

# Phantom ship or ferryboat? Understanding the mystery of learnerships and assessing the realities

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## Abstract

*More than 18 months after the launch of the National Learnership Programme, considerable mystification and ignorance still prevail in Faculties of Education at South African universities and technikons with regard to learnerships as a mode of delivering learning programmes. This article attempts to elucidate this confusion. From the evidence presented, it would appear that learnerships, as a mode of delivering a learning programme for the training of educators in South Africa, offer exciting, fresh and innovative possibilities to all stakeholders and role-players in education. The article furthermore indicates how the concept of a learnership for the training of educators may apply within faculties of education at universities or technikons and how these institutions may position themselves strategically so that they may also be able to offer learning programmes through, inter alia, the medium of learnerships. Although the principles underpinning the South African government's skills development efforts are mostly transparent, equitable and non-discriminatory, the implementation of the government's national equity and redress targets nevertheless seems to be burdened by a number of contentious dilemmas. Some attainable alternatives to these quandaries are suggested.*

## Rationale and purpose

The South African Minister of Labour officially launched the National Learnership Programme on 26 June 2001 in Johannesburg. At the time of writing, more than 18 months have passed and it has become increasingly evident that except for a handful of academics countrywide who have made it their personal mission to understand the concept of learnerships, the majority of academics in faculties of education at South African universities and technikons are still very confused and largely ignorant with regard to learnerships as a mode of delivering learning programmes.<sup>1</sup> This unfortunate state of affairs is encapsulated by the following quote:

You see, it is like the 'Flying Dutchman'. Every now and again, an academic mariner visits our shores with yet a grander story to tell about this phantom called a 'learnership'. Like everybody else, we would also desperately like to know whether it

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<sup>1</sup> During the latter half of 2001 and the first half of 2002, the author was invited to visit a total of eight universities and technikons in South Africa, where he addressed the academic members of staff in the faculties of education on the issue of learnerships as a possible mode of training educators. Data gathered during these visits suggest that the majority of all the academic members of staff in faculties of education at South African universities and technikons are still very much in the dark about learnerships.

is only a foggy innuendo of academic reality, or an affordable, safe and trustworthy ferryboat. If there is sufficient proof that it's the latter, I am sure most of us will gladly buy return tickets for a trip to the mainland.<sup>2</sup>

## Research questions

The research questions that this article investigates are as follows:

- What are the essential features of learnerships?
- Is a learnership model appropriate to the training of educators in South Africa?

This article was born of a genuine desire to help clarify the above-mentioned persistent, large-scale misconceptions regarding learnerships. In an attempt to illustrate its usefulness, this article also highlights the feasibility of learnerships as a possible mode of delivering a structured learning programme for the training of educators.

## Research methodology

To answer these questions, a relevant literature review was undertaken of both a number of primary and secondary sources. These sources are viewed as narratives, and the approach is seen as an alternative method of research to experimental methods. Secondly, a number of discourses (personal interviews, workshop handouts and proceedings, as well as minutes and personal notes of meetings) are analysed and summative and interpretative responses are given.

The article is structured in such a way that the major implications for the training of educators are pointed out after each essential feature of learnerships has been discussed.

## Outline of article

Starting with a brief overview of the historical position of learnerships within the broader context of (a) the discovery of gold and diamonds in South Africa in the nineteenth century, (b) historical discriminatory practices, (c) skill shortages and the Poor White Problem, (d) the decline in apprenticeships and (e) the so-called 'brain-drain', the article proceeds to define the concept learnership. It then draws attention to some of the main differences between learnerships and conventional apprenticeships, while subsequent paragraphs focus on the guiding principles, aims, objectives, roles and national targets of probably the two most important role-players in the South African learnership endeavour, namely the South African government (through the Department of Labour) and the Sector Education and Training Authorities (SETAs).

By identifying the pivotal processes that underpin the development of learnerships, the article attempts to elucidate how the concept of a learnership for the training of educators may apply within faculties of education at universities or technikons and how these institutions may position themselves strategically so that they may also be able to offer learning programmes through, *inter alia*, the medium of learnerships. (As far as could be ascertained, this has not been done before.)

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<sup>2</sup> Expressed by a colleague at a scheduled meeting of the Standards Generating Body (SGB) for Educators in Schooling. Faculty of Education. University of Port Elizabeth, 4 August 2001.

By referring to a case in point, a sub-theme of this scenario also reveals how conflict-ridden the fundamental issue of national (equity) targets with regard to the development and implementation of learnerships can be, especially regarding the funding of White learners in learnership programmes. Some attainable alternatives to this challenge are subsequently suggested.

## **The historical background to the development of learnerships in South Africa**

### **The impact of the discovery of gold and diamonds in South Africa**

Over the centuries skills have been passed on from master to apprentice, both by means of demonstration, as well as by means of structured experimentation and practice. This kind of 'transfer' constitutes a central thread of a cultural continuum over generations.

In the nineteenth century, the discovery of gold and diamonds by colonial powers created a new demand for skilled workers in South Africa (Department of Labour, 2001, CD-ROM). Artisans arrived from Britain with their skills, their history of trade unionism, and their labour traditions. The result was that local traditions were greatly ignored. In Europe, these relationships between learners and experts were structured through formal contracts of apprenticeships. The Mining Industry imported this tradition to South Africa<sup>3</sup> (Department of Labour, 2001, CD-ROM).

Mining also triggered the need for the training of professionals, such as engineers and geologists. New nursing, police and teacher training colleges were also established to cater for immigrants to this country. As was the case with apprentices, the training of professionals also involved theory and practice (Department of Labour, 2001, CD-ROM).

### **Historical favouritism**

First 'segregation' and then formal Apartheid prevented Black people from entering into apprenticeships and the professions. Until 1980 there was separate legislation governing Black and White artisan training. Africans (this was the term that was used at the time) were prohibited from signing up as apprentices and were denigrated to the status of tool 'boys' and – later – artisan aides. Only in 1981 were Black people allowed to enter apprenticeships (Department of Labour, 2001, CD-ROM).

### **Skill shortages and the 'Poor White Problem'**

At first, the apprenticeship system grew from strength to strength. During the 1920s and 1930s, the South African government (through the parastatals) used the apprenticeship system to address not only the skill shortages that had been experienced by the mines, but also the so-called Poor White Problem (Department of Labour, 2001, CD-ROM). Technical colleges were subsequently built to provide the theory component and, in many cases, were placed alongside the parastatals.

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<sup>3</sup> The first apprenticeship contract in South Africa was signed on 18 August 1857 between Arthur Charles Gardner, the employer, and a fifteen-year old wheelwright apprentice, Edward Henry James, whose monthly salary was fixed at R1-80 (Department of Labour, 2001, CD-ROM).

## The decline in apprenticeships

The number of learners in the available apprenticeships first rose (during the 1940s to the 1970s) and then fell (during the 1980s and early 1990s). There are many reasons for the decline, including the withdrawal of the tax incentive for employers in 1990 and the general economic recession in the country at the time. Two other important reasons were the relative decline in the mining and manufacturing industries and the growth of the service industries (Department of Labour, 2001, CD-ROM). Although more indirect, the increasing distance between the labour market demand, on the one hand, and the theory courses that were on offer at the time, on the other, further contributed to this decline.<sup>4</sup>

## 'Brain-drain'

While it is true that professional skills have not declined to the same extent, they nevertheless remain a problem, albeit a problem of a somewhat different nature. These skills are draining away through emigration because they are particularly valuable and, because of their internationally accepted academic 'currency', they are very much tradable in the global marketplace.

It is within the context of the historical overview outlined above that learnerships were conceived.<sup>5</sup>

Because the available evidence suggests that the nature of learnerships remains something of a 'phantom ship' to the majority of academics in faculties of education at South African universities or technikons, the following paragraphs will attempt to argue that instead, a learnership is an affordable, safe and trustworthy 'ferryboat'.

## The nature of learnerships

In the case of South Africa, learnerships may be viewed as new paraprofessional and vocational education and training programmes that stretch across the old artisan and professional divide. They combine both theory and practice, so that the learner is trained not only as to why things are done, but also as to how they are done (Department of Labour, 2001, CD-ROM). In most cases an employer (e.g. a provincial department of education or a school's governing body) will provide the practical part of the learnership, whilst an education and training provider (e.g. a university or technikon) will offer the learning part of the programme. A learnership, in essence

- is a work-based learning route to a qualification registered with the National Qualifications Framework (NQF);
- integrates education and training, as well as theory and work experience;
- contains a structured institutional learning and assessment component;
- contains a structured workplace learning and assessment component;
- must lead to a whole qualification on any of the eight NQF levels and should preferably terminate in such a whole qualification;
- covers all 25 economic sectors in South Africa (SAQA, 2001[a], printout of slideshow presentation).

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<sup>4</sup> A case in point is the *Engineering Employers Association's* recent criticism that the pattern-making trade theory was last updated in 1958 (Department of Labour, 2001, CD-ROM).

<sup>5</sup> It is generally agreed that the term 'learnership' is a neologism that was first coined in South Africa in the early 1980s.

A person who successfully completes a learnership will exit with a qualification that is registered with the National Qualifications Framework (NQF) and because such a qualification will signal the person's proven occupational competence, it will (at least) be recognised throughout South Africa.

From recent literature on the development and implementation of learnerships that was made available by SAQA and the ETDP SETA, it is clear that

- in a learnership programme the emphasis falls on its outcomes;
- a learnership combines both theory and practice;
- the learner is continually being assessed at various stages during the course of the learnership to monitor and moderate the learner's progress;
- learnership assessment practices have a predominantly practical element;
- learnerships will be planned and made available only in those occupations that employers and those involved in social development actually need;
- learnership programmes will be designed at different levels at the National Qualifications Framework (NQF) and will range from introductory to paraprofessional levels;
- a learnership will be a nationally recognised qualification (SAQA, 2001[a], printout of slideshow presentation).

Experience<sup>6</sup> has shown that one of the questions that is invariably asked most by academics is what the differences are between learnerships and the traditional apprenticeships.

### **The main differences between learnerships and traditional apprenticeships**

The five main differences between learnerships and conventional apprenticeships can be summarised as follows:

1. In a segregated labour market, the traditional apprenticeship system in South Africa was undoubtedly a tool for discrimination, since it provided for mainly White, male participation (Penxa, 2001, electronic version of original slideshow presentation). The new learnership system, although it relies heavily on the guaranteed commitment of all parties to certain minimum equity and redress targets, is to all intents and purposes non-discriminatory. Together with men, women and disabled people now have an equal chance of being accepted into any specific learnership programme.
2. Traditionally, apprenticeships were restricted to specific trades only and there was a clear link between apprenticeships and the former Apartheid government's principle of 'job reservation'. Learnerships, on the other hand, cover all 25 economic sectors in South Africa (SAQA, 2001[a], printout of slideshow presentation) and are not restricted to skills development in trade and industry only.<sup>7</sup>

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<sup>6</sup> Referring here to the author's visits to eight universities and technikons in South Africa during 2001 and 2002. Also see footnote 1.

<sup>7</sup> One example is the recently launched Level 6 Learnership for Educators in Schooling, which was developed as a joint venture between the Independent Schools Association of South Africa (ISASA) and the ETDP SETA.

3. Traditionally, apprenticeships in South Africa concentrated on the development of a narrow band of skills and, consequently, on an equally narrow and limiting qualifications pathway (Penxa, 2001, electronic version of original slideshow presentation). As stated earlier, learnerships are new paraprofessional and vocational education and training programmes that stretch across the old artisan and professional divide. As such, it is now possible in South Africa to offer a learnership towards any qualification and on any level of the National Qualifications Framework (NQF).
4. Conventional apprenticeships rely heavily on individual (and often ad hoc) agreements between selected places of work and training providers like technikons and technical colleges and little or no quality assurance of these apprenticeship programmes was ever done (Penxa, 2001, electronic version of original slideshow presentation). In the case of learnerships, there will – at all times – be at least a formal tripartite agreement in place between (a) the learner, (b) the employer (selected place of work) and (c) the relevant education and training provider (university or technikon). Quality assurance mechanisms will furthermore be rigorously employed at various stages during the learnership to monitor the process and to help ensure the successful completion of the learnership.
5. Traditionally, the apprenticeship system in South Africa served to accentuate the former government's under-investment in the country's human resources (Penxa, 2001, electronic version of original slideshow presentation). Learnerships, on the other hand, are specifically designed to aid the rapid development of and investment in South Africa's available human resources.

### **Implications for the training of educators**

From the above, it is clear that learnerships, as a mode of delivering a learning programme, may well be used to train educators in South Africa. The greatest advantage is that educators will continually gain valuable practical teaching experience under the watchful eye of officially appointed mentors, whilst studying towards a nationally recognised teaching qualification.

The fact that the learnership will be structured in such a way that it integrates education and training, as well as theory and workplace-based experience, will act in favour of educators, because they will be able to test their newly acquired knowledge and skills immediately within the familiar surroundings of their own (and other selected) schools and places of work. Capacity building and the empowerment of educators are advantages that can be expected ultimately to benefit the schools where these educators are employed.

### **The SA Government's mission statement and guiding principles for learnerships**

Since the learnership system represents only one out of a wide range of available modes of delivering a learning programme, it is important to appreciate why the South African government favours this particular mode of delivery. The following mission statement, which the South African government has recently adopted to encapsulate the goals of the National Skills Development Strategy (NSDS), neatly explicates the main reasons behind South Africa's learnership programmes strategy:

To equip South Africa with the skills to succeed in the global market and to offer opportunities to individuals and communities for self-advancement to enable them to play a productive role in society. (Minister of Labour, Mr MMS Mdladlana, at the occasion of the launch of the National Learnership Programme on 26<sup>th</sup> June 2001 in Johannesburg.)

To attain this end, the following six principles have been identified to guide the implementation of learnerships in South Africa:

- Lifelong learning
- Promotion of equity
- Driven by demand
- Flexibility and decentralisation
- Partnership and cooperation
- Efficiency and effectiveness (Department of Labour, 2001[b], 6).

### Implications for the training of educators

When the possibility of a learnership for the training of educators is weighed against these six principles, it is easy to note why it seems to make perfect sense to proceed without delay with such a project. Two possible stumbling blocks could be (a) to explain convincingly enough to all stakeholders that a justifiable demand for a learnership in educator training exists and (b) to reach agreement among stakeholders and role-players on the NQF level at which the proposed learnership qualification<sup>8</sup> should be instated.

## The main objectives that drive the National Skills Strategy

To implement the mission of the South African government that is stated above, the following five objectives were eventually identified to drive the National Skills Strategy (NSS). For each of these five objectives, the government has formulated one or more success indicators:

### To develop a culture of qualitative lifelong learning

#### *Success indicators:*

- By March 2005 70% of all workers will have at least a Level One qualification on the National Qualifications Framework (Department of Labour, 2001[b], 11).
- By March 2005 a minimum of 15% of workers will have embarked on a structured skills learning programme, of whom at least 50% will already have completed their programmes successfully (Department of Labour, 2001[b], 11).
- By March 2005 an average of 20 enterprises per sector (large, medium and small enterprises), and at least five national government departments will be committed to, or have achieved, an agreed national standard for enterprise-based people development (Department of Labour, 2001[b], 11).

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<sup>8</sup> See footnote 17.

## To foster skills development in the formal economy for productivity and employability

### *Success indicators:*

- By March 2005 75% of enterprises with more than 150 workers will be receiving skills development grants. The contributions towards productivity, and employer and employee benefits will be measured (Department of Labour, 2001[b], 13).
- By March 2005 at least 40% of enterprises employing between 50 and 150 workers will be receiving skills development grants. The contributions towards productivity, and employer and employee benefits will be measured (Department of Labour, 2001[b], 13).
- By March 2005 learnerships will be available to workers in every sector. (Precise targets will be agreed with each SETA.) (Department of Labour, 2001[b], 13).
- By March 2005 all government departments will assess and report on budgeted expenditure for skills development relevant to Public Service, Sector and Departmental priorities (Department of Labour, 2001[b], 13).

## To stimulate and support skills development in small businesses

### *Success indicator:*

- By March 2005 at least 20% of new and existing small registered businesses will be supported in skills development initiatives and the impact of such support will be measured (Department of Labour, 2001[b], 15).

## To promote skills development for employability and sustainable livelihoods through social development initiatives

### *Success indicators:*

- By March 2005 100% of the National Skills Fund apportionment to social development will be spent on viable development projects (Department of Labour, 2001[b], 17).
- By March 2005 the impact of the National Skills Fund will be measured by project type and duration, including details of placement rates, which shall be at least 70% (Department of Labour, 2001[b], 17).

## To assist new entrants into employment

### *Success indicators:*

- By March 2005 a minimum of 80 000 people under the age of 30 will have entered learnerships (Department of Labour, 2001[b], 19).
- By March 2005 a minimum of 50% of those who have completed their learnerships will be employed within six months of completion (e.g. they have procured a job or are self-employed), or they will be involved in full-time study or further training, or they will be involved in a social development programme (Department of Labour, 2001[b], 19).



Collectively, these five objectives and their success indicators provide the blueprint for the work of the Department of Labour and the various Sector Education and Training Authorities (SETAs) in South Africa. They also demarcate the uses of the National Skills Fund and the skills development levies. Furthermore, these objectives offer priorities around which Government, employers, trade unions and the wider community can unite their attempts at delineating the overall aims of learnerships, of which the eight quoted below are commonly acknowledged to be the most prominent.

## **Aims of learnerships**

There is broad consensus among stakeholders in South Africa that learnerships, especially in the wider South African context, should (at the very least) actively seek to

- reverse the decline of the apprenticeship system and reduce skills shortages in South Africa;
- extend apprenticeships from the 'dirty trades' into services and new industries, occupations and 'white collar' professions;
- cross the artisan and professional divide;
- adapt to the learning needs of the small and medium enterprises (SMEs);
- redress past discrimination;
- provide a flexible and responsive vehicle to translate labour market and skill shortages and opportunities into structured learning programmes;
- provide opportunities for workplaces to be sites of learning;
- support economic and employment growth and social development (Department of Labour, 2001, CD-ROM).

## **Implications for the training of educators**

From the five main objectives quoted in the previous paragraph it would seem that a learnership programme for the training of educators might have considerable relevance. Such a learnership programme will easily meet at least the following three objectives: (a) it seems sure to assist with the development of a culture of qualitative lifelong learning, (b) it will promote skills development for employability and sustainable livelihoods in the specialised field of education and (c) it may assist with the empowerment and capacity building of newly appointed educators. Regarding the eight aims that are quoted above, it is clear that such a learnership programme will (a) help to redress past discrimination by only admitting learners who meet the required equity criteria, (b) help provide a flexible and responsive vehicle to translate skill shortages and opportunities that may exist in teacher education into structured learning programmes, (c) provide opportunities for schools to become active sites of educator training and it will (d) help support economic and employment growth and social development in the country.

Once stakeholders and role-players understand where the concept of a learnership comes from historically, how it differs from the traditional apprenticeship system and what its guiding principles, objectives and main aims are, they more often than not start to show some actual interest. At this point, and probably also because of the frenetic competition for so-called 'fulltime equivalent students' between rival higher education institutions in South Africa, one of the most frequently asked questions by interested stakeholders and role-players concerns the rules that govern the official approval and registration of a particular learnership.

## Approval of learnerships

There is clear evidence of prevailing confusion<sup>9</sup> among certain stakeholders and role-players in the Education Training and Development field as to who exactly may approve, register and establish a learnership and under what conditions. (See also Phidane, 2002, personal communication.)

In an attempt to assuage this confusion, and for the purpose of this article, it should suffice to point out that Sector Education and Training Authorities (SETAs) – organisations made up of key labour market actors in every economic sector in the land – must approve all learnership programmes before they can be forwarded to the Department of Labour to be registered. The SETAs have been delegated this role because they are considered to be in the best position to assess if an intended learnership programme will meet an identified need and whether this need does, in fact, exist in an occupation where there are likely to be future jobs or self-employment opportunities (Department of Labour, 2001[f], 7).

Although they may not approve or register a learnership per se, it remains perfectly acceptable for any employer, group of employers, trade organisation, professional body, training provider or community group to design and develop a learnership in close liaison with the relevant SETA. However, to do so requires adherence to a number of essential activities and processes that are briefly alluded to in the next paragraph.

## The development of learnerships

Institutions (like universities or technikons) wishing to introduce a learnership for the training of educators, need to be aware of the intricate and closely scrutinised procedures that are required to do so. It is therefore necessary to point out that the successful development of a learnership relies greatly on the meticulous management and administration of each of the following pivotal processes, namely

- scanning the labour market to identify areas of skill shortages or opportunities;
- defining the exact occupation and skill areas to be covered by a particular learnership;
- developing skills profiles;
- identifying the outcomes of the programme and its different stages;
- liaising with the relevant Standards Generating Body (SGB) if there is one, or if not, forming one in association with the relevant National Standards Body at SAQA;
- working on unit standards and the ensuing whole qualification;
- developing learner support materials for the envisaged learnership programme;
- designing and testing assessment standards, materials and arrangements, as well as appropriate quality assurance mechanisms;
- establishing a close working relationship with the Learnership Support Service provided by the Department of Labour;
- securing agreement to the registration of the intended learnership and making sure that the provisions of the Skills Development Act and Learnership Regulations have been complied with (Department of Labour, 2001[d]).

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<sup>9</sup> Also see footnotes 1 and 6.

## Implications for the training of educators

From the above-mentioned processes, it seems quite possible to develop a learnership for the training of educators. With the possible exception of the first of these processes, it should be a relatively straightforward exercise to comply with the requirements that are implied in each of the other nine processes. Unless provincial departments of education, the ETDP SETA, providers (universities and technikons), educator unions and other stakeholders and role-players can be convinced of educators' existing skills shortages and the subsequent need for the training of educators, it will, however, be difficult to persuade the South African Department of Labour, via the ETDP SETA, to grant permission for the development of such a learnership.

From the storyline so far, it may seem as if the design, development, approval, registration and implementation of a learnership is a rather straightforward process. This is, unfortunately, not the case. Perhaps the most contentious characteristic of South Africa's learnership programmes strategy is the government's insistence on and commitment to meeting certain national targets.

## Government's commitment: National targets

The National Skills Development Strategy has set a target of 80 000 people below the age of 30 to be in officially registered learnerships by 2005 and the Human Resource Development Strategy has publicly stated on more than one occasion that at least 3000 learners must have commenced with their learnership education and training by March 2002<sup>10</sup> (Department of Labour, 2001[b], 22). It is obvious that it will require a sustained, committed, national effort to achieve these targets.

Central to the achievement of the above-mentioned targets is the pursuit of equity. The government (Department of Labour, 2001[b],10) has decided that the "following national targets are therefore adopted for the beneficiaries of learning programmes across the five objectives:

- 85 per cent to be Black
- 54 per cent to be female
- 4 per cent to be people with disabilities."

To successfully enforce these national targets has already proven to be surprisingly complicated, as the following example demonstrates:

The manner in which the Project Team of the Level 6 Learnership for Educators in Schooling (ETDP SETA, 2002(a), Chapter 2, 2) managed to deal with these equity requirements, was to negotiate and apply the following points system, which they subsequently used in 2001 as part of their strategy to screen potential applicants for admission into this learnership.<sup>11</sup>

Despite the points system in Table 1, the Project Team of the Level 6 Learnership for Educators in Schooling did not entirely succeed in recruiting sufficient numbers of Black learners. In the end, they had to obtain special permission from the ETDP SETA to allow a statistically significant number of White applicants to enrol for this learnership programme and – ultimately

<sup>10</sup> At the time of writing, it was not yet possible to ascertain whether this target for 2002 has been met or not.

<sup>11</sup> It needs to be understood that the example quoted above was devised to fit the requirements of a particular learnership and that a similar points system for the recruitment and selection of learners for any other learnership may very well differ in many respects (e.g. age and employment status) from this one.

– to be funded by the ETDP SETA. The ETDP SETA eventually granted this request – albeit reluctantly.

**Table 1: Points system used to screen applicants for admission into learnership**

<b>A: Equity, redress and employment</b>		<b>The learner is:</b>	
1. Race	Black (African)		20
	Black (Coloured or Indian)		15
2. Disabled	Disabled		30
3. Youth	Under 30 years of age. DOB > 1970		10
4. Prior employment status	Not employed at time of application		10
5. Nationality	A South African citizen or permanent resident		10
<b>SUBTOTAL</b>			<b>80</b>
<b>B: Key Skills and Areas of Need</b>		<b>The learner is:</b>	
6. Subject specialisation	Training to be a mathematics and / or science and / or technology and / or English (1 <sup>st</sup> Language) teacher		30
Language proficiency	Home language is a South African language other than English		10
<b>SUBTOTAL</b>			<b>40</b>
<b>TOTAL</b>			<b>120</b>

The records of the ETDP SETA (2002[b], handouts) reveal that of the 94 learners that were officially registered for this particular learnership towards the end of 2001, a total of 53 learners (56%) were White, whereas only 35 learners (37%) were Black. Only two (1,88%) of the learners were Coloured and five (4,7%) were Indian.

For a variety of reasons, this was truly a unique set of circumstances. One reason was the fact that the Level 6 Learnership for Educators in Schooling was, at the time, the very first learnership to be officially launched by the ETDP SETA and there were no precedents or historical resolutions in place to guide the ETDP SETA. As a result, a heated debate ensued when this particular anomaly was finally brought to a head at a scheduled meeting of the Board of the ETDP SETA that was held on Wednesday, 20 February 2002. To demonstrate how potentially volatile the fundamental issue of national (equity) targets with regard to the development and implementation of learnerships can be, it is necessary to refer to the following case.

During the Board meeting on 20 February 2002, one of the members,<sup>12</sup> representing the Employer (the Department of Education and its provincial chapters) in the Budget Chamber of the ETDP SETA, pleaded with the Board that any application received by the ETDP SETA from any institution in the country to have learnerships for White learners funded by the ETDP SETA "should never even be considered. No exceptions to the SETA's [equity – FJP] policy will ever again be allowed. This was the last time – the very last time." (Quoted verbatim<sup>13</sup>.) At this point another member remonstrated that if the national targets (see above) stipulate that 85% of the learners in any learnership programme must be Black, it should, nevertheless, be statistically possible for 15% White learners to enrol for the same learnership and to apply successfully to the ETDP SETA for funding. A member of the ETDP SETA then replied to this observation by saying: "Legally, the SETA cannot prevent them [White learners – FJP] from applying, but we may decide to reject their applications and refuse them funding" (Quoted

<sup>12</sup> The name is withheld.

<sup>13</sup> The author is also a member of the Board of the ETDP SETA and he was present at this Board meeting. What is reported in this paragraph is based on the notes that the author has made during this meeting, as well as on the draft minutes of the meeting that were later circulated to Board members.

verbatim.) The meeting then proceeded to pass a formal resolution that stipulates "that the principle of only funding learners in learnerships where the equity requirements were being achieved would be adopted" (ETDP SETA, 2002, 6. Resolution 6.4[g]).

### Implications for the training of educators

The significance of these equity targets is such that the successful development and implementation of any learnership for educators is bound to hinge on the recruitment of learners that will meet the above-mentioned equity and redress criteria. These criteria were set by the Department of Labour and are rigorously enforced by, *inter alia*, the ETDP SETA. The experience of the Level 6 Learnership for Educators in Schooling suggests, however, that meeting these equity and redress targets is complicated and requires, in practice, a certain degree of resourcefulness and administrative capacity.

The above-mentioned equity and redress targets suggest that it would be almost impossible for White, male educators to be accepted into any learnership that caters for the training of educators. White, female educators seem to have a slightly better chance than their male colleagues to be accepted into such a learnership programme at this particular juncture. Critical role-players, like some of the smaller educator unions with their predominantly White membership profile, will need to study this particular issue very carefully before advising their members to apply for admission to such a learnership. The same applies to White educators who may be employed at (predominantly) unicultural private schools like, for example, Greek, Jewish, Chinese and CVO<sup>14</sup> schools.

In the light of the above, White educators who wish to undergo educator training via the delivery mode of learnerships per se, may be compelled to consider other (more orthodox) alternatives. One possibility might be for their respective educator unions to take the initiative in organising private fund raising campaigns to allow educators to do workplace-based (i.e. 'school-based') training similar to that provided by SETA- and DoL<sup>15</sup>-recognised learnership programmes. Yet another possibility for this group of educators might be to negotiate bilateral agreements between their respective schools' governing bodies and service providers like universities or technikons, which will allow them to 'learn at work' by doing an 'internship' or 'traineeship', rather than a 'learnership'.

For it to be officially recognised, an accredited training provider like a university or technikon must offer the structured institutional learning and assessment component of any learnership. The next paragraph will look at how the concept of a learnership for the training of educators may apply within faculties of education at universities or technikons.

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<sup>14</sup> 'CVO' is an abbreviation for 'Christelik Volkseie Onderwys'. As such, CVO schools cater exclusively for White, Afrikaans-speaking learners who come from a strictly Christian, Calvinistic, Protestant and Reformed religious background.

<sup>15</sup> 'DoL' is a commonly used abbreviation for the South African Government's Department of Labour.

## **How the concept of a learnership for the training of educators applies within faculties of education at universities or technikons**

### **School-based programme**

A learnership is essentially a particular mode of delivering a learning programme and, as such, it can (and, indeed, should) survive alongside other, more conventional modes of delivery. Its most distinguishable feature though, is the fact that a learnership is primarily a workplace-based education and training programme and not, for example, a provider-based one.

It also differs from the more traditional in-service education and training programmes in that a learnership must lead to a coherent, fully integrated, whole qualification. It may not, for example, be a mere eclectic mixture of indifferently assembled unit standards or modules. In this regard it is assumed that any learnership for the training of educators will be school-based (where the school will then be regarded as the 'workplace').

### **Which SETA?**

Twenty-five SETAs have already been established and this number clearly confirms the panoramic scope and range of economic sectors that exist in South Africa today. Of all these SETAs, the Education, Training and Development Practitioners Sector Education and Training Authority (ETDP SETA) compares the most favourably with the nature of the work of educators. As such, the ETDP SETA also compares most favourably with the kind of educator training that faculties of education at universities or technikons may provide.

Any learnership for the training of educators should therefore be explored and implemented in close consultation with the ETDP SETA.

### **Learnership Regulations**

Faculties of education at universities or technikons may not, for example, unilaterally decide to institute a learnership for the training of educators. In terms of section 2 of the Regulations Concerning the Registration of Intended Learnerships and Learnership Agreements that were published in the Government Gazette (no. 22197) on 3 April 2001, only the ETDP SETA may apply to the Director-General of the Department of Labour to register such an intended learnership.

It is also true that faculties of education at universities or technikons may not unilaterally decide to register any learnership agreement, per se. In terms of section 3 of the same Regulations (see above), only the ETDP SETA may, for example, register a learnership agreement for the training of educators and then only if

- the Director-General of the Department of Labour has officially registered the intended learnership;
- a completed learnership agreement has been duly submitted to the SETA;
- all parties (learners, provincial departments of education and faculties of education) have duly signed the agreement;

- the employer party to the intended learnership (e.g. a provincial department of education or a school's governing body) falls within the scope of coverage of the ETDP SETA;
- the terms of the learnership agreement comply with the Skills Development Act as well as with any other relevant legislation;
- the learnership agreement was duly concluded before the inception of the learnership.

Section 5 of the Regulations stipulates that the ETDP SETA may, for example, only register a learnership agreement for the training of educators to which a group of training providers (e.g. two or three universities' faculties of education) is party, if

- one of the training providers is clearly identified in the agreement as the leading training provider;
- the leading training provider undertakes to comply with the training provider's duties in terms of the agreement.

Sections 6 to 8 of the Regulations stipulate that the ETDP SETA must decide within 30 days of receiving the learnership agreement whether or not to register this agreement and whether or not to pay a grant towards the cost of the learnership. The ETDP SETA must also advise the employer of the amount of any grant that it is willing to pay. Should it decide not to register a particular learnership agreement, it must notify all the parties to the agreement accordingly in writing, providing reasons for its decision.

### **Implications of the Learnership Regulations for stakeholders and role-players**

Should any critical role-player grouping decide to institute a learnership for the training of educators, it will need to establish an amicable relationship and liaise very closely with at least the following four stakeholder-categories: (a) the ETDP SETA, (b) the (future) employer (e.g. a provincial department of education or a school's governing body), (c) the educator unions and (d) the learner constituency that will benefit from the intended learnership for educators.

Interested critical role-players will be required to produce a substantial body of evidence to both the ETDP SETA and the (future) employer to prove why they wish to institute a learnership for the training of educators and why the intended qualification should not, for example, be offered via other, more conventional modes of programme delivery.

Critical role-players will also be required to advance compelling reasons to both the ETDP SETA and the employer as to why they are of the opinion that a justifiable demand for such a learnership programme does, in fact, exist.

### **Skills Development Regulations**

In terms of guidelines 3 and 4 of the Skills Development Regulations that were published on 22 June 2001, only employers who are up-to-date with the payment of their skills levies can claim skills grants from the ETDP SETA. Education and training providers may also seek grants from the ETDP SETA, provided that the grants will be used exclusively to sponsor projects and programmes that actively support the implementation of the ETDP SETA's sector skills plan.

In terms of sections 3 to 5 of the Skills Development Regulations, the ETDP SETA may determine and allocate discretionary grants to an employer if the employer has submitted an application for such a discretionary grant and also to education and training providers (e.g. faculties of education) if they have done the same. The ETDP SETA must likewise approve these discretionary grants before the proposed training programme for educators commences. In this regard, the ETDP SETA must prepare and distribute to employers and education and training providers (e.g. faculties of education) a schedule setting out the dates by which employers and education and training providers must submit their applications for these grants.

Guideline 24 of the Skills Development Regulations further stipulates that there are two possible types of grants to support learnerships, of which the first is a grant to offset the costs of implementing a learnership (e.g. off-the-job education and training provider fees). The second is a grant that may be paid to subsidise the learner's allowance if the learner was unemployed immediately before the start of the learnership. (In this regard it is necessary to understand that the ETDP SETA has the legal right to establish and announce its own criteria for approving learnership grants.)

### Implications of the Skills Development Regulations for faculties of education as service providers

Faculties of education at universities or technikons may apply for a grant from the ETDP SETA, provided that they can explain (to the satisfaction of the ETDP SETA) how the grant will be used to support the implementation of this SETA's sector skills plan through, for example, a learnership for the training of educators.

Faculties of education will need to liaise closely with both the ETDP SETA and the employer (e.g. a provincial department of education or a school's governing body) to ensure that they understand the circumstances and conditions under which the ETDP SETA may be persuaded to release grants towards the financing of a learnership for the training of educators.

The ETDP SETA will only pay the necessary grants to help sponsor a learnership for the training of educators once an employer (e.g. a provincial department of education or a school's governing body) can convincingly demonstrate how the intended learnership may assist in achieving that employer's own strategic skills development priorities for a particular financial year, how the learnership relates to the employer's Employment Equity Plan and how and to what extent the learnership will fit in with the ETDP SETA's sector skills plan. Faculties of education (as education and training providers) will therefore be pressured to make doubly sure that the intended learnership for the training of educators complies with both the employer's workplace skills plan and priorities, as well as with the SETA's sector skills plan.

In order to negotiate this veritable labyrinth of official regulations and stipulations safely, and in order to compete for the privilege of offering a learnership programme, it is necessary that faculties of education at universities or technikons know how to position themselves strategically.



## Strategic positioning of faculties of education at universities or technikons

### Schooling versus other sub-fields of NSB-05

For the education sector, the idea that a training programme for educators may be delivered by means of a learnership is a novel one and if education and training providers are serious in their efforts to cross the traditional education and training divide, learnerships for educators may yet prove to be both academically and professionally very rewarding.

The staff at the faculties of education at universities or technikons will do well if they understand that their responsibility is not only to provide properly qualified educators, school principals, directors, managers, etc. for the schooling sector alone, but that part of their scholarly commission in a new education dispensation should also be to broaden the service range of their faculties to include the design and delivery of learning programmes for Education Training and Development (ETD) practitioners in the other sub-fields of NSB-05, namely (a) Early Childhood Education, (b) Occupationally directed Education and Training and (c) Adult Basic Education and Training. The significantly positive contribution that a learnership for the training of educators can play in this regard should be vociferously advocated.

### Options open for faculties of education as service providers

In the light of the previous paragraphs, it is clear that faculties of education at universities or technikons will need to reach mutual agreement on at least the following three options:

- The option of competing with others in the field. Does a faculty aspire to compete with other education and training providers by campaigning to have similar learnerships registered (e.g. a NQF-Level 6 Learnership for the training of educators) with the ETDP SETA?
- The option of widening faculties' traditional focus to include other sub-fields of NSB-05. Does a faculty envisage applying to the ETDP SETA to have learnerships registered for educators in the schooling sub-field of NSB-05 alone, or should the option of developing similar learnerships for some (or all) of the other sub-fields also be pursued?
- The option of widening faculties' traditional focus to include not only other sub-fields of NSB-05, but also other NSB-fields. Does a faculty need to consider applying for the registration of a learnership similar to the ones suggested in the first two options mentioned above, while simultaneously examining the desirability and viability of developing other education oriented learnerships as well – irrespective of NSB-fields or sub-fields?

### Integration of critical cross-fields

In an attempt to offer strategic positions that may elevate and advance the competitiveness of faculties of education in the sphere of educator development institutions, the three questions mentioned above are sure to provoke interesting debates around the future niche that faculties should be occupying as far as the issue of learnerships is concerned. These debates will not, however, be complete without duly recognising the significance of the critical cross-fields that have been identified for the organising field of Education, Training and Development (ETD).

In South Africa there are concerns that are common to all educators, irrespective of the context or sector of education in which they are working (SAQA, 2001[b], 4). These concerns have been called cross-fields (not to be confused with critical cross-field outcomes) because they cut across all knowledge domains, as well as across the sub-fields within the ETD-sphere.

In the organising field of Education, Training and Development, the following five cross-fields were originally established by NSB-05:

- Democracy and Human Rights Education
- Environmental Education
- Enterprise and Economic Skills
- Life Skills (such as awareness of HIV/AIDS, sexuality and gender education, conflict resolution and safety)
- Education of learners with special educational needs and with barriers to learning and development.

An additional cross-field that has since emerged through work in the field is: Information and Communication Technologies (SAQA, 2001[b], 4).

Although the idea is that these cross-fields should receive due attention in an applied, integrated manner in every learning programme offered, they nevertheless present interesting opportunities as far as the design and implementation of learnerships for the training of educators are concerned.

### Which qualifications?

According to the Department of Labour, the acceptable norm is that most learnerships should not take more than one year to complete. This would suggest that a learnership qualification aimed at the training of educators should preferably not exceed 120 SAQA credits or take more than 1 200 notional hours to complete.

Neither in the relevant legislation though, nor in the Regulations, is there anything that prevents any employer (e.g. a provincial department of education or a school's governing body) or education and training provider to submit an application for a learnership (e.g. for the training of educators) that will take longer than one year to complete. A case in point is SADTU (South African Democratic Teachers Union) and the Department of Education's joint effort to register a learnership for the National Professional Diploma in Education (NPDE). This diploma is worth 240 SAQA credits and would normally take two years of full-time study or four years of part-time study to complete.

It therefore makes perfect sense to consider offering qualifications like the ACE (upgrading or retraining of educators) through a learnership. It would also make sense to consider offering the BEd (Hons) and some of the structured Master's degrees that are available for the training of educators through the delivery mode of learnerships.

In this regard, faculties should seriously consider inviting the active participation from both its local and its overseas partners in facilitating the implementation of such a learnership programme. Not only will it assist in elevating the academic and professional standard of the learnership qualification, but it will raise the reputation of faculties as respected global competitors in the field of education as well. The prospect of exposing both the students and the lecturing staff who are involved in such a learnership to international experience and expertise

by means of sponsored (and regular) student and staff exchange programmes, should also be enthusiastically explored.

One such programme that enjoys confirmed success abroad is an internship programme that is presently offered by the University of Sydney in Australia. This particular programme has been designed and developed for students who wish to enrol for the Master of Teaching (M Teach) degree and the University of Sydney<sup>16</sup> is doing this in close liaison with the New South Wales Teachers Federation.

Close scrutiny of the University of Sydney's internship programme reveals that it also fulfils many of the requirements of a learnership programme and that a similar programme can quite easily be tailored to cater for the training needs<sup>17</sup> of South African educators.

## Criteria for the selection of schools

Learnerships for educators will only succeed to the extent that schools (as workplaces) can be identified where they can learn and practice how to become better educators. Towards this end, it will be necessary for faculties to develop a set of criteria, in close liaison with the ETD/SETA, for the selection of schools as soon as possible. Possible issues that will need to be taken into account, include

- the availability of mentors / tutors;
- the training of mentors and assessors;
- the academic record of the school / of a particular department within a school;
- the school's capacity to employ an educator-in-training;
- the number of educators-in-training that the school can accommodate;
- the availability of hostel / other accommodation at or near the school;
- the geographical proximity of the school to the university or technikon;
- the capability of the university or technikon to visit the school / schools regularly (for instance the implementation of a concept such as Tsebo Koloing [Eng. 'Knowledge on Wheels'], which basically means a group of itinerant mentors – FJP).

Other issues, such as the question whether the school's ethos would, in fact, be conducive to a successful learnership for the training of educators, also need to be taken into account.

## In conclusion

This article endeavours to clear up the confusion and misconceptions that persist in Academia regarding learnerships as a mode of delivering a learning programme. It also highlights the strategic implications of learnerships as a mode of training educators in South Africa.

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<sup>16</sup> Those who would like more information on how the University of Sydney has managed to implement this particular internship programme, are encouraged to visit the following three Internet websites:

<http://alex.edfac.usyd.edu.au/home/prachome.htm>

<http://alex.edfac.usyd.edu.au/Practicum/practicum.htm>

[http://www.nswtf.org.au/future\\_teachers/intro.html](http://www.nswtf.org.au/future_teachers/intro.html)

<sup>17</sup> The debate whether such a learnership programme (or, alternatively, an internship programme) should be instated on, for example, a Master's degree level or lower, will depend on a variety of factors, such as (for example) the identified skills gaps of educators and the level of their existing academic and professional training at the point of admission into the programme.

A learnership is an innovative mode of delivering a learning programme. In order to make strategic use of this mode of delivery, educators, educator unions and faculties of education at universities and technikons need to recognise where the notion of learnerships comes from historically. They also need to understand how a learnership may best be implemented in close liaison with the ETDP SETA and other role-players. Within the context of educator training and development, such understanding will help to advance and elevate the competitiveness of these higher education institutions both locally and internationally.

From the evidence presented, it is clear that learnerships, as a mode of delivering a learning programme for the training of educators in South Africa, is not a foggy innuendo of academic reality. Instead, it appears to be an affordable, safe and trustworthy ferryboat, because it offers exciting, fresh and innovative possibilities to all stakeholders and role-players in education. For Black and historically disadvantaged educators – especially those who are employed at schools in the so-called 'deep rural areas' – the prospect of furthering their academic and professional qualifications through a relevant learnership is particularly promising and should be enthusiastically explored and supported.

As this article also attempts to indicate, the flipside of the learnership issue is burdened by a number of contentious dilemmas. Not only does the design, development, registration and eventual implementation of learnerships depend on the careful, conscientious navigation of a maze of relevant regulations and stipulations, but this process is also bound to be extremely time-consuming. The principles underpinning the South African Government's skills development efforts are undoubtedly transparent, equitable and non-discriminatory. The fact remains, however, that the implementation of the government's national equity and redress targets is essentially reflecting an assumed policy of reverse discrimination, since White learners who may apply for admission to learnership programmes will not necessarily be funded by the responsible SETA.

White educators who might be interested in a learnership-type qualification may, therefore, not only have to find their own sources of funding, but may also have to negotiate (for example via their own educator unions and / or school governing bodies) their own agreements with education and training providers like universities and technikons. This kind of reverse discrimination and deliberate exclusion of White learners from registered learnership programmes may thwart the government's attempts at national reconciliation at a time when the country can least afford it.

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