

# **LEARNING UNIT 3 - Learner Support**

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## Learner Guide

## Learning Map

This Learning Unit contains 2 Modules and are set out here as follows:

Module Name	Module Outcomes
<b>Module 1 - Managing Barriers to Learning</b>	<ul style="list-style-type: none"> <li>✓ Define own role, as an ETD practitioner, in learner support.</li> <li>✓ Recognise learners who have special needs.</li> <li>✓ Discuss with learner the need for further intervention.</li> <li>✓ Refer learner for further intervention.</li> </ul>
<b>Module 2 - Guide and Support Learners</b>	<ul style="list-style-type: none"> <li>✓ Diagnose and make recommendations concerning learner problems in relation to learning and assessment</li> <li>✓ Identify and analyse learner needs;</li> <li>✓ Counsel learners concerning problems in relation to learning and assessment;</li> <li>✓ Advise learners concerning their learning and development</li> <li>✓ Prepare and review an individual development plan;</li> <li>✓ Provide guidance to learners;</li> <li>✓ Maintain records of learner issues, records and guidance provided</li> <li>✓ Evaluate services provided.</li> </ul>

## Navigating the Learner Guide

### Use of Icons

Throughout the learning programme icons are used to focus your attention on important aspects of the learning programme. The following icons are used in this learning programme to direct your attention in using it as a reference guide.



#### Group Activity / Pair Activity:

You will be required to complete an activity in your group or in pairs with fellow colleagues / programme participants, and provide feedback to the participants in a report back or presentation session.



#### Individual Activity:

You will be required to complete an activity on your own that relates to the outcomes covered in the module.



#### Portfolio Activity:

Complete the assessment activity that will be assessed as part of your Portfolio of Evidence for the particular module.



#### Self Reflection:

Reflect on the question(s) asked to identify the relevance of learning outcomes in your own working environment.



#### Learner Tip:

A useful tip or essential element regarding the concept under discussion is given as a basis to further discussion.



#### Resources:

Possible sources for further research and study is listed under this icon. Resources may include additional reading, handouts, web-sites, multimedia



#### Facilitators Note:

Content matter that is critical to the understanding of the module. The learner must pay careful attention to this section.

**Mentored Discussion:**

Refer to your Mentor or Workplace Supervisor to assist in this activity, as they will conduct the assessment or sign off of the activity once completed.

**Learning Outcomes:**

Please refer to the beginning of each module for the learning outcomes that will be covered per module.

**Self Assessment:**

You have come to the end of this module – please take the time to review what you have learnt to date, and conduct a self assessment against the learning outcomes of this module

## Contents

ETD Practitioners Role in Learner Support (SO1).....	10
Activity 1: (SO 1 – AC1) .....	12
Activity 2: (SO 1 – AC2,3) .....	12
Activity 3: (SO 1 – AC4) .....	12
Learners with Special Needs (SO 2) .....	13
Diagnosing Learning Difficulties.....	13
Example of a Simple Eye Test (SO2 -AC3) .....	18
Activity 4: (SO 2 – AC1,2,4) .....	22
Working Learning Disabilities (SO3/4) .....	23
Activity 5: (SO 2 – AC 5).....	24
Promoting Learner Participation in the Process .....	25
Treatment and Intervention .....	26
Referring the Learner (SO5).....	28
Investigate and Respond to Absenteeism and Drop-out. (SO6).....	30
Activity 6: (SO 6).....	31
Self Assessment .....	32
Portfolio Activity: .....	32
Learner Needs Analysis (SO1) .....	34
Activity 7: (SO1).....	38
Reviewing Learner Needs (SO2).....	38
Learning Contracts .....	39
The Structure of Different Programmes .....	40
Learning Programme Content.....	41
Activity 8: (SO2).....	42
Sources of Information .....	42
Corporate Multiversity.....	42
Information that is relevant and sufficient.....	44
Learnership and Skills Programmes.....	47
Corporate Library .....	48
Maintaining and Managing Resources.....	48
Information Management System.....	49

Individual Development Plans .....	50
Activity 9: (SO2).....	64
Guide Support and Advice (SO3).....	64
The Suitability of the Support and Assistance .....	64
Appropriate Support Services .....	64
The needs of large diverse groups of learners.....	65
Mentoring as an important support service .....	65
Counseling.....	66
Interpersonal Relationships in Counseling .....	67
Focus on your Learner .....	70
Body Language .....	70
Principles of effective feedback.....	71
Activity 10: (SO3).....	71
Impact of Values and Attitudes.....	72
Self-Awareness of Personal Values, Believes, Attitudes and Fears .....	74
Questions to raise self-awareness .....	75
Activity 11: (SO3).....	76
Maintain Records of Assistance and Support (SO4) .....	77
Maintaining Confidentiality .....	77
Activity 12: (SO3).....	78
Evaluate and Review Support Services (SO5) .....	78
Relevant Focus .....	78
Strengths and Weaknesses .....	78
Opportunities and Threats.....	79
Order of Importance .....	79
Action Plan .....	79
Compiling a Report on Findings .....	82
Report Outline.....	82
Feedback .....	83
Activity 13: (SO5).....	83
Self Assessment .....	84
Portfolio Activity: .....	84



## Resources

### Compulsory Books:

Book Title	Author	ISBN Number
ETD Practices in South Africa	M Meyer, J Mabaso, K Lancaster	ISBN 0409041459
Occupational directed ETD practices	Marius Meyer, <u>Mark Orpen</u>	ISBN 9780409023848
Practicing education, training and development in SA organisations	<u>Kiru Truman</u> ; <u>Jo-Anne Botha</u> ; Jerome Kiley	ISBN 9780702176944

# Module 1 - Manage Barriers to Learning

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## Learning Outcomes:

The following learning outcomes are covered in this module.

- Define own role, as an ETD practitioner, in learner support.
- Recognise learners who have special needs.
- Discuss with learner the need for further intervention.
- Refer learner for further intervention.
- Investigate and respond to absenteeism and drop-out.

A learning support system can be identified as the systematic utilization of all devices and techniques that ETD Practitioners can use to support learners. All learners need support, irrespective of what they are learning.

Support and guidance for learners themselves can come from employers, providers, educational institutions and other agencies. Employers and providers should have a policy or strategy for guidance and support, backed up by a set of procedures.

There is a direct relationship between the quality of support given to learners and retention. Where barriers are identified and action is taken quickly, learners are more likely to stay. Over forty percent of learners who leave work-based learning programmes early cite personal and work-related problems as the main reasons for leaving. Clearly, providing more effective support would help to reduce the number of early leavers.

Some employers and providers have already made the link and started to design guidance and support strategies specifically aimed at improving retention.

There are many reasons why learners don't get on well with their learning and don't achieve their goals. It's important to understand what the barriers are in each individual case. Generally speaking, they fall into two main categories:

- progress with learning – e.g. planning learning, keeping up with the standards expected, balancing the demands of learning and work
- personal difficulties – e.g. financial, accommodation, relationships, care responsibilities, health.

Supporting learners effectively means being aware of their background, circumstances and personal problems.

## ETD Practitioners Role in Learner Support (SO1)

Building good relationship is at the heart of providing good guidance and support to learners as this needs to be optimised to facilitate the learning process. The better ETD Practitioners get to know their learners, the more likely they are to provide the support learners need, when they need it.

ETD Practitioners need particular skills such as:

- understanding learner behaviors
- interpreting learner behaviors correctly
- to communicate effectively both verbally and non-verbally
- to persuade and influence learner behaviors, attitudes, beliefs
- to use one's knowledge responsibly

Lemmer (1998:39) indicates that the ETD Practitioner's relationships need to be managed positively. Learners need to be understood and appreciated.

Learners benefit most from people who:

- have a genuine commitment to helping the individual
- use their interpersonal skills to facilitate the discussion
- are open and impartial
- provide good quality information and advice about the opportunities
- give constructive feedback about the learner's skills and potential
- warm and friendly
- respect others
- provide assistance beyond the typical learning situation
- treat learners fairly
- create variety in the learning process to accommodate different preferences for learning and that present challenges to the learners

Support should be available for learners when and where they need it, as far as possible. Meaning learner support should be given during the whole of the learning environment.

An effective support system will have all or most of the following components:

- initial guidance
- diagnostic assessment for basic and key skills
- assessment to identify 'at risk' learners, at the start and while they are on the programme
- monitoring of attendance at work and off-the-job training sessions
- regular reviews and evaluation of learners' progress
- tutorial support, giving learners unstructured time to raise issues and work out what to do about them
- welfare support, through which learners receive confidential advice and counselling on personal issues either from employer or provider staff, or from external support agencies.

### **Mentoring**

A mentor would be an experienced and trusted advisor. They give support when they act as a resource for information or as someone who can listen and comment on the learner's ideas, problems and solutions, acting as a sounding board. Mentors assist learners in their attempt to become more competent and also play a very important role in the personal development of the learner.

### **Tutor**

A tutor formally provides a learner support service to learners, individually or groups. A tutor is more than a mentor.

- They should encourage and support learners
- Should provide remedial tuition followed by feedback on assignment and practical tasks
- Inspire and support to boost morale, refresh spirits, and give advice and assistance at specific stages of the course.
- Organise practical training
- Give advice to learners on options and choices they have to make.

### **Counseling**

This is a learner support device or activity that can be used by mentors and tutors. This is regarded as mutual consultation and deliberation in which opinions and advice are given to the learner in need of support.

Counseling is positive support. It can range from admonition, advice, caution, dissuasion, warnings, persuasion and recommended actions and suggestions.

It is every learner's right to ask for additional support and assistance at any point during their learning process.

It is every learner's right to expect confidentiality with regards to information shared with an ETD Practitioner. We will discuss this later at length.

**Activity 1: (SO 1 – AC1)**

Briefly discuss the difference between counseling, mentoring and tutoring.

**Activity 2: (SO 1 – AC2,3)**

Briefly discuss why it is the right for learners to ask for additional support and confidentiality.

**Activity 3: (SO 1 – AC4)**

Explain your own role in terms of your existing skills and qualifications in supporting or guiding learners.

(For example if you are a health worker and have completed this course how will you be able to assist other health workers in their study skills?)

## Learners with Special Needs (SO 2)

Learners have varying needs due to the diversity they bring to the learning situation. By knowing each learner, there is a greater likelihood that the practitioner will deal with his or her needs. The need for help is often related to other behavioural symptoms the learner may be displaying. This behaviour is then related to some difficulty being experienced. The identification of this distress will only be possible if the facilitator knows the learner well so as to be able to identify unusual behaviour.

Knowing your learners:

The first thing that you should know is the names of your learners. Added to this you should get to know the characteristics that make learners different from each other, their circumstances, values, background and beliefs as a start to providing effective learner support.

To support learners it is useful to have a profile that would describe their most salient characteristics. Have a profile makes it easier to focus on those areas and issues that are most common to the majority learners. According to Hardingham (1996) and Kohong and Grundling (2000) at the most basic level information needs to be gathered about:

- demographics
- education background
- age group
- gender
- learner expectations and interests
- personal career development plans
- previous learning and work experience
- academic background
- learning skills
- rates of progression and completion of programme rates
- learning difficulties
- learning styles and habits
- logistics related to learning conditions
- facilities and resources available to the learners

## Diagnosing Learning Difficulties

Thousands of adults fit the following description. They are individuals who appear to be able and bright. They have worked diligently for a year, sometimes longer, to learn to read to improve comprehension skills, to improve their writing and spelling, or perhaps, to improve work skills. Yet, they make little, if any, progress. Could any of these individuals be having learning problems because of a learning disability?

**Typical learning or personal difficulties experienced by learners**

If a student has learning or personal difficulties, these may have to be addressed before he/she is emotionally ready to develop in his/her career.

- Learning difficulties may include disabilities such as blindness or deafness, which create difficulties in interacting in a classroom situation, or learning problems such as dyslexia or attention deficit disorder.
- Personal difficulties may include family problems such as difficulties caring for a child or sick relative, mental health issues such as depression or anxiety, domestic abuse or social victimisation.
- Barriers to learning can also be caused by other personal problems such as"
  - substance abuse,
  - obvious emotional distress,
  - poor health,
  - lack of self-confidence.

**Learning Disabilities Include:**

Learning disabilities fall into broad categories based on the four stages of information processing used in learning: input, integration, storage, and output.

- **Input:** This is the information perceived through the senses, such as visual and auditory perception. Difficulties with visual perception can cause problems with recognizing the shape, position and size of items seen. There can be problems with sequencing, which can relate to deficits with processing time intervals or temporal perception. Difficulties with auditory perception can make it difficult to screen out competing sounds in order to focus on one of them, such as the sound of the teacher's voice.
- **Integration:** This is the stage during which perceived input is interpreted, categorized, placed in a sequence, or related to previous learning. Students with problems in these areas may be unable to tell a story in the correct sequence, unable to memorize sequences of information, able to understand a new concept but be unable to generalize it to other areas of learning, or able to learn

facts but be unable to put the facts together to see the "big picture." A poor vocabulary may contribute to problems with comprehension – thus one should identify if there are any language barriers present.

- **Storage:** Problems with memory can occur with short-term or working memory, or with long-term memory. Most memory difficulties occur in the area of short-term memory, which can make it difficult to learn new material without many more repetitions than is usual. Difficulties with visual memory can impede learning to spell.
- **Output:** Information comes out of the brain either through words, that is, language output, or through muscle activity, such as gesturing, writing or drawing. Difficulties with language output can create problems with spoken language, for example, answering a question on demand, in which one must retrieve information from storage, organize our thoughts, and put the thoughts into words before we speak. It can also cause trouble with written language for the same reasons. Difficulties with motor abilities can cause problems with gross and fine motor skills. People with gross motor difficulties may be clumsy, that is, they may be prone to stumbling, falling, or bumping into things. They may also have trouble running, climbing. People with fine motor difficulties may have trouble buttoning shirts, tying shoelaces, or with handwriting.

### **More about Reading Disorders:**

The most common learning disability. Of all students with specific learning disabilities, 70%-80% have deficits in reading. The term "Developmental Dyslexia" is often used as a synonym for reading disability; however, many researchers assert that there are different types of reading disabilities, of which dyslexia is one. A reading disability can affect any part of the reading process, including difficulty with accurate or fluent word recognition, or both, word decoding, reading rate, prosody (oral reading with expression), and reading comprehension. Before the term "dyslexia" came to prominence, this learning disability used to be known as "word blindness."

Common indicators of reading disability include difficulty with phonemic awareness—the ability to break up words into their component sounds, and difficulty with matching letter combinations to specific sounds (sound-symbol correspondence).

### **More about Writing Disorders:**

Speech and language disorders can also be called Dysphasia/Aphasia. Impaired written language ability may include impairments in handwriting, spelling, organization of ideas, and composition. The term "[dysgraphia](#)" is often used as an overarching term for all disorders of written expression. Others, such as the International Dyslexia Association, use the term "dysgraphia" exclusively to refer to difficulties with handwriting.

### **More about Math Disability**

Sometimes called dyscalculia, a math disability can cause such difficulties as learning math concepts (such as quantity, place value, and time), difficulty memorizing math facts, difficulty organizing numbers, and understanding how problems are organized on the page. Dyscalculics are often referred to as having poor "number sense"

Practitioners need informal measures for determining whether or not a particular learner may have a learning disability. Given that most participants in literacy programs are unable to afford formal testing administered by trained professionals, the information gathered by the practitioner can be particularly valuable for planning a practical approach to helping the individual meet realistic goals. In fact, the information gathered through an informal process can be as useful in planning instruction as scores from standardized testing.

The process of identifying an individual who may have a learning disability begins with a simple **screening**. This screening process cannot alone be used to diagnose the individual's situation. This step of gathering relevant information can be accomplished through observation, interviews, self-reporting, the use of a screening tool (a brief test and/or written answers to questions), and through a review of school, medical, or employment records. With this information in hand, the screener - typically an individual who does not have a specialized background in learning disabilities - plans and executes an individualized program for the learner, often after consulting with a qualified professional or professional organization on how to proceed. The information gathered through the screening process can also be a valuable introduction to the formal process of assessment.

### **SCREENING**

Screening is an initial step in the process of gathering pertinent information about the individual with a suspected learning disability. The practitioner can attain much valuable information if s/he knows what to look for. In terms of academic performance and related behaviors, what kinds of observations will the practitioner be noting? The following characteristics tend to be displayed in varying degrees by individuals with learning disabilities. The lists are a good sampling, but, of course, are not all-inclusive. Making written notes of these observed characteristics, as well as collecting written samples of the learner's work, is very valuable to the screening process.

- Does the individual show unexpected underachievement, but demonstrates evidence of at least average ability in some intellectual or social areas?

- Does the individual display signs of poor vision or hearing? Or, are you observing the effects of auditory or visual processing deficits?
- In terms of academic performance, is the individual having problems in the following areas: Reading (oral and silent), Expressive Language (writing, spelling, handwriting), Math?
- Are you observing behaviors/psychological manifestations that can interfere with the learning process?

To help the practitioner think through the answers to these questions, three broad areas of learning-related problems are briefly described below.

### ***1. Vision/Hearing and/or Auditory/Visual Processing Problems***

If vision or hearing problems are suspected, it is important that the individual be examined by an eye (optometrist) or hearing (audiologist) specialist. It may be determined that there is a physical problem, leading to prescribed eye glasses or a hearing device. Many individuals with learning disabilities have poor eye muscle coordination for focusing and refocusing at close range, have had hearing problems since early childhood that have affected their ability to learn, and may also have auditory and visual processing and memory problems.

**Barring a purely physical cause**, the following problems can be considered indicators of a possible learning disability:

- Eyes water and/or become red after a short time of work
- Complains of tired eyes; rubs eyes a lot
- Puts head on desk to read
- Oral reading is choppy: words skipped, endings left off, frequent repetitions
- Loses place when reading
- Talks loudly
- Often asks you to repeat yourself
- Comments about getting headaches after a short time working at reading or writing
- Squints and peers close to see print
- Peers at work on desk from an angle
- Lifts eyes from page frequently to glance around
- Closes one eye while reading or writing
- Misunderstands you
- Turns an ear towards you when you speak



### Example of a Simple Eye Test (SO2 -AC3)

This simple screening tool is used for monitoring for early signs of wet AMD. The Amsler test consists of a grid of evenly spaced horizontal and vertical lines. A small dot is located in the center of the grid for the person taking the test to focus on. While staring at the dot, the person will look for wavy lines and missing areas of the grid. This test is especially helpful for monitoring vision at home.

The Amsler Grid is not a substitute for regularly scheduled eye exams, which should take place at least once every two years, and at least once a year after the age of 50. (You may need them even more often depending on your risk factors for AMD.)

However if you are concerned about AMD, and particularly if you have a family history, you are over 50, or you have other risk factors for the disease, you are encouraged to do the Amsler test on a regular basis. Place an Amsler grid on your fridge or in another location you see often. This way, you will be reminded to look at the test on a daily basis

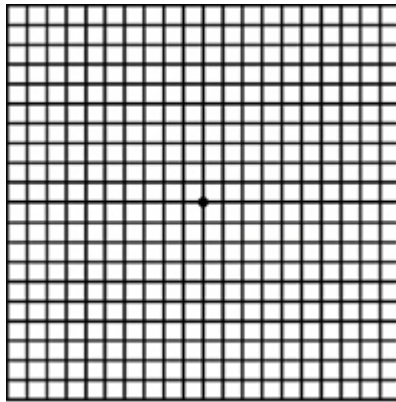
1. Make sure you are in an area with good lighting, and hold or post the chart at eye level and at a comfortable distance. You may find it convenient to attach the grid to a wall and stand 12 inches to 14 inches away (generally a comfortable reading distance).
2. If you wear glasses, keep them on. If you wear bifocals, use the bottom or reading portion of the lens.
3. Cover one eye and look at the dot in the center of the grid. Note how the lines and squares appear and whether or not there are any distortions or breaks in the lines of the grid. Also note if the centre dot, a part of the dot, or any of the lines disappear. Blurred or double images might not necessarily be abnormal. The use of progressive, lineless bifocals may introduce some distortion in the grid.
4. Test the other eye in the same way.

The whole process may take only 10 seconds. Check the grid daily, or as often as recommended by your eye care professional.

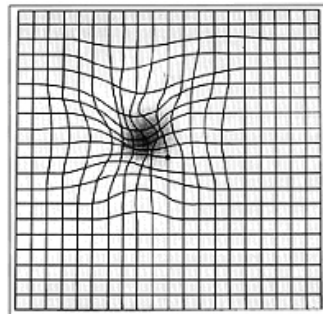
Remember, if you experience any of these changes, make an appointment with your eye care specialist immediately:

- Blurring or grey areas
- Distortion or wavy lines
- Holes or spots in any areas of the grid

This is a normal Amsler Grid:



This is how it might look if you had AMD:



**Taken from:** <http://www.cnib.ca/en/your-eyes/eye-conditions/amd/diagnosing/amsler-grid/>

You can visit the following site for more eye tests:

<http://www.brianseye.com/tests.htm>

## 2. Academic Performance

**Reading:** The learner shows marked difficulty in oral and silent reading.

- Reading patterns are slow and deliberate
- Skips words, re-reads lines in oral reading
- May substitute, delete, add or transpose letters and syllables
- Loses place on page
- Avoids reading out loud
- Reads words or syllables backwards; e.g., **was** for **saw**, **net** for **ten**
- When reading silently, appears to be re-reading or reading very slowly (this can be attributable to poor visual processing)

- Cannot use basic phonics to sound out words
- Reads with an overdependence on guessing and, as such, comprehension is compromised, evidenced in errors in answering questions related to the text
- Reading style is halty and jerky

**Expressive Language:** (*Writing, Spelling ,including Handwriting Skills*)

- Problems with grammar and syntax
- Writes letters or numbers backwards or upside down, e.g., **b** for **d**, **p** for **q**, **u** for **n**, **M** for **W**
- Spells words differently in the same document
- Weak visual memory for spelling
- Spells phonetically, cannot remember spelling patterns, e.g., **Munday**, **Toosday**, **Winsday**, **Thirsday**
- Writing reveals poor organization
- Inconsistent memory for sentence mechanics
- Reverses letters in spelling, e.g., **Friday** becomes **Firday**, **girl** becomes **gril**
- Mixes capital and lower case letters inappropriately, e.g., **SunDay**, **MoNey**
- Poor handwriting; letter formation inconsistent
- Punctuation errors are common
- Continuously whispers to self while writing

**Math:**

- Trouble remembering math facts and procedures
- Demonstrates inconsistent mastery of math facts (addition/subtraction, multiplication/division) due to problems with long-term memory
- Difficulty copying numbers and working with numbers in columns
- Trouble with left/right orientation
- Cannot remember in which direction to work in carrying out simple math
- Confuses similar numbers or transposes numbers
- Reads numbers backwards, e.g., **18** for **81**, **21** for **12**
- Trouble following sequential procedures and directions with multiple steps

In terms of academic performance, what practitioners/instructors are looking for are **patterns of errors** exhibited by the student's work. Error patterns are important in helping to differentiate between the adult with possible learning disabilities and the adult whose low achievement is the result of other factors. Therefore, it is important that practitioners familiarize themselves with typical error patterns.

### **3. Behaviors/Psychological Manifestations**

The following behaviors may indicate the possibility of a learning disability if observed over a considerable period of time.

**Attention:** difficulty concentrating/focusing; easily distracted; difficult sitting still/ restless; displays off-task behavior; lack of productivity; seemingly confused at times; fidgets; impatient; talks excessively; impulsive (acting without thinking and without seeming concern for consequences, saying one thing and meaning another, blurts out answers, interrupts); displays memory problems

**Organization:** poor organization of physical environment and time, as well as concepts and tasks, including sequencing, prioritizing, grouping or categorizing, grasping similarities between items, relating parts to the whole; orientation problems/difficulty with directionality: left/right, up/down, and north/south/east/west

**Other General Behaviors:** variable or unpredictable performance; difficulty absorbing major ideas from an oral presentations (instructions, lectures, discussions); information must be repeated and reviewed before understanding is achieved; problems with following directions; difficulty retaining information without excessive rehearsal and practice; cannot recall familiar facts on command, yet can do so at other times; visual difficulties, auditory difficulties, poor decision-making skills; difficulty drawing conclusions, making inferences, dealing with abstractions; poor motivation and/or extreme drive to complete a task; most comfortable with familiar, unchanging settings; perseveration (staying on task or using a procedure past the point of its being appropriate); rigidity

**Social:** social situations difficult, noticeably out of place in group setting; misinterprets what others say, tone of voice, facial expressions, the subtleties in social situations; lacks awareness of one's personal space; difficulty in establishing friendships

It is important to note that many of these observed learning characteristics and behaviors result from problems that the individual experiences in the areas of **visual discrimination** and **visual memory**, as well as **auditory discrimination** and **auditory memory**. Visual discrimination refers to the learner's ability to detect differences in forms, letters, and words. Visual memory is concerned with the individual's ability to retain a full mental image of what s/he has seen. In both instances, the central nervous system is not processing symbols correctly. Auditory discrimination involves the ability to recognize the differences between sounds. Auditory memory refers to the learner's ability to store and recall what has been heard. The result of an auditory deficit is that the individual fails to hear vowel or soft consonant sounds in spoken words. **Auditory and visual deficits** affect one's ability to develop and use language effectively; the effects are apparent in reading, writing, and spelling skills.

### ***Other Means of Information-Gathering***

Samples of the learner's work and observations of the individual's learning characteristics and behaviors can be recorded on an **observation checklist**. In addition, the information-gathering process can include:

- (1) **reviews** of school, medical, and employment records (wherein patterns of problems may be evident and should be noted);
- (2) a **screening interview** during which the individual can be encouraged to self-report problems in academic, social, medical, and employment areas, including similar information about family members to help determine possible familial factors known to correlate with learning disabilities;
- (3) a **screening questionnaire**; and
- (4) a **screening tool** (an instrument for which the administrator should be trained to use).

While formal testing provides the most accurate basis for planning an individualized learning program, the observations noted in the informal screening process serve a number of purposes:

- Screening sets the stage for the practitioner to help learners with suspected learning disabilities to understand their strengths and weaknesses and the reasons behind their struggles and difficulties.
- The informal nature of the information gathering process in screening enables the practitioner to include the learner in determining appropriate instruction.
- Informal screening opens the door for discussion between the practitioner and the learner regarding which strategies and/or interventions, if any, have been tried in the past.
- Screening can help establish the foundation for discussion between the practitioner and the learner about realistic long-range goals translated into short-term objectives.
- Screening helps the practitioner identify special materials and strategies to be used in setting up an individualized learning situation for the student.

For follow-up, the practitioner needs to be aware of local sources of testing and other services to which the learner can be referred.

Practitioners can be a vital link in the overall assessment process. If the individual with suspected learning disabilities does not undergo a complete assessment, informal screening provides the major source of information for establishing both long-range goals and short-term objectives, and for identifying instructional methods and materials needed to establish an individualized program that meets the learner's needs.



#### **Activity 4: (SO 2 – AC1,2,4)**

Discuss what signs to look for in identifying any of the following disabilities.

- Learning Disability
- Physical Disability
- Behavioral Disability

## Working Learning Disabilities (SO3/4)

Students with disability require everything that other students need, including clear information about course requirements, guidance regarding their rights and responsibilities, and advice about the learning and support options available to them. In addition, they may require advice about the implications of their disability in the new learning environment and planning to accommodate their needs.

### **To facilitate this:**

- Meet with prospective students early to discuss learning support needs.
- Make students aware of information and resources that may assist them and any timelines for arranging adjustment.
- Liaise with other teaching and support staff to ensure there is co-ordination of services and shared understanding of the student's requirements.
- Counsel students concerning problems in relation to learning
- Recommend or refer the student to relevant support programmes

Although students are not generally legally required to disclose a disability, you should provide frequent opportunities for students to discuss both the likely impact of disability on their studies and the appropriate adjustments required.

Some students with disability will identify themselves to the university or learning institution prior to enrolment and necessary support can be quickly arranged; in other cases, a student may be more reluctant to disclose their disability.

If you think a student might have a disability that is impacting their studies, you may wish to ask the student whether there is anything that you can do to ensure they are able to complete your course. You could also offer the assistance of the disability service. Remember that it is the implications of the disability or health condition in your course/unit that are important rather than the impairment itself.

Often a student's disabilities may not be obvious and so you may not realise that the student has a disability. This is where inclusive practices are very useful as individual needs are automatically accommodated and it is often unnecessary for individuals to disclose.



### Activity 5: (SO 2 – AC 5)

How should you handle a case where a learner has a disability which you cannot assist them with? Explain

### Paying Attention to Non Verbal Cues in Sensitive Situations

Most of what is communicated in any encounter between people, even those from the same culture, is not spoken, not interpreted as intended, and largely occurs outside of our awareness (e.g. not answering a person – usually a far more powerful ‘message’ than anything that might be said).

Certainly, this does not mean that verbal communication is unimportant, just that communication embraces all human behaviour. Therefore when working with learners we need to be very aware of the non verbal cues if we are to maintain a sensitive, caring and professional relationship.

Research has shown that "nonverbal cues play an enormous role in signaling interpersonal expectations, often within the first 30 seconds of an interaction" (Burgoon et al. 1989:448). Relaxed postures, dominance displays, leg movements, head-nodding, smiling, and "interested" facial expressions may show positive expectations; while head-shaking, eyebrow-raising, looking surprised or disappointed, and tapping a pencil may show negative expectations (Burgoon et al. 1989).

Non verbal cues are those that signal a particular state of mind either intentionally or unintentionally – let's look at some of these cues.

**A neutral, relaxed seemingly expressionless face:** Though "expressionless," the blank face sends a strong emotional message: "Do Not Disturb." The blank face is a subtle sign used to keep others a polite distance away. (*Note:* A blank face with naturally down-turned lips and creased **frown** lines may appear "angry" as well.)

**Body-shift:** A sudden body-shift may telegraph an unspoken feeling, mood, or opinion, and thus offer a probing point. Gross body-shifts may reveal anger, disagreement, and disliking more directly.

**Head-tilt-back:** Lifting the chin and looking down the nose are used throughout the world as nonverbal signs of superiority, arrogance, and disdain. (*Note:* Gross postural shifts which involve *back-extension* and *head-raising* may express unconscious attitudes of power and dominance.)

Head-tilt-back may be accompanied by "contempt-scorn" cues: one eyebrow lifts higher than the other, the eye openings narrow, the mouth corners depress, the lower lip raises and slightly protrudes, and one side of the upper lip may curl up in a sneer.

**Body adornment:** What we place upon our bodies (e.g., clothing, footwear, hats, makeup, and tattoos) adds colour, contrast, shape, size, and texture to our primate form. Each day, myriad messages of adornment broadcast personal information about our ethnicity, status, affiliation, and moods.

**Arm-cross:** A self-comforting, self-stimulating posture unconsciously used to alleviate anxiety and social stress. Though often decoded as a defensive barrier sign, the arm-cross represents a comfortable position for relaxing the arms, e.g., while speaking, as well. With arms and elbows pulled tightly into the body (i.e., flexed and adducted), the gesture may reveal acute nervousness or chronic anxiety.

Held less tightly against the chest, with elbows elevated and projecting outward (away from the body, i.e., abducted), the arm-cross presents a guard-like stance, suggestive of arrogance, disliking, or disagreement.

**Palm-down:** While speaking or listening to another's remarks, palm-down gestures show confidence, assertiveness, and dominance. (Palm-down gestures contrast with the friendlier, more conciliatory palm-up cue.) Accompanied by aggressive, palm-down "*beating*" signs, our ideas, opinions, and remarks appear stronger and more convincing. In particular, the palm-down cue is highly visible above a conference table, where it is raised and lowered like a judge's gavel.

*For further reading refer to the following website:*

<http://members.aol.com/nonverbal2/entries.htm#Entries> [accessed January 2006]

## Promoting Learner Participation in the Process

In order to promote learner participation one of the key skills required is listening. However, listening is more complex than just simply 'hearing' what the learner is saying – there are various strategies that can be employed to acquire the right information to guide the learner and engage them in the decision making process.

### Active Listening

Active listening is at the route of successful discussion and information gathering. In order to appreciate the skills of active listening consider the following three approaches and the purposes for adopting any one or all of them in the interview process.

- **Support listening**

The purpose of this technique is to encourage the learner to speak in order to learn what they think or feel. The more they say the more you are likely to learn. In collecting information avoid the temptation to put your own views forward until it really becomes necessary. As a listener, your role is to show that you understand without deterring the learner from continuing or unloading.

- **Responding listening**

This is a relationship building technique. Useful information can still be gathered, but the sharing aspect of communication is more valuable. You are showing the learner that you are interested in him/her, in what they have to say and how you can help them in the future. Your focus therefore is on the person rather than on the facts. Use dialogue to make them feel important and at ease.

- **Retention listening**

This technique is used when you need hard facts unlike support listening where you are determining the soft issues. You are listening primarily for information.

Hearing is passive, whereas listening is an active psychological process that enables us to attach meaning to the sounds that we hear. It requires practice, concentration and effort.

## Treatment and Intervention

Interventions include:

- **Mastery model:**
  - Learners work at their own level of mastery.
  - Practice
  - Gain fundamental skills before moving onto the next level
    - Note: this approach is most likely to be used with adult learners.
- **Direct Instruction:**
  - Highly structured, intensive instruction
  - Emphasizes carefully planned lessons for small learning increments
  - Scripted lesson plans
  - Rapid-paced interaction between teacher and students
  - Correcting mistakes immediately
  - Achievement-based grouping
  - Frequent progress assessments

- **Classroom adjustments:**
  - Special seating assignments
  - Alternative or modified assignments
  - Modified testing procedures
  - Quiet environment
  
- **Special equipment:**
  - Word processors with spell checkers and dictionaries
  - Text-to-speech and speech-to-text programs
  - Talking calculators
  - Books on tape
  
- **Classroom assistants:**
  - Note-takers
  - Readers
  - Proofreaders
  - Scribes
  
- **Special Education:**
  - Prescribed hours in a resource room
  - Placement in a resource room
  - Enrolment in a special school for learning disabled students
  - Individual Education Plan (IEP)
  - Educational therapy

## Referring the Learner (SO5)

It is important to refer a learner for further intervention in some cases. You should devise a short report on the learner's disability, this should include:

- samples of work causing the concern,
- description of difficulties encountered in the learning situation (such as access for wheelchairs, identified personal problems etc.

When discussing this with the learner adequate information on the referral must be provided to learner in order to reduce anxiety. This could include:

- address,
- time, nature of referral,
- people involved

One can refer such learners to a person or agency such as:

<p>African Disabled Refugees Organisation Advocacy and support of African refugees Tel: 073 195 0594 Email: adro@webmail.co.za Contact: Mr Anaclet Mbayagu</p>	<p>Age-in-Action Formerly SA Council for the Aged 36-on-Long, 1 st floor, Long Street, Cape Town Postal address: Box 2335, Cape Town 8000 Tel: 021 426 4249 / 4251 / 4258 Careline: 080 111 2131 Fax: 021 426 4290 / 4306 Email: saca@iafrica.com Web: www.age-in-action.co.za</p>
<p>Port Elizabeth Cnr Springbok / Van Duuren Streets, Gelvandale Postal address: Box 23349 Port Elizabeth Tel: 041 457 1466 Fax: 041 457 2304 Cell: 083 577 9448 Email : ecape@age-in-action.co.za</p>	<p>Grahamstown 22 Albany Road, Grahamstown Tel/fax: 046 622 5460 Email: grahamstown@age-in-action.co.za</p>
<p>Free State LT Trust Building, Elizabeth Street, Bloemfontein Postal address: Box 7805, Bloemfontein 9300 Tel: 051 448 1868 Cell: 082 934 4484 Fax: 051 448 2197 Email: freestate@age-in-action.co.za</p>	<p>Gauteng 130 Main St, Budget Rent-a-Car House, Johannesburg Postal address: Box 7603, Johannesburg 2000 Tel : 011 331 8509 Cell: 082 850 5013 Fax: 011 331 8510 Email: gauteng@age-in-action.co.za</p>
<p>KwaZulu-Natal 7 Flat 201, Wang House, 10 Mazenod Road, Greyville, 4001 Postal address: Box 70319, Overport, Durban 4067 Tel: 031 309 2012/23 Cell: 083 682 2286</p>	<p>Limpopo 79a Biccard Street, Office No. 3, Polokwane, 0699 Postal address: Box 4199, Pietersburg, 0700 Tel: 015 297 0231 / 2087 Fax: 015 297 8864 Email: limpopo@age-in-action.co.za</p>

<p>Fax: 031 309 2039 Email: kzn@age-in-action.co.za</p>	
<p>Mpumalanga 44 West Street, Middelburg,1050 Postal address: Box 22637, Wanderpark, Middelburg,1050 Tel 013 243 1186 Cell: 082 290 6442 Fax: 013 243 0314 Email: mpumalanga@age-in-action.co.za</p>	<p>North West Social Security Building, 980B Kgabi Avenue, Montshiwa, 2737 Postal address: Box 2145, Mafikeng, 2745 Tel: 018 381 4796 / 4787 Cell: 072 101 9655 Fax: 018 381 4793 Email: nwest@age-in-action.co.za</p>
<p>Northern Cape 5 Barrister St, Kimberley North, Kimberley, 8301 Postal address: Box 1819, Kimberley, 8300 Tel: 053 831 1830 / 9893 Cell: 082 568 4325 Fax: 053 831 1482 Email: ncapeage-in-action@telkomsa.net</p>	<p>Southern Cape 97 York Street Shamrock Place, Office 11, George 6529 Tel: 044 873 5422 Cell: 072 174 7322 Fax: 044 874 2936</p>
<p>Alexandra Disability Movement (ADM) Programme areas: advocacy, disability, job creation, women, welfare, children 161 9th Road, Kew, Johannesburg Postal address: Box 1636, Marlboro 2063 Tel: 011 882 1147 Fax: 011 443 0882 8 Email: jerryadm@telkomsa.net Contact: Jerry Ntimbane</p>	<p>Association for and of Persons with Disabilities Looks at needs of people with disabilities in the community and offers advice and assistance Ikhwezi Lokusa Rehab, Glen Avent Convent, Ikhwezi Township Postal address: Box 695, Umtata, 5100 Tel/fax: 047 535 0703/4 Email: ikrehab.admin@telkomsa.net Contact: Ms Ncediwe Ngwane</p>
<p>Association for Persons with Disabilities 47 Park Road, Willows, Bloemfontein Postal address: Box 20027, Willows, 9301 Tel: 051 444 2883 / 4 or 051 444 1660 Fax: 051 444 3443 Email: Elzarie Devenish (Director) elzarie@apdfreestate.co.za</p>	<p>Pretoria Academic Hospital, 8 Dr Savage Road, Pretoria Postal address: Box 25631, Gezina 0031 Tel: 012 328 6447 Fax: 012 328 6759 Email: laetitia@disabilitypretoria.org.za Web: www.disabilitypretoria.org.za Contact: Dr Laetitia Botha</p>
<p>Atteridgeville Association for People with Disabilities Postal address: Box 19655, Pretoria West 0117 Tel: 012 373 8928 / 9</p>	<p>Employment Solutions Protective Workshop Postal address: Box 25622, Gezina 0031 Tel: 012 325 6585</p>
<p>Mamelodi Association for People with Disabilities Postal address: Box 77231, Mamelodi 0101 Tel: 012 801 1448</p>	<p>Western Cape Association for Persons with Disabilities 2 Begonia Street, Milnerton 7441 Postal address: Box 1544, Milnerton 7435 Tel: 021 555 2881 / 2 / 3 / 4 Fax: 021 555 2888 Email: enquiries@apd-wc.org.za or director@apd- wc.org.za Web: www.apd-wc.org.za Contact: Johan Joubert</p>
<p>KwaZulu-Natal Association for Persons with Physical Disabilities 65 Gemini Crescent, Woodhurst, Chatsworth</p>	<p>Worcester Workshop Association for the Physically Disabled (Western Cape) Worcester APD</p>

Postal address: Box 561793, Chatsworth 4030 Tel: 031 403 7041 / 74 Fax: 031 403 7294 Email: apdkzn@mweb.co.za	Postal address: Box 878, Worcester 6850 Tel: 023 347 2002 Fax: 023 347 2178 Email: wapd@telkomsa.net
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For more information on Associations in South Africa on disabilities you can visit the following website:

[http://www.unisa.ac.za/contents/management/arcswid/docs/Disability\\_directory\\_allsorts09.pdf](http://www.unisa.ac.za/contents/management/arcswid/docs/Disability_directory_allsorts09.pdf)

It will further be required of you to implement strategies to assist learner during his/her study this could include:

- Willingness to help the affected learner to learn.
- Ensure that the learning environment is organised to alleviate difficulties (e.g. seating learner closer to the front, negotiating help from other learners)
- Implementing recommendations from testing or referral agency.
- Record progress and reasons for progress or non-progress and ensure the learner has access to these at all times.
- Recognise when own interventions are not succeeding and refer timeously to relevant person for discussion.
- Report success/failure of recommendations to the relevant authority. Report should include areas in which the programme was successful or was not successful.
- Re-assess the learner's progress and the intervention strategy at regular intervals agreed to by the learner and practitioner

## **Investigate and Respond to Absenteeism and Drop-out. (SO6)**

The reasons for learner absenteeism vary, but generally fall in three broad categories.

Firstly, there are reasons for absenteeism associated with personal factors, such as illness, age, gender and learning difficulties. Secondly, absenteeism may be caused by socio-economic factors relating to food insecurity, problems with transport, the impact of HIV/AIDS on families and pregnancy. Finally, there are a range of reasons relating to schools that may contribute to learner absenteeism. Inability to pay fees may lead to absenteeism, poor learner - educator relationships contribute to absenteeism, as do poor facilities.

Unusual incidents of absenteeism or drop out of learners should be identified and investigated.

The investigation should include:

- group discussions with learners,
- visiting or telephoning learners,
- questioning friends or relatives,
- consulting other development agents in area.

Plausible reasons for absenteeism and dropout should be presented and analysed.

The analysis must indicate whether the barriers to attendance are motivational or situational and whether responses lie within or outside the learning programme.

Strategies or solutions, which are consistent with feedback received, should be proposed. This could consist of:

- changing class times,
- negotiating changes with employers and trade unions,
- changing own facilitation style or approach

Support for the proposed strategy should be sought from relevant people or agencies in the local context. This should be done via:

- consultation with employers,
- trade unions,
- transport providers,
- local councilors



### Activity 6: (SO 6)

Discuss in detail reasons for drop out and how you as an educator can monitor and adjust training to illuminate or reduce the drop out factor.

## Self Assessment



### Self Assessment:

You have come to the end of this chapter – please take the time to review what you have learnt to date, and conduct a self assessment against the learning outcomes of this module by following the instructions below:

Rate your understanding of each of the outcomes listed below:

Keys: ✖ - no understanding

● - Some idea

✓ - Completely comfortable

NO	OUTCOME	SELF RATING		
		✖	●	✓
1	Define own role, as an ETD practitioner, in learner support			
2	Recognise learners who have special needs.			
3	Discuss with learner the need for further intervention.			
4	Refer learner for further intervention.			



### Portfolio Activity:

Please refer to your workbooks and complete all the questions and assignments to be submitted as your portfolio activity. Also attach all the activities that was during module 1.

## Module 2 - Guide and Support Learners

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### Learning Outcomes:

The following learning outcomes are covered in this module.

- ✓ Diagnose and make recommendations concerning learner problems in relation to learning and assessment
- ✓ Identify and analyse learner needs;
- ✓ Counsel learners concerning problems in relation to learning and assessment;
- ✓ Advise learners concerning their learning and development
- ✓ Prepare and review an individual development plan;
- ✓ Provide guidance to learners;
- ✓ Maintain records of learner issues, records and guidance provided
- ✓ Evaluate services provided.

## Learner Needs Analysis (SO1)

Before training design or implementation issues are considered, a careful needs analysis is required to develop a systematic understanding of where training is needed, what needs to be taught or trained, and who will be trained.

Unless such a needs assessment has been adequately performed it may be difficult to rationally justify providing training.

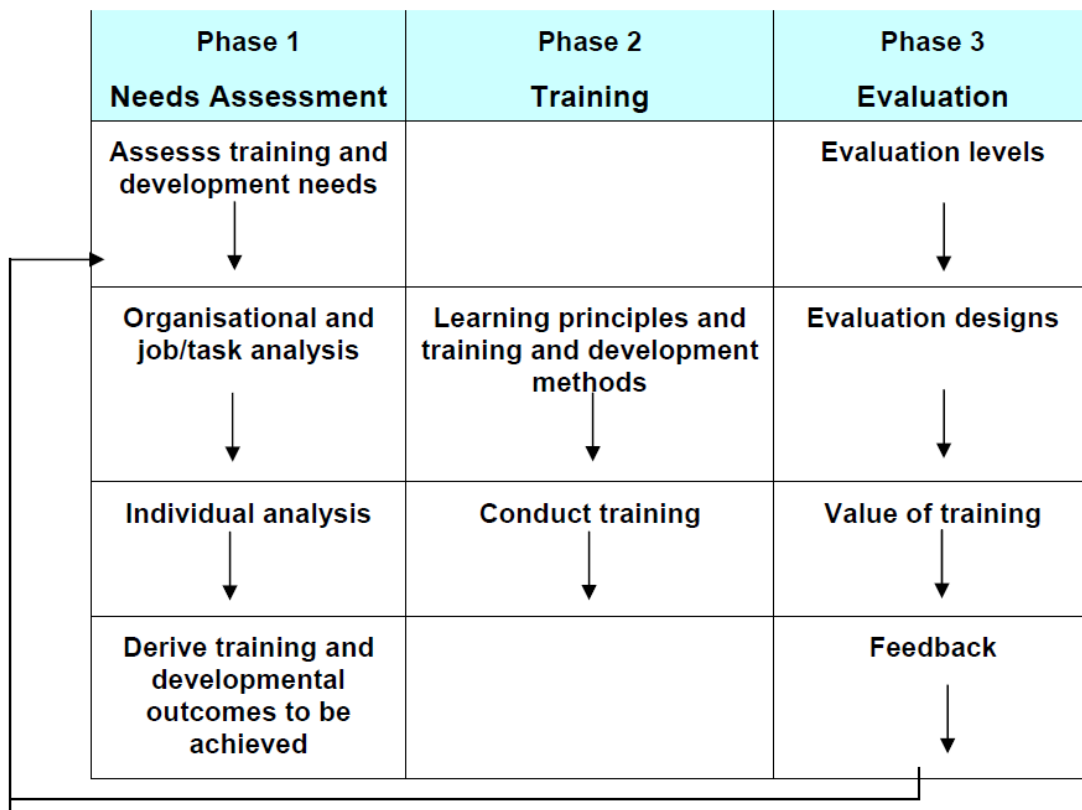
Such a needs assessment should enable an explanation to be given on why the training activities should be done, and also show that training is, in fact, the best solution for the performance problem or development need.

A needs assessment can be an important tool for any trainer or organisation planning a programme or course. Accurate needs assessment can help develop a programme or course based on the real needs of the people that it is serving. As time is often limited in training programmes, courses which takes learners' needs into account can ensure that what is most useful for learners is covered.

The Learning Needs Analysis conducted should identify the nature of the learner's needs such as:

- Learning and assessment opportunities;
- Learning and assessment anxiety;
- The need and opportunities for recognition of prior learning; and
- Barriers to learning.

General system model for people development (based on Swanepoel, Erasmus, van Dyk and Schenk, 2003, p. 454)



The adult education process has to be learner oriented which means everything should be related to their needs, expectations, attitudes and interests. Adults choose to learn for different reasons, more often related to their life and professional situations, plans and prospects. In our dynamic and ever-changing world life-long learning has become a need and a reality. The adult education service gives people the opportunity to move with the times and to cope with its challenges. Not only are the numbers of learners growing, but the diversity of learners is increasing as well - people with different economic, cultural, ethnic, political, religious backgrounds, people with different kinds of disability, different age, sex, professional status and so on. They have different life and study experience and different levels of skills for learning. Some of them have not been involved in the study process for a long time which could be a barrier in their achievement success.

### **What kinds of needs are there?**

The individual needs may be personal, performance-related or career-related, and will include needs, amongst others for:

- updating knowledge, skills and job-related competences;
- increasing job satisfaction and the fulfillment of personal goals;
- making decisions about career choices and career progression;
- identifying personal strengths and weaknesses;
- identifying and achieving work values and work targets;
- developing communication, personal effectiveness and life skills;
- improving qualifications;
- individual learning and self-development;
- building self-awareness, self-confidence and motivation
- understanding their own barriers to learning

The adult educator has to take care not only of her/his preparation and good teaching, but also of the learners ability to learn effectively by achieving their goals and objectives.

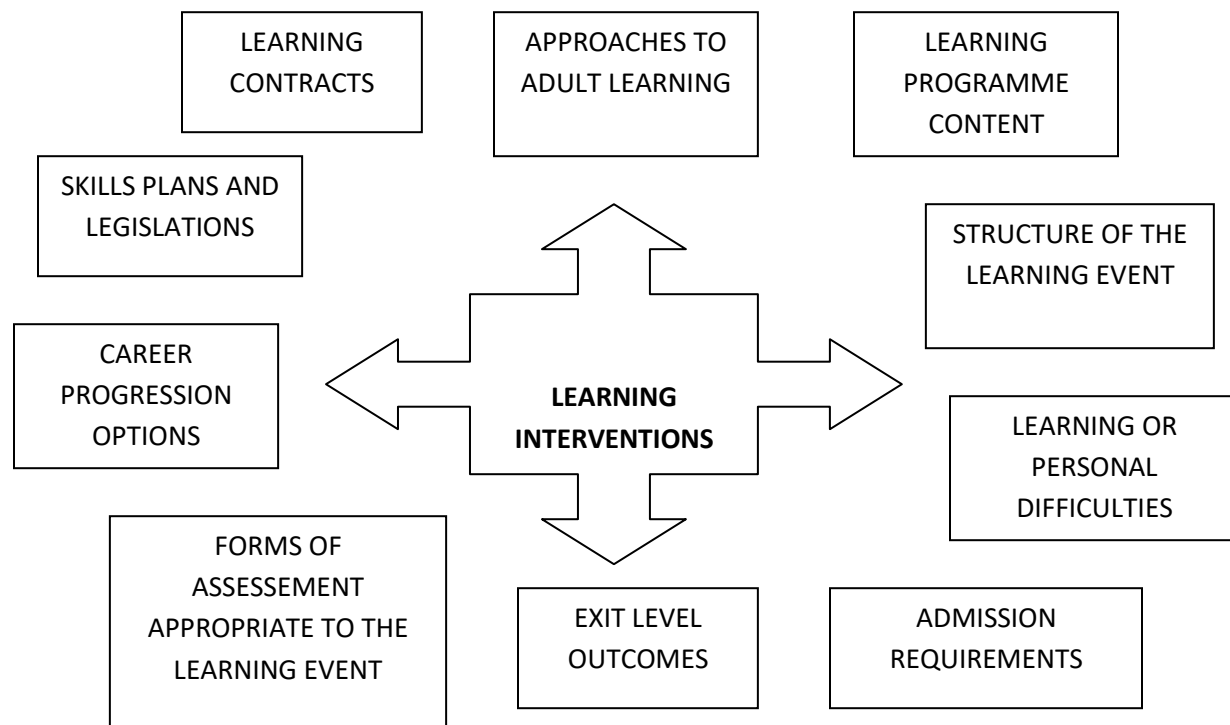
The aim of this part is to help you to be a more supportive adult educator, by developing and improving your learners' ability to perform.

The objectives are related to specific help in:

- identifying your ability to support learners
- identifying your learners' study skills
- helping learners to self-assess and peer-assess their different learning skills
- identifying learning styles and strategies
- improving awareness of the types and kinds of study skills
- using suitable methods and techniques for different skills development
- creating a positive and supportive environment

There are many considerations to successful learning interventions for both the individual and the organisation. These may include the consideration of the following factors:

- alignment to the skills plan and legislation (particularly with regard to previously disadvantaged persons);
- cognisance of individual skills gaps to achieve job performance;
- appropriate learning programme content;
- structure of the learning event (contact time, distance learning, experiential learning etc.);
- admission requirements;
- exit level outcomes;
- learning contracts;
- approaches to adult learning;
- forms of assessment appropriate to the learning event;
- career progression options within the occupation; and
- all of the typical learning or personal difficulties experienced by learners at various stages of their learning process.





### Activity 7: (SO1)

What should be considered when conducting a learning needs analysis?

### Reviewing Learner Needs (SO2)

Assessing the specific needs, interests and goals of learners is integral to achieving the goal of “learner-centred” development and this takes place at the outset and then applied throughout the learning process. Here are some considerations when reviewing learner needs.

#### Admission requirements – formal qualifications

Learners are guided by admission requirements, which are available from each institution. However, it is useful to provide prospective learners with the following National Qualifications Framework so that they can pinpoint where they are most likely to fit in.

NQF LEVEL	BAND	QUALIFICATION TYPE	
10	HIGHER EDUCATION AND TRAINING	<ul style="list-style-type: none"> <li>• Post-doctoral research degrees</li> </ul>	
9		<ul style="list-style-type: none"> <li>• Doctoral research degrees</li> </ul>	
8		<ul style="list-style-type: none"> <li>• Masters degrees</li> </ul>	
7		<ul style="list-style-type: none"> <li>• Professional Qualifications</li> <li>• Honours degrees</li> </ul>	
6		<ul style="list-style-type: none"> <li>• National first degrees</li> <li>• Higher diplomas</li> </ul>	
5		<ul style="list-style-type: none"> <li>• National diplomas</li> <li>• National certificates</li> </ul>	
<b>FURTHER EDUCATION AND TRAINING CERTIFICATE</b>			
4	FURTHER EDUCATION AND TRAINING	<ul style="list-style-type: none"> <li>• National certificates</li> </ul>	
3			
2			
<b>GENERAL EDUCATION AND TRAINING CERTIFICATED</b>			
1	GENERAL EDUCATION AND TRAINING	Grade 9	ABET Level 4
		<ul style="list-style-type: none"> <li>• National certificates</li> </ul>	

## Illustration of the National Qualifications Framework (NQA) Structure

It should be noted that learners may apply for formal recognition of existing competencies that were previously disregarded. This process is known as Recognition of Prior Learning (RPL). According to SAQA, a qualification may be achieved in whole or in part through the recognition of prior learning. It is an opportunity to:

- validate people's skills and knowledge;
- recognise and accredit knowledge, skill and experience that may result in credits towards a qualification;
- promote lifelong learning and a culture of learning;
- redress historical disadvantages;
- lead to the broader development of people;
- improve access to education;
- improve access to jobs and people's progression in their chosen career paths;
- assist in skills planning; and
- assist workers in retaining self-esteem and confidence.

## Learning Contracts

When an organisation offers an opportunity to sponsor the learning of an employee it is usual that both organisation and learner will enter into a contract. Essentially both parties to the contract should stand to gain. For example, the organisation will enjoy employees who are better equipped to carry out their jobs and the employees will gain skills and knowledge that will promote their career opportunities.

During this process, both organisational needs and learner needs should be explored and aligned.

Learning contracts enable trainers to cope with the wide range of abilities, needs, interests, experience, incentives, motivation, background and education that are characteristics of most adult learning groups. These characteristics can be accommodated through contract learning.

**A learning contract could be identified as a written agreement between the organization or institution and the learner. It is a commitment and an undertaking in which:**

- The learner agrees to and gives assurances that learning objectives, outcomes and standards set out in the learning contract will be met. In other words an attempt will be made to achieve the predetermined, needs-orientated goals.
- The organization agrees to support the learner and ensures that transference of learning takes place as soon as possible.
- The trainer will offer a learning opportunity.

**A learning contract can also be used as a guideline by trainers, organisations and learners and must, therefore include:**

- Learning objectives
- Learning resources and strategies
- Evidence of accomplishment of objectives
- Criteria and means for validating the evidence of accomplishment of objectives

### **Diagnose your learning needs**

- Identify the gap between what the learners actually know and what they must know for effective performance in whatever task they are involved in. This can be done by pre-assessment)
- List all the competencies that need to be performed to achieve excellence in a task.
- Leads to a definition of the learning needs and therefore to the training content to be mastered and the levels of performance that both trainer and learner should achieve.

### **The Structure of Different Programmes**

Different programmes are structured to suit different individuals and organisations depending on time available for study. Learners should be aware of the following methods of delivery:

- Full time study
- Part time study (either block release, evenings or Saturdays)
- Distance learning (minimal contact time)
- E-learning (computer mediated study)

## Learning Programme Content

The learning programme content is determined by the desired exit level outcomes.

For example, in the qualification called Further Education and Training Certificate: Human Resources Management and Practices Support the exit level outcomes are:

On completion of this qualification, the learner will be able to:

- a) Perform administrative duties related to human resources management and practices.
- b) Support the implementation procedures and systems related to human resource management and practices.
- c) Collect, collate and distribute information related to human resources management and practices in the context of a predetermined plan.
- d) Provide advice on or refer to appropriate person in response to queries on organisation procedures related to human resources management and practices.
- e) Demonstrate basic understanding of people dynamics and impact in the workplace.
- f) Demonstrate basic understanding of the functioning of business and the role and contribution of individuals within organisations.
- g) Identify strengths and areas for improvement in own learning through self-reflection and reflection on support for organisational human resources management practices.

The content in order to achieve these exit level outcomes is then designed and facilitated over a period of time. To evaluate a programme in terms of meeting a learner's needs it is then important to review the exit level outcomes and match these with learner needs.

### **Career progression options within the occupation**

Progress is necessary for satisfaction and is an integral part of development. So when an employee comes to you for assistance, you need to establish where that individual would like to see him/herself in the future in order to guide the support you provide. You may also need to consider the realism of the learner's aspirations in order to set him/her on a course that will result in an incremental success on a small target rather than a failure to achieve a major, unrealistic target.

Positive thinking is very much the key to successful career progression. The successful candidate is the one who looks forward and not backwards, maximises his/her previous experience and identifies his/her skills to use as a basis for attaining a new career level.

Employees should also consider conducting research into the articulation options of programmes so that progression is ensured. Most programmes will state the articulation options.



### Activity 8: (SO2)

What is the purpose of a learning contract?

## Sources of Information

### Corporate Multiversity

The most effective learning organizations today serve their workforces on multiple levels - meeting multiple needs, offering multiple curricula, using multiple delivery methods.

#### **What Is the Corporate 'Multiversity'?**

Corporate universities were first created in the late 1980s as an enhancement to traditional training departments. This new approach was designed to align the training aim of companies with the organisations' vision and strategy. Critics claim that higher education programmes are too out of touch with businesses of today, and they desire a training approach that closely parallels their real-world concerns. Companies are recognising that developing people is a top priority in today's competitive environment. Additionally, they recognise the need to capitalise on technology to maximise the knowledge bases in organisations.

Corporate universities can range from a training department looking to brand its offerings to divisions of companies that offer accredited degree programmes.

Sometimes the focus of a corporate university is on making the outsourcing of training a core competence, while in other cases, the training is developed by a team of learning professionals within the organisation.

Corporate universities offer a powerful model for learning that compels learners to grow and develop. Most importantly, they can have long-term positive effects on a company's financial health and stability.

Since corporate universities have been around for decades, there are many examples of best practices. Some prominent corporate universities include Charles Schwab University, Disney University, General Electric's Crotonville, McDonald's Hamburger University, Motorola University, Oracle University and University of Toyota.

Whichever route your organisation takes – corporate universities, in house training/development, externally sourced programmes, learnerships etc. they all need to be relevant to the needs of the organisation and learner.

A multiversity is a learning organization built on a series of multiples: serving multiple needs and goals, offering multiple curricula, serving multiple career paths and using multiple delivery methods and technologies. Those multiples are at the heart of the distinctive value proposition of corporate learning and are reshaping the way that companies, governments and even many traditional universities think about the role of education in creating the workforce of the future.

At a time when an impending shortage of relevant, differentiating job skills is on the minds of many corporate executives — especially as the economy begins to recover — there is some urgency around whether the traditional university model is producing graduates who have learned how to learn and who are capable of collaborative and interactive working behaviors.

Given the deficiencies of the traditional university, the corporate multiversity will play an increasingly important role not only in providing job-specific training and career advancement, but in skilling and re-skilling workers to thrive in a challenging economy operating under new rules. The growing power of corporate multiversities will also reshape the way that alliances among industries, universities and governments are forged and for what reason.

**Multiple delivery methods:**

Different learning modalities — such as classroom, asynchronous and synchronous e-learning, and mobile — are driven by individuals' needs and learning styles. This includes multiple learning methods within the same course or curriculum to reinforce knowledge and shape new behaviors.

**Multiple time frames:**

The traditional university setting is paced and designed for set time frames — semesters, trimesters, quarters. The multiversity setting is paced and designed around business needs, such as career advancement, new strategies and different assignments.

**Multiple needs and goals:**

The multiversity can accommodate predictable kinds of learning experiences, such as new-hire training or general career advancement, as well as very timely needs having to do with new products or strategies. This produces a learning environment that is more agile and relevant to the needs of the business.

**Information that is relevant and sufficient**

Given that various options exist to expedite training, customised training that incorporates information which is relevant and sufficient is fast becoming more readily available. Accredited service providers, who specialise in say, retail knowledge or travel knowledge, can be commissioned to develop short courses or programmes in line with individual and organisational need. Whilst the organisation enhances its skills base (human capital), learners acquire the respective credits, which are both transferable across industries and qualifications.

One important development in terms of learning is the support that technology can offer to ensure that learning continues irrespective of commitments that learners might have.

For example, a learner who is required to travel frequently may have access to learning units on line so that he/she can maintain progress – a very real need in our global economy.

Sufficient information means that the learners have received enough guidance for them to be able to apply this information to the required standard. However, information alone is often not sufficient for learners – they need practice. Offering learners opportunities to continually re-enforce learning is essential to meaningful development.

<b>DATA</b>	Facts, observations, data points
<b>INFORMATION</b>	Data with context – contextualized, categorized, calculated, corrected, condensed
<b>KNOWLEDGE</b>	Information with meaning – comparison, consequences, connections and conversations
<b>WISDOM</b>	Deductions and insights, accumulated knowledge or experience

Knowledge derives from information as information derives from data. If information is to become knowledge humans must do virtually all the work.

We can therefore say that knowledge is more than an accumulation of bits of information. Since it ultimately resides within individuals, it is their application of understanding to a set of information - experiential. This transformation happens through such 'C' words as:

Comparison:                    How does information about this situation compare to other situations we have known?

Consequences:                What implications does the information have for decisions and actions?

Connections:                 How does this bit of knowledge relate to others?

Conversation:                 What do other people think about this information?

Clearly, these knowledge-creating activities take place within and between humans and through the use of all our senses. We can then deduce that knowledge creation is a socially mediated process.

**Approaches to teaching which will support all students to learn include:**

- Making sure students know what and how they are expected to learn: that is, they are told or can accurately work it out for themselves. This can be done by:
  - previewing new topics and showing how the new material fits in with other parts of the subject
  - making explicit what you expect students to learn from a lecture or tutorial
  - summarising the main points of a topic and making clear how that topic will be assessed

- Integrating instructions on how to learn with teaching content
- Designing the workload so that students have time to reflect on what they have learned, to see how it fits in with their previous learning and experience, and to work out what they will need to learn next
- Helping students see the relevance of their learning to broader personal and vocational goals.
- Provide opportunities for students to relate what is taught in class to their own experiences and values
- Demonstrating your interest and enthusiasm for your subject. Your students will better appreciate the intellectual challenge if you relate your teaching to your research interests and activities
- Providing adequate feedback on how students are progressing with their learning, particularly in regard to their learning goals
- Assessing students' learning in line with what they thought they had to learn
- Providing opportunities for students to learn how to deal with assessment tasks before the final assessment

### **How Supervisors can become part of supporting learners?**

#### Include Learners in Training and Development Planning

The learner will get the most out of the plan if he or she feels strong ownership in the plan. Ownership comes from taking part in developing the plan. Also, professional development rarely includes only gaining knowledge and skills about a job role. Professional development often includes self-development, as well, e.g., admitting one's limits and capabilities. Learners are often the best experts at realizing their own needs for self-development. Therefore, learners should be involved in as much as possible in developing the plan.

#### If Available, Have Human Resources Representative Play Major Role

A trained human resources professional can be a major benefit in employee development. The representative usually has a good understanding of the dynamics of training and development.

The representative often has strong working knowledge of the relevant policies and procedures related to training and development. In addition, the representative can be an impartial confidant for the learner.

### **Provide Ongoing Feedback and Support**

Even if things seem to be going fine, be sure to stop in and visit the learner on a regular basis. Some learners may not feel comfortable asking for help. Supervisors should provide any feedback, that is, timely and useful information for the learner. Provide ongoing affirmation and support.

### **When Assessing Results of Employee's Learning, Maximize Feedback About Performance**

Consider getting feedback from the learner's peers and subordinates about the learner's needs and progress to meet those needs. A 360-degree performance review is a powerful practice when carried out with clarity and discretion. When first carried out, it may be wise to get the help of an outside professional.

### **Budget Necessary Funds for Resources Learner Will Need**

Funds may be required, e.g., for course tuition and materials, self-study materials, videos, training fees, labor to attend courses, etc.

### **Supervisor and Learner Should Set Aside Regular Times for Meetings**

Scheduling meetings beforehand makes it much more likely that regular, ongoing feedback will occur between the supervisor and learner.

### **Learnership and Skills Programmes**

A number of organisations will offer learnerships and skills programmes related to their particular fields. Where learners want to follow a particular skills development programme in a particular field, the relevant organisations that provide such opportunities will have to be identified. This can be achieved by referring to the SETA for the field of interest. The Skills Development Act clearly states the functions of the SETA as including:

- Implementing its sector skills plan by establishing learnerships.
- Promoting learnerships by identifying workplaces for practical work experience
- Registering learnership agreements

The various SETA's will be valuable sources of reference for identifying career and employment opportunities and learning pathways.

## Corporate Library

Not all organisations have the same resources. Some organisations have library facilities while smaller organisations do not. Should the need for a library be critical for success in the programme your organisation is facilitating, it would be useful to make contact with a library to which all the learners can have access and ensure the resources are available to support the activity that needs to be done. Alternatively, have a central place accessible to all that need the information.

### Example of a Resource List:

Resource	Useful For
Aids/HIV counsellors	Aids Counseling
Social Workers	Social Problems.
Clinical Psychologists	Personal Problems
Human Resource Manager	Company policies and procedure

## Maintaining and Managing Resources

Resources to support learners in the organisation are generally a budgeted item and consideration is given to expenditure on the following:

- Compliance with legislation;
- Employee guidance (e.g. cost of a skills development facilitator, counsellors);
- Instructional services (staff training and development in all its forms);
- Operational manuals (policies and procedures);
- Operation and maintenance of information resources (library, data bases, journal subscriptions etc.);
- Study leave; and
- Attendance at seminars and conferences (accommodation, travel, expenses, time away from the office).

Since information and support services can consume large amounts of scarce resources they need to be planned for carefully and motivated in terms of their contribution toward achieving development and organisational objectives. Consequently both a review of resources and services should be carried out on a regular basis.

## Information Management System

In the 1970s, managers realised that they could use computer-based information systems for planning, control, decision making and problem solving rather than just for reporting transactions. These new types of information systems became known as Management Information Systems (MIS).

Human resource management can be classified into five main activities:

- a) Employee record management
- b) Promotion and recruitment
- c) Training records
- d) Evaluation and
- e) Compensation and benefits management

MIS easily facilitates employee record management that satisfies both external regulations and internal policies and procedures.

Many HR and training systems are now completely digitised including employee pictures and scanned copies of important documents such as certificates of competency, which dramatically reduces the space needed to store records and the time needed to retrieve them.

To select the best qualified person for a position, the HR manager can search a database of applicants and existing employee's records for set criteria, such as a specific type of education, competencies, particular experience etc. Automating the process significantly reduces time, but does require that the database is current.

In many sectors, multimedia software training is supplementing training programmes reducing the costs of classroom facilities and teachers. Using intranets, many organisations promote access to organisational training information, which provides learners with up to date news about products and essential information to promote higher productivity.

## Security

Organisations need to control access to their records, as records contain personal and operational information that should be protected against unauthorised access. Therefore, electronic records management software controls or limits must provide access to records, files and metadata on user as well as group levels.

For disaster recovery purposes systems must include comprehensive controls to provide regular back up of the records and metadata, and to be able to recover rapidly any records if lost because of system failure, accident, security breach etc.

**Excerpt from the 'Managing electronic records Policy Guidelines document':**

An organisation keeps information resources to support its operations, as well as to fulfil legal and other obligations.

All information resources, whether they are in paper-based, electronic or other format, should be managed by the organisation in terms of the broad policy guidelines contained in the National Archives and Records Service Act of South Africa, 1996 as amended. It is essential for each organisation to establish its own records management policy to link its own unique processes and procedures to the requirements of the National Archives and Records Service of South Africa Act. The policy should not only be in line with the Act, but should also link up with the organisation's overall mandate and mission objectives. It should specifically address the management of electronic records and should take into account the unique characteristics of the specific electronic applications that are in use by the specific office.

Source: [www.national.archives.gov.za](http://www.national.archives.gov.za) [accessed April, 2006]

## Individual Development Plans

An Individual Development Plan (IDP) is:

- A clear statement of an employee's career goals,
- A map for attaining goals that specifies immediate and long-range developmental needs,
- An individually-tailored action plan to develop specific competencies (knowledge and skills) needed to improve performance in present position or to prepare for new responsibilities,
- A written plan for scheduling and managing an employee's development,
- A tool for a supervisor to estimate resources needed for employee development training,
- An agreement between the employee and supervisor based on funds available to meet the employee's and the organization's goals and
- A tool for an organization to develop its workforce to meet future needs.

### Purpose of the IDP

Most employees want to grow in their present positions or progress to new ones. To do this effectively, a realistic action plan is needed. An IDP can be a useful tool to help plan a career, guide development and assess progress toward career goals and objectives.

## Benefits to Employees and Supervisors

IDP's should provide meaningful training plans that will help the:

EMPLOYEE to...	SUPERVISOR to ...	TRAINING PROVIDER to..
<ul style="list-style-type: none"> <li>• Perform duties according to established job standards,</li> <li>• Improve job performance,</li> <li>• Set reasonable goals,</li> <li>• Assess particular strengths and weaknesses and,</li> <li>• Schedule and plan own individual development each year.</li> <li>• To benefit from an IDP, you must be involved and make a serious commitment to your career future. It may take several hours of your time, but it's an effort that should later prove to be well worth the investment.</li> </ul>	<ul style="list-style-type: none"> <li>• Aid in the development of their employees to achieve the knowledge, skills and competencies according to their performance standards,</li> <li>• Accurately document the current developmental needs of their employees and ,</li> <li>• Consider the unit's and/or agency's organizational needs, mission changes, changes in technology, expected turnover, staffing needs, program plans and future needs for particular skills.</li> </ul>	<ul style="list-style-type: none"> <li>• Forms a guideline for the provider to conduct effective training</li> <li>• Assists in the process of identifying outcomes for effective learning</li> <li>• Gives an indication of the learner's ability and current level of understanding.</li> <li>• Evaluate the effectiveness of the training programme</li> </ul>

### When Should an IDP Be Prepared?

IDP's should be prepared annually at performance appraisal time for those individuals requiring IDP's.

### Relationship Between the IDP and Performance Appraisals

An IDP and a performance appraisal have the same focus; fostering individual and organizational improvement. However, a performance appraisal is more like an end-of-year profit and loss statement while an IDP is an investment plan. They should work together, but they have different orientations.

As part of the annual performance appraisal process, the supervisor/manager analyzes the employee's job and its requirements and communicates expectations and performance standards to the employee. Then throughout the year, the supervisor assesses the employee's performance and gives feedback on a regular basis. At appraisal time, the supervisor compares the employee's performance to the previously established standards, makes a determination about performance level, discusses this with the employee and together they set standards for the upcoming appraisal period.

## Step 1 - Overview Of The IDP Process

### The IDP Process

The IDP process is a continuing cycle of planning, implementation and evaluation between an employee and supervisor, for the mutual benefit of both the employee and the organization. It is more than a swift review of course catalogs. It requires time to:

- Analyze job requirements,
- Assess current competencies and
- Make informed decisions about developmental needs.

The critical factors throughout all phases of the IDP process are interaction and effective communication between the employee and supervisor. For the process to be effective and meaningful, each phase must be approached as a joint endeavor.

### Tools for the IDP Process

There are tools available for analyzing jobs to determine requirements. One that should be readily accessible is the position description. Performance standards and performance elements also spell out job requirements.

### Phases of the IDP Process

The IDP process consists of five phases. The following table gives an overview of the process and tells you where in this guide to look for information on how to complete each phase.

Phase	What Needs to be Done	Section
1	Pre-Conference Planning	B
2	Employee-Supervisor Conference	C
3	Selecting Optimum Developmental Activity	D
4	Preparing the IDP Form	E
5	Implementing the IDP	F

## Step 2 - Pre-Conference Planning

### Purpose of Pre-Conference Planning

The purpose of the pre-conference planning phase is to prepare the supervisor and employee for their joint conference.

Both the employee and the supervisor have specific preliminary data-gathering responsibilities. This planning will not only provide time for discussion during the conference, but should also ease tensions and provide direction to the discussions by having this information readily available.

## Overview

This section describes specific roles and responsibilities related to pre-conference planning. As you will see, both the employee and the supervisor have many questions to answer and things to consider in preparation for the employee-supervisor conference. The following table gives an overview of the pre-conference planning process:

Employee's Role	Supervisor's Role
Ask: Where Have I Been?	Review performance appraisal
Ask: Where Am I Now?	Review performance standards
Ask: Where Can I Go?	Consider future possibilities for employee

The remainder of this section is divided into three major parts:

- Who is responsible for developing an IDP?,
- Employee's responsibilities and
- Supervisor's responsibilities.

### Who Is Responsible for Developing an IDP?

Both the training provider, supervisor/manager and the employee are responsible for developing an IDP. While the employee completes the IDP, with the cooperation and assistance of the supervisor, it is the supervisor who normally has to approve individual activities on the IDP. The supervisor is responsible for performance improvement, and the IDP process is an important tool to achieve that objective.

Developing an IDP is a collaborative effort. When the employee and supervisor systematically work through the steps in this guide, an important opportunity exists to:

- Discuss critical job requirements and responsibilities,
- Outline the knowledge and skills needed to perform the work,
- Identify an employee's talents and needs,
- Define individual job satisfaction and
- Improve both organizational and individual performance.

## Employee's Responsibilities

This pre-planning process should enable the employee to enter the employee-supervisor conference with some confidence and a firmer perspective on where he/she is going. It is helpful to remember that as an employee you have a two-fold role in developing your IDP.

**Initiator:** Assesses current skills and competencies, explores developing options, looks at the needs of the organization and sees realistic, constant improvement as a responsibility to oneself and the agency.

**Owner:** Assembles information, weighs alternatives, makes trade-offs, and proposes objectives and activities.

**Where Have I Been?** To determine where you have been, consider all previous training, development and job experiences. Include:

- On-the-job training
- Formal training
- Developmental assignments and
- Self-development activities.

**Where Am I Now?** To determine where you are now, read your present position description, performance elements, performance standards and past performance evaluations. Think about the work performed over the past year and develop these lists:

- I am good at these parts of my job: \_\_\_\_\_,
- In general, I am good at this kind of work: \_\_\_\_\_,
- These managerial or technical competencies are necessary to perform my current duties: \_\_\_\_\_,
- I need to develop or strengthen these competencies: \_\_\_\_\_ and
- I need these kinds of assignments or training to develop or strengthen these competencies: \_\_\_\_\_.

**Where Can I Go?** To determine where you can go, focus on these major areas:

- Positions in which you are interested
- Short-range goals and
- Long-range goals.

**Positions:** The following table will help you determine where you can go and how to focus on positions you are interested in.

Step	Employee's Action
1	Consider a range of options (such as, positions in your unit, other units, other) that might interest you.
2	To find out more about other unit positions, talk to the unit's supervisor or contact the HR or personnel office.
3	Based on this examination of options, decide on short-range goals (1-2 years) and long-range goals (2-5 years).

**Short-Range Goals (1-2 years):** The following table will help you establish short-range goals.

Step	Employee's Action
1	Identify the technical or managerial competencies needed to obtain your short-range goals.
2	Ask: <ul style="list-style-type: none"> <li>• How strong or weak am I in these competencies?</li> <li>• Is it possible for me to develop these competencies?</li> <li>• What kind of training or developmental activities will enable me to develop these competencies?</li> </ul>
3	Review short-range goals again to ensure that they are realistic and attainable.

**Long-Range Goals (2-5 years):** The following table will help you establish long-range goals.

Step	Employee's Action
1	Identify the technical or managerial competencies needed to obtain your long range goals.

2	<p>Ask:</p> <ul style="list-style-type: none"> <li>• How strong or weak am I in these competencies?</li> <li>• What kind of training or experience will enable me to develop these competencies?</li> <li>• How much?</li> <li>• How long will it take?</li> <li>• Are resources (such as funding and training opportunities) available for me to develop these competencies?</li> <li>• What contribution can I make to the organization?</li> </ul>
3	Review long-range goals to ensure that they are realistic and attainable.
4	Rank in priority all the technical or managerial competencies that need to be developed.

Now, the employee should be prepared for the employee-supervisor conference. The next block will describe the supervisor's preparations for the conference.

### Supervisor's Responsibilities

In preparing for the employee-supervisor conference, the supervisor should remember that he/she serves in the following roles :

**Consultant:** Provides insights about employee's skills and potential and suggests ways to develop these skills and where employee should focus efforts.

**Advisor:** Shares knowledge about the organization, personal career experiences and specific position required or recommended training.

**Planner:** Gives insight into the employee IDP and decides what is in the best interest of the work unit as a whole.

**Evaluator:** Determines if the investment in the training and developmental activities resulted in improved individual and work unit performance.

The supervisor should consider the following points concerning the employee's development in preparing for the employee-supervisor conference:

- The employee's current level of performance and
- Future possibilities for the employee.

Step	Supervisor's Action
1	Review the employee's current performance appraisal.
2	Ask: <ul style="list-style-type: none"> <li>• What are the employee's strengths with regard to managerial or technical competencies?</li> <li>• Is the employee lacking some technical and managerial competencies to perform well?</li> <li>• How can the employee attain these competencies?</li> <li>• Are there any other problems that may be affecting the employee's ability to meet the performance standards?</li> <li>• What program resources can be used to help the employee improve competency levels?</li> </ul>
3	Review the current performance standards used for the appraisal.
4	Ask: <ul style="list-style-type: none"> <li>○ Were the performance standards too stringent in any area?</li> <li>○ Were the performance standards too lenient in any area?</li> <li>○ Do the performance standards need to be updated or revised? If so, how?</li> </ul>
5	Consider the unit's and/or agency's

	<p>organizational needs and strategic priorities over the next few years, along with the employee's needs and goals.</p> <p>Ask:</p> <ul style="list-style-type: none"> <li>• What changes in mission, technology, programs or staff are expected?</li> <li>• Should the employee be developed for added responsibilities? If so, what kind? Where? How?</li> <li>• What kind of development will the employee need to reach the goals?</li> <li>• What resources can be assigned to support this IDP?</li> </ul>
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### Step 3 - Employee-Supervisor Conference

#### Purpose of the Employee-Supervisor Conference

The employee-supervisor conference provides the opportunity for open communication about all that has been considered during the pre-conference planning phase.

The employee and supervisor each have specific responsibilities to ensure that the conference is effective and objectives are met so that an IDP form can be prepared.

#### Employee's Responsibilities

The following table describes what the employee should review and discuss with their supervisor during the conference.

Step	Employee's Action
1	Review performance appraisal results.
2	<p>Ask:</p> <ul style="list-style-type: none"> <li>• Were the performance standards met? If not, why? If so, how?</li> <li>• What weaknesses were identified? Are technical or managerial competencies lacking? If yes, which? If not, is there any other problem affecting performance?</li> <li>• How can performance be improved?</li> </ul>

3	Review short- and long-range goals.
4	Ask: <ul style="list-style-type: none"> <li>• Are the goals realistic?</li> <li>• Discuss the unit's and/or organisation's goals, needs and priorities. To what extent do my individual goals mesh with those of the unit and/or organisation?</li> <li>• Are the goals attainable?</li> <li>• What is my level of commitment toward attaining the goals.</li> </ul>
5	Review current technical and/or managerial competencies.
6	Ask: <ul style="list-style-type: none"> <li>• What competencies do I have to meet my goals?</li> <li>• What competencies do I need to develop?</li> </ul>
7	Identify developmental needs by determining the difference between the competencies I currently have and those needed to meet my goals.
8	Rank developmental needs based on the unit's and/or organizational needs and priorities, as previously reviewed.
9	Discuss training and developmental activities to meet my needs.
10	Select developmental activities and training that will meet my needs. Consider a variety of developmental approaches and strategies, and listen to the supervisor's ideas. See Section D of this guide.

### Supervisor's Responsibilities

During the conference, the supervisor should:

- Provide feedback to the employee on everything discussed, striving for a two-way discussion,
- Be realistic and objective about which activities will best suit the needs of the employee, as well as the broader needs of the unit and/or organisation,
- Discuss in detail the optimum developmental activities that are possible and appropriate,
- Take time to prioritize the developmental activities with the employee and
- Identify criteria used to evaluate employee's development.

## Step 4 - Selecting Optimum Developmental Activities

### Introduction

The matching of identified developmental needs with available development activities (training and non-training) is a major step in the IDP process.

A major difficulty supervisors and employees encounter in matching needs with activities is that of selecting the optimum developmental activity, that is the activity that provides maximum learning within the boundaries of the organization's:

- Mission,
- Budget,
- Workload,
- Travel,
- Staffing and
- Time constraints.

To minimize this problem, a variety of developmental approaches and strategies should be considered. We often think of training only in terms of formal training courses. Actually there are four basic types of developmental experiences to consider in planning the IDP:

- On-the-job-training,
- Formal classroom training,
- Self-development and
- Developmental activities.

While all four types of experiences have their individual advantages and disadvantages, it is crucial to stress the importance of choosing the appropriate experience that most effectively and efficiently meets your specific needs. Although it would be ideal to incorporate a combination of all four types, the resources available to the supervisor may not make this possible. That is why an open discussion between the employee and supervisor concerning all options is necessary to pinpoint what is feasible for approval.

### On-the-Job-Training

Structured on-the-job-training is the most frequently used method of individualized learning. In this situation, the employee is counselled and coached while actually performing official duties. It usually involves individual instruction by the supervisor or a designated staff member because of his/her experience in the task or procedure to be learned. This approach can be used to teach employees new procedures, tasks and technology.

### **Formal Classroom Training**

Probably the most common experience is training in the classroom. This training may take place away from your work site. Depending on the objectives, specific program and instructor's approach, this experience can be very valuable. It may be the only alternative you have to acquire specific or specialized technical or managerial competency.

In many instances, however, formal classroom training is not the only way or the best way for an employee to learn. Therefore, it is suggested that no matter what the employee's needs are, consider this experience second to any training the employee can acquire at the work site.

### **Self-Development**

When an employee aspires to a new career and his/her developmental needs cannot be directly related to present or anticipated work assignments, or resources are not available, the employee may undertake self-development activities:

- Taking evening or weekend courses at local schools,
- Watching educational or training videotapes,
- Using correspondence and other self-study courses,
- Reading books and other publications or journals and
- Using PC tutorials or computer assisted training programs.

### **Developmental Activities**

One of the best ways to train for added responsibilities or higher job opportunities is through developmental activities. With the support and assistance of the supervisor, the employee's present job can be restructured or arrangements made to have the employee temporarily transferred to another area to learn firsthand the necessary technical and managerial competencies required for effective performance in that job. Examples of developmental activities include the following list:

**Shadowing:** Providing a trainee or learner with the opportunity to observe a well qualified, journeyman level employee perform a particular skill. Immediately after the shadowing period, the learner needs to have the opportunity to perform the same skill and be given feedback on that performance.

- **Detail/Rotational Assignments:** Short-term assignment particularly appropriate for important skills that make up a small portion of an individual's job, but can lead to full-time work in that field.
- **Task Force Assignments:** This is particularly effective if the learner has an opportunity to work with well qualified people who will provide feedback to the learner on his/her performance and participation in the group.

### Development of Job Aides

Requires that the learner develop a product that will assist in the performance of the job, while, at the same time, serving as a vehicle for learning job-related information.

- Cross-Program Assignments
- Special Work Projects
- Coaching Lower Level Employees

### Step 5 - Preparing The IDP Form

#### Introduction

The IDP form is simply a means of formally documenting your plan. Once the employee-supervisor conference has been held, the Individual Development Plan, may be completed.

#### Responsibilities

The following table describes the process of completing the IDP.

Step	Who	Responsibilities
1	Employee	Completes the IDP.
2	Employee and Supervisor	Discusses and agrees on contents of the form.
3	Supervisor	Ensures that the IDP is properly completed.
4	Employee and Supervisor	Signs the IDP.
5	Employee and Supervisor	Keeps a copy of the IDP.
6	Supervisor	Forwards a copy of the IDP to the Training Office.
7	Employee	Implements the IDP.

## Step 6 - Implementing The IDP

### Employee's Responsibilities

Completion of the IDP acknowledges the employee's commitment to accomplish the planned training and development. To implement the plan effectively, three actions are required on the employee's part:

- **Documentation:** Formal training and developmental activities that involve exchange of funds, official time or both must be documented.
- **Participation:** Once the request for training is approved, it is up to the employee to carry through with the experience.

The supervisor will support and guide the employee, but the primary responsibility for successfully reaching the goals rests with the employee. It will take time to reach your goals, but the long-term investment will be worth it.

- **Evaluation:** Just taking a course or being involved in a developmental assignment does not necessarily mean the employee has fully met his/her commitment. Training and development needs are identified primarily to enable one to perform with greater ease and efficiency on the job, thus helping the agency accomplish its mission. The crucial step is applying what is learned to the job and practicing it.

### Supervisor's Responsibilities

Supervisor should:

- Periodically reassess employee's plan,
- Meet with employee after each training and developmental activity and
- Make periodic written evaluations of how the training and development activities have affected the employee's performance.

### Reviewing or Revising an IDP

An IDP is a plan for development, not a contract in stone. IDP's should be reviewed, revised or both as follows:

- at progress reviews of the performance plans,
- upon completion of training and
- altered as performance plans and job assignments change.



## Activity 9: (SO2)

What is the purpose of an Individual Development Plan?

## Guide Support and Advice (SO3)

### The Suitability of the Support and Assistance

Before we talk about checking the suitability of the support and assistance that might be provided for a learner, it is important to note that the ability to learn is affected by a number of factors besides the planning of an effective learning intervention. Special needs may impede a learner's progress and this list highlights the range of special needs that might exist.

Special needs include:

- Physical
  - Sight impairment
  - Hearing impairment
  - Impairment of movement or motor skills
  - Impaired performance in writing, reading, spelling and numeracy ability
    - Personal
  - Substance abuse
  - Obvious emotional distress
  - Health problems

Various tests may need to be devised to quickly assess learners' special needs.

In order to check the suitability of the support and assistance provided in terms of the learners' needs a simple feedback tool can be designed. This tool can either be quantitative or qualitative in nature, depending on the type of feedback required. You have already gained some understanding and experience with these two approaches from your previous modules. You will now have the opportunity to practise using these skills.

### Appropriate Support Services

Whilst various support services exist, both within organisations and external to the organisations, such as career counselors, occupational therapists, social workers, learning support centers, community centers and when necessary the CCMA there are other complex needs which extend beyond these basic support services. For example, diversity is a serious and important consideration in the development and articulation of training and learning. If learners feel completely alienated from their learning experience this vacuum can have an impact on how they interact with other learners and the facilitation of learning.

### The needs of large diverse groups of learners

It is necessary to ascertain the relevant needs of diverse groups in a consultative and participatory manner. Tolerance of cultural perspectives and views can be extremely enriching and beneficial to the learning environment and learners' continued involvement with programmes. However, the facilitator should recognise and be sensitive to the intense inter-play between the various cultures and racial groups – the objective of the training should be to enable learners of various diverse groups to develop and nurture a climate of realistic and sustainable team work which gives space to and respects the views of all learners.

### Mentoring as an important support service

Whilst coaching is the process of assisting individuals achieve the required productivity level in the course of their day to day work activities and is usually carried out by a trainer or supervisor who has hands on experience of the job requirements, mentoring is quite different. Mentoring is a process of forming relationships between a more experienced, seasoned and wiser person and a less experienced individual. It is all about the relationship between the mentor and the mentee, which result in interpersonal interchanges of two individuals – for the mentor it is the opportunity to express their inner motivations to develop people and for the mentee it is the opportunity to have support, guidance, purpose and friendship while attaining professional competence.

In a mentor relationship the mentor and mentee:

- identify objectives, goals and developmental needs;
- define and establish a plan to establish the mentee's goals;
- discuss any problems/challenges that the mentee might be experiencing in attaining the goals; and
- meet regularly in person or via phone or email to review and evaluate progress.

To sum up consider the differences between coaching and mentoring as shown in the table below.

<b>Coaching and Mentoring: Key Differences</b>		
<b>Coaching</b>		<b>Mentoring</b>
<b>Key Goals</b>	To correct inappropriate behaviour, improve performance, and impart skills that the employee needs to accept new responsibilities.	To support and guide personal growth of the mentee.
<b>Initiative for Mentoring</b>	The coach directs the learning and instruction.	The mentored person is in charge of his or her learning.
<b>Volunteerism</b>	Though the subordinate's agreement to accept coaching is essential, it is not necessarily voluntary.	Both mentor and mentee participate as volunteers.
<b>Focus</b>	Immediate problems and learning	Long-term personal career development.

	opportunities.	
<b>Roles</b>	Heavy on telling with appropriate feedback.	Heavy on listening, providing a role model, and making suggestions and connections,
<b>Duration</b>	Usually concentrates on short-term needs. Administered intermittently on an 'as-needed' basis.	Long-term.
<b>Relationship</b>	The coach is the coachee's boss.	The mentor is seldom the mentee's boss. Most experts insist that the mentor not be in the other person's chain of command.

**Adapted from Coaching and Mentoring: How to Develop Top Talent and Achieve Stronger Performance, 2004)**

## Counseling

Counseling is a process that enables learners to sort out issues and reach decisions affecting their lives and careers. It is most often required when a learner is at a juncture of change or crisis and requires help. Counseling will involve talking with the learner in need in a way that assists that learner to solve his/her problem(s). The process should help to create conditions that will cause this learner to understand and improve the circumstances, behaviour, character, values or life circumstances.

Counseling is a special relationship built on confidentiality, mutual respect and open communication, with the intention of helping learners to clarify and identify their problems and to find their own solutions. It is about empowering the learner to make their own decisions; it is not advice giving or offering sympathy. The counselor is **unbiased** and there to offer support and strength during emotional times. Many people may use counseling skills as part of their work, but the counseling relationship is quite different, as it entails commitment and clear boundaries.

Counseling is best achieved face-to-face in confidential sessions between the counselor and learner, however, other forms of contact may be adopted such as via telephone or writing. A learner in need usually finds counseling a very liberating and empowering experience, however, this process generally takes time depending on the nature and number of problems that need to be worked through.

Some organisations have a separate counseling unit, i.e. **the dti** has a Quality of Life Unit, which provides specialised support beyond what can be delivered by line managers, trainers and HR practitioners.

## Interpersonal Relationships in Counseling

Human beings have a powerful need for connectedness or, as Baumeister and Leary (1995) have stated, "a fundamental human motivation" for regular, positive interactions within an ongoing relational connection.

An interpersonal relationship is a relatively long-term association between two or more people. This association may be based on emotions like love and liking, regular business interactions, or some other type of social commitment. Interpersonal relationships take place in a great variety of contexts, such as school, university, family, friends, marriage, acquaintances, work, clubs, neighborhoods, and churches.

We define types of interpersonal relationships in terms of relational contexts of interaction and the types of expectations that communicators have of one another.

### Friendship

Theories of friendship emphasize the concept of friendship as a freely chosen association

### Family

Family communication patterns establish roles, identities and enable the growth of individuals. Family dysfunction may also be exhibited by communication patterns.

### Romantic

Romantic relationships are defined in terms of the concepts of passion, intimacy and commitment.

### Professional Relationships

Professional communication encompasses small group communication and interviewing.

Taking into account the different types of relationships it is important that the counselor takes great care that the following is implemented when engaging into a counselor / student relationship.

Trust versus Credibility
<ul style="list-style-type: none"> <li>• <b>Credibility</b> is intellectual</li> <li>• <b>Trust</b> is visceral</li> </ul>
Building Trust: Behavioral Attributes <sup>4</sup>
<ul style="list-style-type: none"> <li>• sharing important information, especially about oneself</li> <li>• willingness to be influenced</li> <li>• avoiding the abuse of the other person's vulnerability (because of their inadequate access to information or lack of positional power, and so on)</li> <li>• being fair</li> <li>• fulfilling promises</li> </ul>

### **Trust Defined**

Mutual trust is a shared belief that you can depend on each other to achieve a common purpose.

More comprehensively trust defined as "the willingness of a party (learner) to be vulnerable to the actions of another party (counselor) based on the expectation that the counselor will perform an action important to the learner, regardless of the counselors ability to monitor or control the learner."

"People sense how you feel about them. If you want to change their attitudes toward you, change the negative attitudes you have toward them." Building relationships requires the building of trust. Trust is the expectancy of people that they can rely on your word. It is built through integrity and consistency in relationships.

### **Effective Listening: The Bottom Line of Trust**

If you listen well, people will trust you. "You cannot establish trust if you cannot listen. A conversation is a relationship. Both speaker and listener play a part, each influencing the other. Instead of being a passive recipient, the listener has as much to do in shaping the conversation as the speaker"

### **Managing Cultural Differences**

Cultural differences play a key role in the creation of trust, since trust is built in different ways, and means different things in different cultures.

### **Empathy**

Empathy is valued currency. It allows us to create bonds of trust, it gives us insights into what others may be feeling or thinking; it helps us understand how or why others are reacting to situations, it sharpens our "people acumen" and informs our decisions.

**Factors that positively impact on Interpersonal Relationships are:-**

**Purpose:** Create a purpose for your relationship that can empower both parties.

**Clarity in agreements, expectations, values and roles:** Don't assume that you know you're the other person's thoughts, feelings, or desires.

**Responsibility:** Always remember that it is each and every body's own responsibility to be happy. You can't force happiness upon another – nor can you make another person feel like you think they should feel. The counselor is there to facilitate the learner to make a decision not to make a decision for them or to give them the answers to their life.

**Trust:** Trust is an important part of all interrelationships.

**Support:** Make your relationship about supporting the learner.

**OTHER TIPS FOR INTERPERSONAL RELATIONSHIP SUCCESS**

1. Be honest at all times.
2. Communicate openly
3. Keep communicating until the problem is successfully resolved. (Do not give up!)
4. Deal with problems when they first begin to emerge.
5. Always insist on win-win solutions.
6. Encourage healthy growth and change.

**Factors that negatively impact on Interpersonal relationships are:-**

- Abuse
- Defensiveness
- Criticism
- Right most of the time
- Selfishness
- Dishonesty
- Superiority Complex
- Controlling
- Doubting

## Focus on your Learner

Analysis – who are they? How many will be there?

Understanding – what is their past experiences?

Demographics – what is their age, gender, background?

Interest – why are they there? Who asked them to be there?

Environment – where will the session be? What method are we going to use for this session?

Needs – what are their needs? What are your needs as a counselor?

Customised – what specific needs do you need to address?

Expectations – what do they expect to hear from you? What do you expect your learners to say?

## Body Language

Think of the messages that your non-verbal expressions transmit each time interact with people. Try to alter your body language so that you may look professional and enjoy serving your learners.

### Positive messages

### Negative messages

<p><b>1. Face is relaxed and under control:</b> This communicates that you are prepared, know what you are doing and you are comfortable with your role.</p>	<p><b>1. Face is anxious and uptight:</b> This communicates that you are ill- prepared, inexperienced and uncomfortable with your role.</p>
<p><b>2. Smile is natural and comfortable:</b> This communicates that you are sure of yourself, like what you are doing and enjoy serving your learners.</p>	<p><b>2. Smile is missing or forced:</b> This communicates that you are unsure of yourself, do not like what you are doing.</p>
<p><b>3. Eye contact is maintained when talking and listening to learners:</b> This communicates that learners are important to you; you are interested in them and are self confident.</p>	<p><b>3. Eye contact is avoided when talking and listening to learners:</b> This communicates a lack of interest in the learner, and that you lack the self confidence to do the job.</p>
<p><b>4. Body movement is relaxed, yet deliberate and controlled:</b> This communicates that you are in control, you are glad to be where you are and that although you are busy, that is just part of the job.</p>	<p><b>4. Body movement is hurried or rushed:</b> This communicates that you are not in control of the situation, and would really like the guests to leave.</p>

## Principles of effective feedback

- ◇ Be descriptive rather than evaluative
- ◇ Be specific
- ◇ Solicit feedback rather than giving it
- ◇ Time feedback so that it happens as soon as possible after a specific situation
- ◇ Focus on what can be described
- ◇ Demonstrate caring in your feedback
- ◇ Do not get emotional or use emotional language

The **5-step feedback process** can be used if the issues of the learner are not being resolved:



Step 1: Ask permission to provide feedback



Step 2: Describe specifically what you are observing



Step 3: Tell the learner about the direct impact of their actions



Step 4: Give people an opportunity to explain



Step 5: Draw out ideas from the learner



### Activity 10: (SO3)

Discuss the stages of feedback.

## Impact of Values and Attitudes

Do you have a positive attitude?

1 = always

2 = usually

3 = seldom

4 = never

1. When I see a problem in my life, I am usually able to pinpoint it, and to start thinking about solutions. I have a sense of being in control of my life and of being in charge of the things I do.

1                      2                      3                      4

2. I feel that I know myself, and I can think of many things that I value, or like about myself.

1                      2                      3                      4

3. I think that I understand my weak points: I am working on some areas that I can improve. I am also understanding and accepting things about myself that I can't change. I am unafraid of my limitations.

1                      2                      3                      4

4. I find a lot of pleasure in my life, in people, in my work and in my world, although I can say "no" to some good times or indulgences if they seem inappropriate.

1                      2                      3                      4

5. I do my own thinking, and I can come to conclusions and make decisions. I feel I am becoming quite a confident person.

1                      2                      3                      4

6. When a situation or relationship is not working out for me, I believe that I can rearrange, or re-negotiate it to suit me better, or I can walk away from it if it is damaging me. I don't just feel helpless and trapped.

1                      2                      3                      4

7. I have a positive outlook on life and I trust myself. When things are going well, I don't get anxious and start worrying that the good times can't last, or waiting for something to go wrong.

1                      2                      3                      4

8. I am usually able to be honest about what I think and how I feel. I don't usually pretend to feel differently from the way I really am feeling.

1                      2                      3                      4

9. I usually know what I want, and what I am capable of getting, and how I can reach my goals. I often have a clear plan or even a timetable for achieving them. I find that I take small steps towards achieving my goals - rather than just wishing I had achieved them.

1                      2                      3                      4

10. I don't spend a lot of time wishing that the past was different, or wishing that something would happen to improve my life now. I live in the present - but plan for the future.

1                      2                      3                      4

11. I feel that I have a number of good, affectionate relationships. I get support and encouragement from my family and friends, and I don't suffer from feelings that everyone is against me.

1                      2                      3                      4

12. When I've had a setback, or a failure, I soon start to go forward again. I "bounce back" ... I'm actually quite a resilient person.

1                      2                      3                      4

13. I am quite good at taking responsibility for my own life, and letting other people take responsibility for theirs. I seldom get entangled in other people's problems when I don't want to, and I don't blame them for my shortcomings or mistakes.

1                      2                      3                      4

14. I care about the world, and about my community, family and friends. I am prepared to contribute to making the world a better place.

1                      2                      3                      4

15. I am becoming comfortable with myself. I am developing into the kind of person I want to be. I would not want to be someone else.

1                      2                      3                      4

### Self-Awareness of Personal Values, Beliefs, Attitudes and Fears

We are all influenced by the society and culture within which we live, develop and mature. Society and culture contribute to the development of personal values, beliefs, attitudes and fears. An important part of being a counselor is having a good self-awareness of our own values, beliefs, attitudes and fears.

#### As a counselor we need to:

- Develop our own self-awareness of our values, beliefs, attitudes and fears.
- Assist learners to develop their own self-awareness of their values, beliefs, attitudes and fears.
- Understand that people hold different values.
- Understand that people come from different cultures, races, religions, etc.
- Appreciate the need to respect learners irrespective of their culture, race, religion, etc
- Address or modify attitudes that may negatively impact on the counseling situation.

#### Developing self-awareness is important because values, beliefs, attitudes and fears:

- Guide day-to-day behaviour.
- Influence our interpretation, explanation and response to events.
- Are usually specific to the culture in which they evolved.
- Vary between and within countries, regions and groups.

As a counselor, our values, beliefs, attitudes and fears can influence how we counsel people e.g. what topics we prefer to discuss, what topics we are uncomfortable about, what learners we may experience difficulties with, how we respond to challenging behaviours and our interactions with learners from different values, beliefs, attitudes and fears from our own.

Good counselors do not allow their own values, beliefs, attitudes and fears to influence the counseling process.

Can we change values, beliefs, attitudes and fears in our counseling? Not usually, but we can raise awareness. We can also clarify and challenge false premises on which they may be based. Further, we can explore strategies for managing how they may influence our professional roles and responsible.

Difficulties and conflicts in counselor - client values, beliefs, attitudes and fears should be addressed through supervision, consultation with experienced counselors, and if necessary, referral to an appropriate external professional.

### Questions to raise self-awareness

Consider each of the following questions to begin highlighting some of your personal values, beliefs, attitudes and fears around being a counselor. Reflect on how your values, beliefs, attitudes and fears may influence your behaviour and may influence your communication with learners in relation to factual and sensible knowledge.

1. What do I think about being a counselor?
2. Am I afraid of being a counselor?
3. What specifically am I afraid of?
4. What importance do I place on people attending counseling?
5. What are my expectations of learners who attend a counseling session?
6. What everyday slang words do I use, or never use, to explain certain factors, especially to learners who differ from me radically, culturally or sexually, or are much younger or older than me?
7. Will I accept a client's view if it is different from my own, or will I always try to be in control?
8. Will I be judgmental of learners whose values, beliefs, attitudes and fears are different from mine?
9. How much do I want to influence, control or dominate learners?
10. Are there some kinds of people that I probably could not counsel?
11. What disruptive behaviours will I find most difficult to manage in a counseling situation?

### Possible effects of values, beliefs, attitudes and fears on communication and counseling

- people generally interpret messages in ways which make them feel comfortable and secure.
- When people's attitudes are attacked head-on, they are likely to defend those attitudes, and in the process reinforce them.
- People pay most attention to messages that are relevant to their own circumstances and point of view.
- People who feel insecure in a relationship are unlikely to be good listeners.
- People are more likely to change in response to a combination of new experience and communication than in response to communication alone.
- The message in what is said will be interpreted in the light of how, when, where and by whom it is said.
- Lack of self-knowledge and an unwillingness to resolve our own internal conflicts make it harder for us to communicate with other people.

**Value clarification exercise and activities – Guidelines for addressing the possible effects of values, beliefs, attitudes and fears.**

- Start with an ice breaker or a group introduction exercise.
- Create a supportive environment
- Build rapport with the learners
- The right of confidentiality must be made explicit. It is important to maintain confidentiality at all times, especially if learners refer to their own personal experiences.
- Counselors must be at ease with their own values, beliefs, attitudes and fears.
- Be encouraged to respect individual differences. Learners frequently come from different ethnic and cultural backgrounds and have different, lifestyles, beliefs, personal experience and areas of interest and expertise.
- Listen carefully and with empathy, and to respect each other's contributions, opinions, and experiences. Explain that it is important in the training, and as professionals, to practice active listening by allowing each other to share their own experiences and opinions with the group.
- Don't attack learners embarrass them or make them feel that they have unusual views or punish them for holding different views.
- Don't allow other members of the group attack or punish individuals who hold different views.
- Listen to the group. People are more likely to listen to us if we listen to them.
- People often feel more comfortable doing value clarification exercises working in pairs or in groups than disclosing to a whole room.
- The counselor should ensure that their background knowledge of the subject is sufficient to challenge inappropriate attitudes with confidence.



**Activity 11: (SO3)**

Devise a step by step checklist for a counselling session you would hold with learners.

## Maintain Records of Assistance and Support (SO4)

Each organisation will have its own way of retaining records dependent on the type of business being carried out. In some cases, records will be paper bound and all documents will be maintained in physical files, whereas in other cases records will be maintained electronically and the environment will be relatively paperless. Whichever approach is taken, records form an important resource for the following reasons:

- To comply with legislation (certain records must be retained for a certain period of time)
- To inform decision making
- For reference purposes

In this session we are going to focus on a progress report.

## Maintaining Confidentiality

Confidentiality has been defined by the International Organisation for Standardisation (ISO) as “ensuring that information is accessible only to those authorised to have access”. This is one of the cornerstones of information security. In ethics and in law, some types of communication between a person and a professional (e.g. medical) are “privileged” and may not be discussed or divulged to third parties. The principle applied when designing access levels is the classical military “need-to-know” principle.

When records are maintained electronically a secure computing platform is designed so that employees can only access and perform actions that have been allowed. However, with manual records a secure area is required (lock up cabinets or safe rooms).

Each organisation will have its own way of retaining records dependent on the type of business being carried out. In some cases, records will be paper bound and all documents will be maintained in physical files, whereas in other cases records will be maintained electronically and the environment will be relatively paperless. Whichever approach is taken, records form an important resource for the following reasons:

- To comply with legislation (certain records must be retained for a certain period of time)
- To inform decision making
- For reference purposes

In this session we are going to focus on a progress report.

In order to maintain records within an organisation a policy document should be drawn up which:

- creates a framework for action within the organisation;
- ensures consistency in terms of quality;
- reinforces a decision taken;
- is a written product;
- is communicated throughout the organisation; and
- forms part of a wider framework of policy documents within the organisation.

(Note: a policy is what has to be done, whereas a procedure is how to carry out the policy in practice)

Let us assume that your organisation (or the one with which you have been contracted to work) does not have a policy in place regarding learner progress reports and no procedure exists to explain how to maintain these reports.



### Activity 12: (SO3)

Why is maintaining confidentiality important?

## Evaluate and Review Support Services (SO5)

SWOT is an acronym for Strengths, Weaknesses, Opportunities and Threats. A SWOT analysis is a strategic tool for helping a business clarify its position and decide where to concentrate its future efforts. This type of analysis is frequently used in relation to marketing strategy. However, it is a highly adaptable and flexible tool which, with training, can be used to bring insight to any situation--even an individual's own behavior. In this case we will be using a SWOT analysis to review our efforts in advising and supporting learners as an organisation.

### Relevant Focus

The greatest amount of insight is gained if the organisation and learner is able to relate the SWOT analysis to review the effectiveness of a support system. If one finds some information is missing or lacking detail, the SWOT analysis can act as a prompt to help him find out more.

### Strengths and Weaknesses

The initial task is to identify the strengths and weaknesses relating to the situation overall. Weaknesses may include inadequate support, counselling, mentoring, training, resources and poor feedback.

Learners should be encouraged to identify factors which relate closely to their particular business rather than those which are characteristic of their industry as a whole.

**Opportunities and Threats**

Opportunities refer to all those prospective activities and avenues the company might pursue in order to improve its position with regards to supporting learners. These usually tend to relate to those which are easily and quickly accessible and current or forthcoming. Threats may relate to such factors as the activities of the training provider, changes at the workplace, economic recession or the threat of high staff turnover.

**Order of Importance**

Once a number of key factors have been identified under these headings, you need to evaluate the significance of each and rank them in order of importance. At this stage, if feasible, it can be useful to hold a discussion about which factors have been chosen and why they are considered important. If this is not possible it is useful to write down this information in some detail.

**Action Plan**

This list of factors can then be used as the basis of an action plan--the real purpose of undertaking a SWOT analysis. The action plan should be designed to build upon strengths and reduce weaknesses. It should also aim to use those strengths to take advantage of opportunities, thereby preventing or reducing the potential impact of some or all of the threats it may be facing.

## Key SWOT Questions

### STRENGTHS

- What do we do exceptionally well?
- What advantages do we have?
- What valuable assets and resources do we have?
- What do members/customers identify as our strengths?

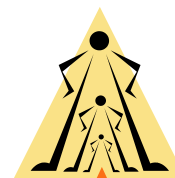


### WEAKNESSES

- What could we do better?
- What are we criticized for or receive complaints about?
- Where are we vulnerable?

### OPPORTUNITIES

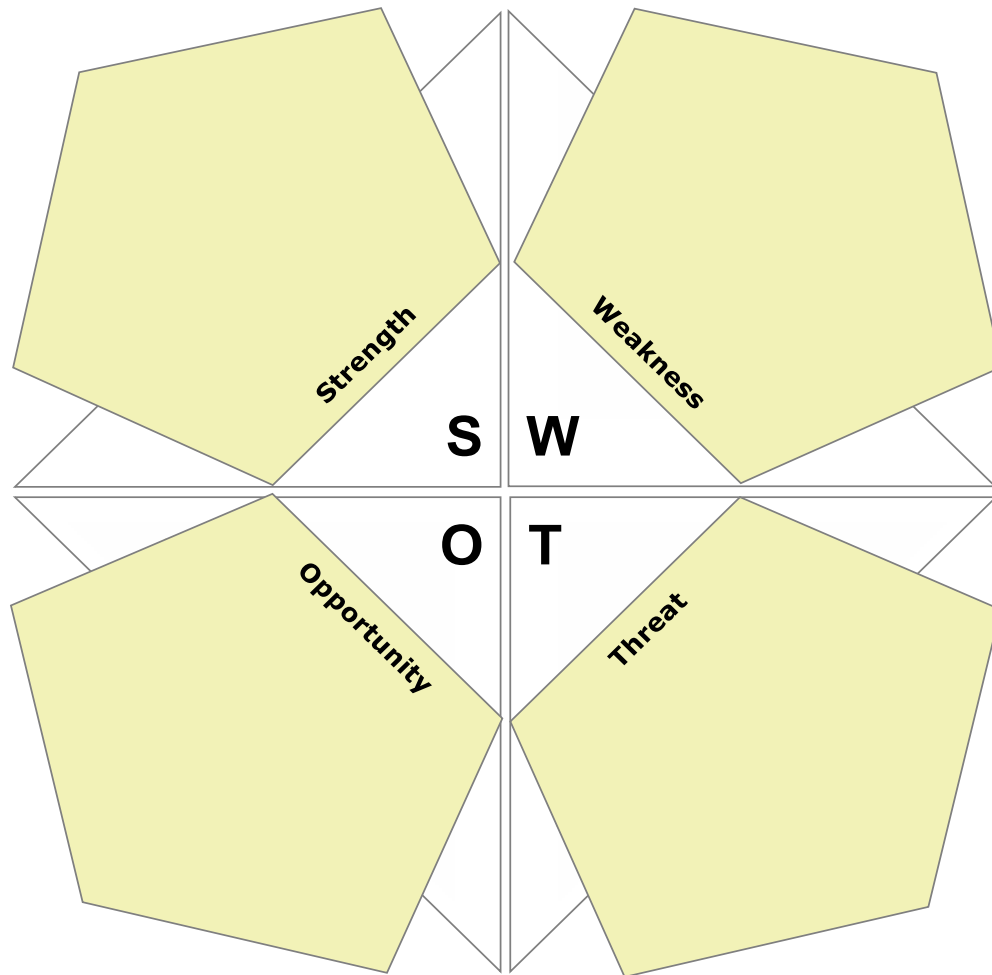
- What opportunities do we know about, but have not addressed?
- Are there emerging trends on which we can capitalize?



### THREATS

- Are weaknesses likely to make us critically vulnerable?
- What external roadblocks exist that block our progress?
- Is there significant change coming in our members' sector?
- Are economic conditions affecting our financial viability?

Consider your organisations learner support system. Now conduct a SWOT analysis.



## Compiling a Report on Findings

It is necessary for you to communicate your findings to the stakeholders in education, training and development.

Your stakeholders in a support system to learners will include:

- The learner/employee
- The organisation
- The manager / supervisor of the department
- The Training Provider
- The SETA

Your report should incorporate all the Strengths, Weaknesses, Opportunities and Threats towards the current support system with recommendations as how to strengthen the current support within the organisation.

Here are some questions you can consider when compiling your report.

- Are you able to identify your ability to support learners
- What resources do you have available to support learners
- Do you keep record of all coaching, training and mentoring sessions
- Are you able to identify your learners' study skills
- What methods do you have available for helping learners to self-assess and peer-assess their different learning skills
- Are you able to identify learning styles and strategies
- What methods do you use to improve awareness of the types and kinds of study skills
- Are you using suitable methods and techniques for different skills development
- Does your organization create a positive and supportive environment
- What steps do you take when reviewing your support system

### Report Outline

#### Step 1: Summary

Present a summary of the overall current process of supporting learners. Then present an overall summary of findings.

#### Step 2: Profile of the learner

Provide a profile of the typical learner within the organization. Identify the programmes that are completed by the learners within the organization.

#### Step 3: Resources

Identify the current resources used within the organization to support learners to ensure transference of learning.

#### **Step 4: Recommendations**

Provide recommendations to enhance the support system within the organization. A strategic plan can be inserted here.

#### **Step 5: Benefit**

It is important to include the benefit to the organization to enhance the support system within the organization. As training and development is costly and it is important to ensure that training and development is an investment for the organization. A support system will enhance the ability of the employee to transfer knowledge to the workplace. A return on investment should be utilized to its full extent.

### **Feedback**

The next step will be to provide feedback to the relevant stakeholders with regards to your analysis. It is important to know that the feedback that you give is constructive and is targeted to all stakeholders. If nobody's knows how will they be able to provide the necessary support to ensure return on investment.

This can be done through any of the following methods:

- Providing a report to management
- Meeting with employees
- Meeting with Management
- Meeting with the training providers
- Meeting with SETA
- Presentation to Management / SETA



#### **Activity 13: (SO5)**

Discuss the procedure you need to follow in compiling a report on evaluation and review of support systems.

## Self Assessment



Self Assessment:

You have come to the end of this chapter – please take the time to review what you have learnt to date, and conduct a self assessment against the learning outcomes of this module by following the instructions below:

Rate your understanding of each of the outcomes listed below:

Keys: ✖ - no understanding

● - Some idea

✓ - Completely comfortable

NO	OUTCOME	SELF RATING		
		✖	●	✓
1	Diagnose and make recommendations concerning learner problems in relation to learning and assessment			
2	Identify and analyse learner needs			
3	Counsel learners concerning problems in relation to learning and assessment			
4	Advise learners concerning their learning and development			
5	Prepare and review an individual development plan;			
6	Provide guidance to learners;			
7	Maintain records of learner issues, records and guidance provided			
8	Evaluate services provided.			



### Portfolio Activity:

Please refer to your workbooks and complete all the questions and assignments to be submitted as your portfolio activity on module 2. Also include all activities that was completed during your study of module 2.