unwin, L., & Walters, S. (2004). *Learning as Work: Teaching and Learning Processes in the Contemporary Work Organisation*. The Centre for Labour Market Studies. University of Leicester.

Lohman, M.C. (2005). A survey of factors influencing the engagement of two professional groups in informal workplace learning activities. *Human Resource Development Quarterly, 16*.

MacNeil, C. (2001). The supervisor as a facilitator of informal learning in work teams. *Journal of Workplace Learning, 13 (5/6)*, 246–253.

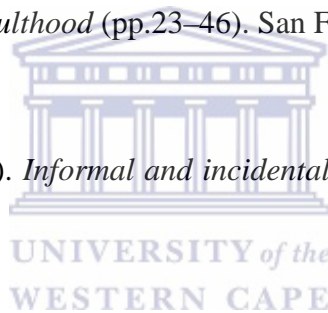
McLagan, P.A. (1989). *Models for HRD practice*. Alexandria, VA: American Society for Training and Development.

Marsick, V. I. (1987). *New paradigms for learning in the workplace*. In Marsick, V.I. (Ed.), *Learning in the workplace*. London: Croom Helm.

Marsick, V. (1988). *Enhancing staff development in diverse settings*. San Fransisco: Jossey-Bass.

Marsick, V.J. (1990). *Action Learning and Reflection in the Workplace*. In J. Mezirow (Ed.) *Fostering Critical Reflection in Adulthood* (pp.23–46). San Francisco: Jossey-Bass.

Marsick, V., & Watkins, K. (1990). *Informal and incidental learning workplace learning*. New York: Croom Helm.



Marsick, V., & Watkins, K. (2003). Demonstrating the Value of an Organization's Learning Culture: The Dimensions of the Learning Organization Questionnaire. *Advances in Developing Human Resources*, 5(2), 132.

Matthews, P. (1999). Workplace Learning: Developing a holistic model. *Journal of Workplace Learning*, Vol.6. No.1. 18-29.

McCullough, R.C. (1987). *Professional Development*. In R L Craig (Ed), *Training and Development Handbook* (3rd Ed). New York, USA: McGraw-Hill.

Merriam, S.B. (1998). *Case study research in education*. San Francisco: Jossey-Bass.

Merriam, S.B. (2001). *The new update on adult learning theory. New Directions for Adult and Continuing Education, No. 89*, San Francisco: Jossey-Bass Publishers.

Merriam, S.B., & Caffarella, R.S. (1999). *Learning in adulthood: A comprehensive guide. (2nd Ed.)*. San Francisco, CA: Jossey-Bass.

Merriam, S.B., Courtenay, B.C., & Cervero, R.M. (2006). *Global Issues and Adult Education: Perspectives from Latin America, Southern Africa and the United States*. San Francisco, CA: Jossey-Bass.

Mezirow, J. (1991). *Transformative Dimensions of Adult Learning*. San Francisco: Jossey-Bass.

Mezirow, J. (1996). Contemporary paradigms of learning. *Adult Education Quarterly*, 46(3), 158-173. Retrieved September 2, 2008, from the SAGE Social Science Collections.

Mezirow, J. (2000). *Learning as Transformation*. San Francisco: Jossey-Bass.

Mezirow, J. (2003). Transformative learning as discourse. *Journal of transformative learning*, 1(1), 58-63.

Mezirow, J., & Associates. (1990). *Fostering critical reflection in adulthood: A guide to transformative and emancipatory learning*. San Francisco: Jossey-Bass.



Mezirow, J., & Associates. (1991). *Fostering critical reflection in adulthood: A guide to transformative and emancipatory learning*. San Francisco: Jossey-Bass.

Mezirow, J., & Associates. (2000). *Learning as Transformation*. San Francisco: Jossey-Bass.

Mirchandani, K., Ng, R., Sangha, J., Rawlings, T., and Coloma-Moya, N., (2002). *Ambivalent learning: racialized barriers to computer access for immigrant contingent workers*. Working paper, NALL project, OISE/UT.

Morse, J. M. (1994). *Emerging from the data*. In J. M. Morse (Ed.) *Critical Issues in Qualitative Research Methods* (pp.23-43). Thousand Oaks, CA: Sage Publications.

Mouton, J. (1996). *Understanding social research*. Pretoria: Van Schaik.

National Board of Employment, Education and Training (NBEET). (1993). *Workplace Learning in the Professional Development of Teachers*, Commissioned Report, No. 24, Australian Government publishing service, Canberra.

Noe, RA. (2008). *Employee training and development*. New York: McGraw Hill.

Olson, S.J. (1994). Competencies of two-year college technical instructors and technical trainers: Similarities and differences. *Journal of Industrial Teacher Education*, 32(1), 65-85.

Palmer, T. (1989). *Developing University Training Programs to Meet Business Needs*, Proceedings of the HRD Professors Network Conference of the ASTD, pp 6-11, Washington, DC, USA.

Parke, J. (2004). *Transformational Learning and Human Resource Development: Advances toward a Knowledge Based Society through Humor*. Northern Illinois University.

Peerapornvitoon, M. (1999). *A survey of workplace learning and performance: competencies and roles for practitioners in Thailand*. Unpublished doctoral dissertation, the Pennsylvania State University, University Park.

Poell, R., Van der Krogt, F.J., Vermulst, A.A., Harris, R., & Simons, M. (2006). Roles of informal workplace trainers in different organizational contexts: Empirical evidence from Australian companies, *Human Resource Development Quarterly (USA)*, vol 17, no 2, 175-198.

Republic of South Africa (1998c) Skills Development Act No. 97 of 1998, Government Gazette No. 19420, Government Printers, Pretoria.



Rothwell, W., & Sredl, H. (1992). *The ASTD reference guide to professional human resource development roles and competencies*, (2nd Ed.) Amherst, MA: HRD Press.

Rothwell, W.J., Sanders, E.S., & Soper, J.G. (1999). *ASTD models for workplace learning and performance*. Alexandria, VA: American Society for Training and Development.

Sambrook, S. (2005). Factors influencing the context and process of work-related learning: Synthesizing findings from two research projects. *Human Resource Development International*, 8, 101-119.

Seale, C. (2004). *Researching Society and Culture*. London: Sage Publications.

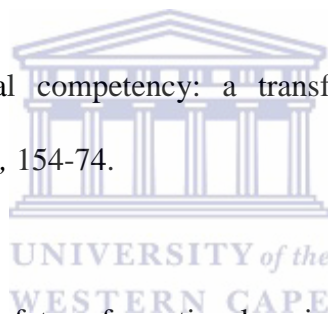
Senge, P. (1991). *The Fifth Discipline: The Art and Practice of the Learning Organization*. New York: Doubleday.

Smith, P. J. (2003). Workplace Learning and Flexible Delivery. *Review of Educational Research*, 73, 53–88.

South African Qualifications Authority (SAQA). 2000. *The NQF: An overview, a SAQA publication 2000*. Pretoria: Government Printer.

Streumer, J. (Ed.). (2006). *Work-related learning*. Dordrecht, Netherlands: Kluwer.

Taylor, E.W (1994). Intercultural competency: a transformative learning process. *Adult Education Quarterly*, Vol. 44 No. 3, 154-74.



Taylor, E.W. (2007). An update of transformative learning theory: A critical review of the empirical research (1999-2005) *International Journal of Lifelong Education*, 26, 173-191.

Taylor, E.W. (2008). Transformative learning theory. *New Directions for Adult & Continuing Education* (119), 5-15.

Ulrich, D. (2008). Dreams: Where human resource development is headed to deliver value. *Human Resource Development Quarterly*, 18(1), 1–8.

Ulrich, D., Brockbank, W., Johnson, D., Sandholtz, K. and Younger, J., (2008). *HR Competencies: Mastery at the Intersection of People and Business*, Virginia: Society For Human Resource Management.

Yoo, P.J. (1999). *Korean human resource development (HRD) practitioners' perceptions of expertise level and importance of workplace learning and performance (WLP) competencies*.

Unpublished doctoral dissertation, the Pennsylvania State University, University Park.

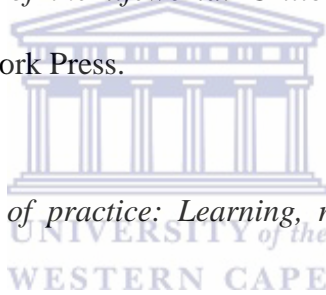
Watson, S., & Maxwell, G. (2007). HRD from a Functionalist Perspective: The Views of Line Managers. *Advances in Developing Human Resources*, Vol. 9, No. 1, 31-41.

Welman, C., Kruger, F., & Mitchell, B. (2005). *Research Methodology*. 3rd ed. Oxford: University Press.

Welton, M.R. (1995). *In defense of the lifeworld: Critical perspectives on adult learning*. Albany: State University of New York Press.

Wenger, E. (1998). *Communities of practice: Learning, meaning, and identity*. Cambridge: Cambridge University Press.

Wilson, A., & Hayes, E. (2000). *Handbook of adult and continuing education*. San Francisco: Jossey Bass.



SECTION 7: APPENDICES

APPENDIX A

The six competency groups and seven WLP roles of the WLP competency model	
Six competency groups:	Seven WLP roles:
Analytical	Manager
Technical	Analyst
Leadership	Intervention selector
Business	Intervention designer and developer
Interpersonal	Intervention implementor
Technological	Change leader
	Evaluator

Rothwell *et al.*, 1999; Yoo, 1999; Peerapornvitoon, 1999

WESTERN CAPE

APPENDIX B

Distinguishing characteristics of Exemplary Trainers

Competencies	Number of Trainers	
	Average	Exemplary
	n = 161	n = 228
Sets goals and objectives for training	17	22
Develops lesson plans	13	17
Keeps current and up to date	10	13
Conducts needs assessments	14	21
Provides advice to students	6	4
Designs instruction so it is easily understood	12	24
Provides positive reinforcement	14	14
Blends different training techniques	25	26
Uses questioning to involve participants	8	12
Facilitates group learning activities	7	16
Clearly explains concepts	7	13
Presents training in a logical sequence	8	10
Recognises and attends to individual differences	9	13
Explains complex ideas so they can be easily understood	4	10
Evaluates effects and impact of training	7	13

Leach (1991)

APPENDIX C

Main competency clusters required by HRD practitioners of South African-based business organisations – study conducted by Erasmus, Loedolff and Hammann (2010, p.39)

Business competencies

Personal and Interpersonal competencies

Intellectual competencies

Strategic HRD competencies

ETD-related legislation, strategies and policies

Research skills

Learning theories and principles

ETD needs analysis

Learning design and development

Delivery of training

Guidance and learner support

Skills Development Facilitation

Assessment and quality assurance

Evaluation of ETD

Occupational Development

Administration of Training



APPENDIX D

Qualifications held by Workplace Trainers

	University Teaching Qualifications e.g. Bachelor of Education	Other University Qualification (Social Science/Psychology or related Diploma/ Bachelor's Degree)	Master's Degree from a University	Accredited Vocational Training Qualification
No	n = 231	n = 259	n = 246	n = 219
Yes	n = 72	n = 44	n = 57	n = 84
Total	n = 303	n = 303	n = 303	n = 303

Source: Analysis of Survey Data



APPENDIX E

CONSENT FORM

To Whom It May Concern:

Simone Pedro has explained the research project and its purposes to me. I fully understand these and consent to my participation therein.

Participant's Signature:

Signed at:

Date:



APPENDIX F

LETTER TO PARTICIPANTS

10 November 2011

To Whom It May Concern:

RE: Request for Participation in Masters Degree Research

My name is Simone Pedro and I am a post-graduate student in the Intercontinental Masters Program at the University of the Western Cape. I am conducting a survey in partial fulfilment of the requirements for the Inter-Continental Masters Programme – Adult Learning and Global Change long paper (Local Option).



The research aims to determine: “How workplace educator development programmes prepare workplace educators for their roles and responsibilities in facilitating learning in the workplace? As a Workplace Educator in the South African Retail industry, you have been selected to participate in this research as a respondent. The survey involves answering general demographic questions and questions about your role as a Workplace Educator within the South African Retail industry. It should take about 20 minutes to complete. South Africa has a very unique history that has impacted the Higher Education system as well as the Skills Development platform. I would like to gain insight into your views and opinions as a workplace educator in the challenges they face within the workplace.

Your participation is completely voluntary, and your responses will be anonymous. Your personal information and email addresses will remain confidential.

Please complete the accompanying consent form and the questionnaire honestly and in full and return via email by Wednesday 16 November 2011.

If you have any questions, please contact me at 0829231506 or via email at simonep@pepstores.com.

Please keep this letter for your records. Thank you for your participation.

Kind regards,

Simone Pedro



APPENDIX G

RESEARCH INSTRUMENT - QUESTIONNAIRE

WORKPLACE LEARNING AND THE WORKPLACE EDUCATOR: A SOUTH AFRICAN

RETAIL STORY – THE QUESTIONNAIRE

Please answer the following questions **in detail** or choose the appropriate answer where required. Your honesty is greatly appreciated.

A. Biographical Information

1.	Name				
2.	Age	20 - 30	30 - 40	40 - 50	>50
3.	Gender	Male	Female		
4.	Race	White	Coloured	African	Indian

UNIVERSITY of the
WESTERN CAPE

B. Job Details

1. What is your job title? _____

2. Which of the following describes your role in the organisation best? Place a tick at the most suitable answer.

Trainer	
Learning Facilitator	
Workplace Educator	
Human Resource Development Practitioner	
Other	

If other, please specify _____

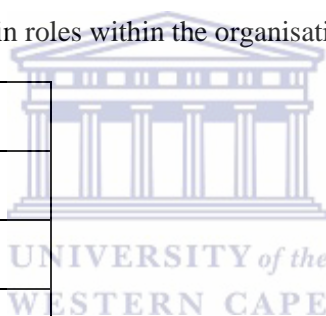
3. How long have you been in your current position? _____

4. Please choose from the list below your main responsibilities (Make a tick next to your choices):

Plan and organise learning/training	
Foster a climate for learning	
Conducting training needs analysis	
Developing training material	
Facilitating learning/training	
Evaluating impact of learning	
Giving learner support & career advice	
Quality Assuring of material	

5. Please choose from the list your main roles within the organisation (Make a tick next to your choices):

Assessor	
Moderator	
Trainer	
Skills Development Facilitator	
Quality Assurer	



6. In your opinion, which competencies listed below are the most important to your role? (Make a tick next to your choices)

Technical competencies	
Analytical competencies	
Leadership competencies	
Business competencies	
Interpersonal competencies	
Technological competencies	
Training related (ETD/Skills Development) competencies	

7. In your opinion, what is the importance of your role to the organisation?

8. What about your position inspires and motivates you?

D. Qualification

1. Do you have a training- or Human Resources-related qualification?

YES		NO	
-----	--	----	--

2. What kind of qualification do you hold? (Make a tick next to your choices):

Certificate	
Diploma	
Degree	
Post-graduate	
Other	



Please name the qualification:

3. When did you complete your qualification?

4. At which institution(s) did you obtain your qualification(s)?

5. In your opinion, which qualifications for your role hold more weight? Tick your choice and please explain

From Universities	
From Universities of Technology (Former Technikons)	
From FET Colleges	
From Private Providers	

6. What were the major subjects / main modules covered by your qualification?

7. What were the most important insights which you developed or learnt during the course of your qualification?

8. Briefly describe how your qualification has enabled you to perform your roles and responsibilities as per question B4 and B5?

E. Personal Transformation

1. How has your qualification enabled you to question your personal ideas/beliefs about learning and its power to transform you?

2. Did the qualification raise your awareness about the changing diversity in South Africa? If yes, in which ways?

3. Did the qualification raise your awareness about gender equity/inequality in your personal life? If yes, in which ways?

4. Did the qualification raise your awareness about racial equity/inequality in your personal life? If yes, in which ways?



F. Organisational Transformation

1. How has your qualification enabled you to understand the changing diversity of the organisation?

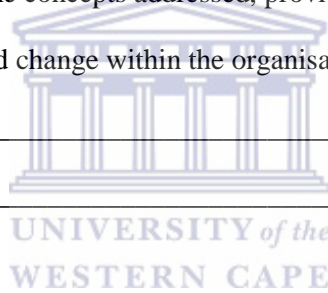
2. How has your qualification enabled you to understand sexual harassment in the workplace?

3. How has your qualification enabled you to understand human rights in the workplace?

4. How has your qualification enabled you to understand racial equity/inequality in the workplace?

5. How has your qualification enabled you to understand gender equity/inequality in the workplace?

6. With reference to this section and the concepts addressed, provide examples of how you have impacted the organisation or facilitated change within the organisation.



F. Enabling transformation

1. How has your qualification enabled you to facilitate learning that promotes learners' personal change?

2. How has your qualification enabled you to facilitate learning that enables learners to understand the changing diversity in the workplace?

3. How has your qualification enabled you to facilitate learning that enables learners to understand gender equity/inequality in the workplace?

4. How has your qualification enabled you to facilitate learning that enables learners to understand racial equity/inequality in the workplace?

5. How has your qualification enabled you to facilitate learning that enables learners to understand human rights in the workplace?



UNIVERSITY of the
WESTERN CAPE

THANK YOU FOR YOUR COOPERATION AND TIME!