

Wholesale & Retail

LEADERSHIP CHAIR



Cape Peninsula
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to a world of opportunities."*

Project 2015/16

**Towards Effective
Work-Integrated
Learning in the South
African Retail
SMME Sector**

31 July 2015

APPLIED RESEARCH
LEADERSHIP DEVELOPMENT
SERVICE TO RETAIL COMMUNITY

Project 2015/16

Towards Effective Work-Integrated Learning in the South African retail SMME sector

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ISBN : 978-0-620-66911-5

This report is available online at: www.wrlc.org.za

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EXECUTIVE SUMMARY

The rationale for this position paper on the effectiveness of student Work-Integrated Learning (WIL) within the retail sector Small, Medium and Micro Enterprises (SMMEs) arose from Wholesale and Retail Sector Education and Training Authority (W&RSETA) stakeholder observations that national socio-economic development strategies are not achieving the inclusive vocational learning and entrepreneurial skills goals required in this significant business sector.

The qualitative and quantitative methodology used for this formative evaluation included international and South African WIL literature reviews, augmented by dialogic interviews with and questionnaire surveys of purposive samples of relevant role players. These included tertiary vocational education staff (11) and students (75), SMME retailers and associations (20), as well as comparative workplace talent development insights from large retail corporates (7) and independent skills development facilitators (8).

The literature insights and survey findings conclude that for WIL in SMMEs to succeed, economic sustainability and entrepreneurial management skills need to be strengthened, supported by collaborative WIL processes and effective workplace mentorship strategies.

Recommendations are made for promoting progress towards work-integrated learning with SMMEs, for systemic review and consideration by W&RSETA executive management, vocational education thought-leaders and regional SMME co-operatives .

KEYWORDS

Work-integrated learning, co-operative education, work-based learning, graduate employability, mentoring, small, medium and micro enterprises, retail co-operatives.

CHAPTER 1

INTRODUCTION AND CONTEXT

1.1 Research Objectives

Available data indicates that most retail business Work-Integrated Learning (WIL) activities of South African Universities of Technology (UoT) and Technical and Vocational Education and Training (TVET) colleges involve mainly the large corporates in the sector. This implies that small, medium and micro- enterprises (SMMEs) are not participating significantly in retail student workplace internship programmes. It has been suggested that retail SMMEs could make a significant contribution to student WIL opportunities; and that students undertaking their experiential learning in retail SMMEs could contribute towards their effective operation and sustainability. This position paper evaluates:

- Findings from case studies on WIL with SMMEs in the literature
- Current involvement of retail SMME business in student WIL; and actions undertaken by UoTs and TVET colleges, to promote WIL with SMMEs.
- Perspectives of retail SMMEs towards participating in WIL, including perceived benefits, incentives, constraints and problems.
- Attitudes of business students towards doing their WIL phases in retail SMMEs.
- Attitudes of university and college staff towards promoting WIL in retail SMMEs.

1.2 Purpose and Scope

The purpose of this paper is to evaluate current WIL policies and practices in South African retail vocational education and workplace skills development, with the investigative focus on the effectiveness of retail WIL within SMMEs. Within the strategies of the National Development Plan and the policy objectives of the Department of Higher Education and Training and the Wholesale & Retail Sector Education and Training Authority (W&RSETA), the paper adopts a utilisation-focused evaluation approach (Patton 2008), which seeks to:

- Address the above WIL research objectives;
- Identify developmental actions by roleplayers, towards the achievement of conditions necessary for retail SMMEs to participate effectively in WIL programmes; and
- Recommend W&RSETA, DHET and other stakeholder interventions for enhanced participation of retail SMMEs in effective WIL activities.

1.3 Research Methodology

The qualitative and quantitative methodology choices (Coll and Chapman 2000) used in developing this paper on the effectiveness of retail SMME participation in student Work-Integrated Learning encompassed:

- A literature review, covering Work-Integrated Learning case studies, policies and practices from international and South African sources;
- A questionnaire completed by a convenience sample of 75 retail students, supplemented by dialogic interviews with purposive samples of 20 retail SMME managers and trade association leaders; 11 education and placement staff and 15 retail learning management practitioners, profiling their perspectives and attitudes regarding effective WIL with retail SMMEs;
- Participation in W&RSETA fora and vocational learning events, including an African Society for Talent Development conference; a W&RSETA SMME associations forum; and a Department of Higher Education and Training / National Skills Authority WIL Workshop, convened as a stakeholder platform to review current policies and processes in post-school co-operative education and workplace learning; and
- A focus group of W&RSETA and SMME management, retail vocational education and skills development stakeholders, to critique the draft position paper and assess the validity and utility of the research.

CHAPTER 2

LITERATURE REVIEW:

WORK-INTEGRATED LEARNING PARADIGMS

2.1 Perspectives of Work-Integrated Learning in the literature

An international literature review indicates varied approaches to what has become known as 'Work-Integrated Learning' (WIL), 'Co-operative Education' or 'Experiential Learning'. The value of WIL for students' vocational skills development and employability is widely accepted by employers (e.g. Confederation of British Industry 2014) and the higher education sector (Hodges and Burchell 2003; Hancock 2004; Haddara and Skanes 2007; Engel-Hills, Garraway, Jacobs, Volbrecht and Winberg 2008). The last-mentioned WILRU paper responds to the WIL guidelines in the Higher Education Qualifications Framework, promulgated by the South African Department of Education in 2007.

Work-Integrated Learning is typically defined as "career-focussed learning which integrates theoretical knowledge with workplace practical application, within a vocationally designed curriculum" (Patrick *et al* 2008). There are many professional challenges in planning and implementing WIL, including effective alignment and co-ordination between the various stakeholders, unrealistic expectations and competing demands (Engeström 2001; Bates, Bates and Bates 2007; Lester and Costley 2010).

Effective WIL can play a significant role in the readiness of graduates to contribute to the world of work (Coll and Chapman 2000; Ellinger *et al* 2010). Universities and Technical and Vocational Education and Training (TVET) Colleges are expected to offer relevant vocational education which enables students to engage with the world of work, within the National Development Plan (Republic of South Africa 2012) strategies of inclusive socio-economic development and job creation.

2.1.1 Learning Management Practices: Knowledge and Workplace Skills

"Learning is becoming increasingly integrated into a person's work life", argues Berryman (1993); although "teaching and learning in the classroom are often not readily integrated with workplace practice" (Cochran-Smith and Lythe 1999); hence the emphasis which Cross (2007) and Harris (2012) place on an integrated learning management approach, based on "Modern Workplace Learning, embracing all the ways we learn at work" (Hart 2015), as illustrated in Figure 2.1. Essential for promoting effective learning within this 7 Ps paradigm are personal motivation, positive mentoring and performance feedback (Paisley 2015).

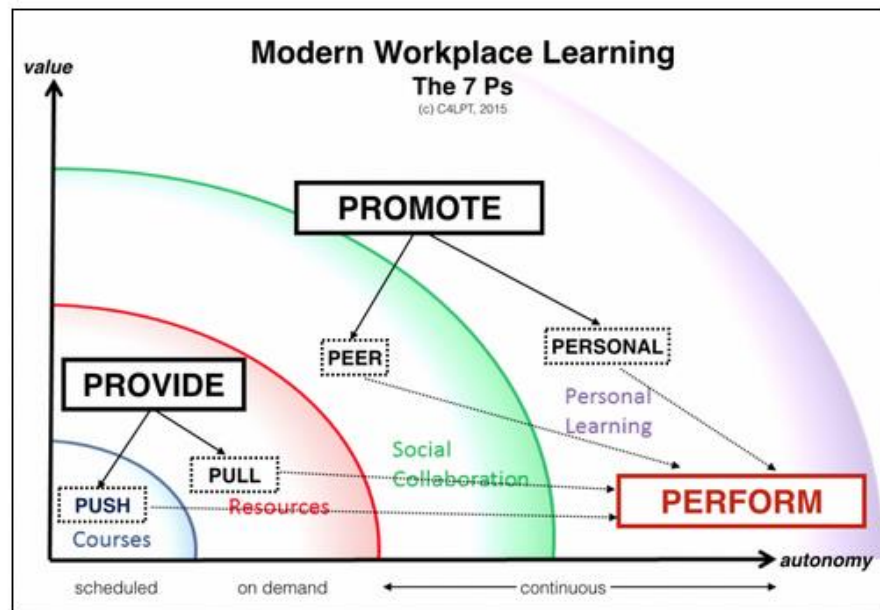


Figure 2.1: Modern Workplace Learning: The 7 Ps Source: Hart 2015

2.1.2 Employability through workplace learning: barriers and best practices

In widely different vocational and cultural contexts, Chickering and Gamson (1999), Eraut (2004), Ross (2007), Kramer and Usher (2011), White and Di Silvestro (Eds 2013), Jackson (2014), and Manuti *et al* (2015) review research relating to WIL and career education barriers and best practices. This body of research underscores the importance of achieving student ‘eagerness to learn at work’ and ‘employability skills development’, through integrated management of formal and experiential learning in relevant workplace settings.

2.1.3 Employer Engagement and Mentorship in Workplace Learning

In a stratified study of 4500 businesses, commissioned by the Australian Workforce and Productivity Agency (PhillipsKPA 2014), the findings from 264 employer responses reflected on factors which influence the engagement (or lack thereof) of businesses in authentic WIL processes; and the consequent outcomes. Findings of that seminal study conclude that:

- Almost half of the organisations surveyed were not familiar with the concept of WIL.
- Employers participated in WIL after having been approached by a college, university or student. Of the 264 employer responses, only 30 had taken the initiative in approaching an educational institution.
- Organisations most likely to be active in WIL experiences are those which have been in operation for at least 20 years; and have more than 15 full-time employees.

2.2 Conceptual Models to Optimise Work-Integrated Learning

Several WIL models have emerged in recent years, based on learning management systems fieldwork and findings. Of particular relevance to the current study are papers by Blackmur (2004), Ashton and Morton (2004), Martin and Hughes (2009), SHRM Foundation (2012), Harris (2012), Barkhuizen and Schutte (2014), Shellman (2014) and Roth (2015), all of which highlight the drivers of effective WIL strategies within a qualifications framework, namely: shared stakeholder expectations, talent development co-ordination between academics, students, employers and education regulatory agencies.

A paradigm of integration of lecture-room and workplace competence development was formulated by the Education Development Center in Massachusetts, described by Lombardo and Eichenger (2010). Their '*70:20:10 Learning Framework*' paradigm posits that "effective workplace learning derives from a well-integrated framework of:

- 70 percent Experiential Learning: through structured tasks, challenges and practice,
- 20 percent Social Learning: through interaction with work colleagues; and
- 10 percent Formal Learning: through structured knowledge courses and inputs".

2.3 Small Business WIL and Performance: 'Gold Mine or Land Mine?'

Cautionary perspectives on the theories of workplace experiential learning within a small business context are sounded by Lechner and Gudmundsson (2012); echoing McElyea and Van Tiem (2008), in their studies of the opportunities and problems of WIL and performance improvement interventions within small businesses in the United States.

They point out that 90 % of all companies in the USA are small businesses, with fewer than 100 employees; yet little has been written about how WIL and performance mentoring processes can be sustainably implemented in these small enterprises. Both studies underscore the need to follow professional learning practices within an SMME business, always in close collaboration with the enterprise owner/manager; and to ensure a systemic view of designing and implementing workplace learning projects – despite the apparent simplicity of the small business systems.

2.4 WIL Policies and Strategies in South Africa

The pedagogical concepts and challenges of work-integrated learning, co-operative education, or experiential learning, are familiar to South African vocational education practitioners (Engel-Hills, Garraway, Jacobs, Volbrecht and Winberg 2008; Groenewald 2009; Taylor and Govender 2013; Ramphele 2015; Rozyn 2015; Naidoo 2015; Cerff 2015); and are used in many organisational learning management and mentoring systems, including those of retail corporates. (Akoojee, Gewer and McGrath 2005; McMullen 2015, Snyman 2015, Nel 2015, Pillay 2015, Paisley 2015, Blake 2015; Koen 2015; Bailey 2015).

In the post-1994 governance dispensation, the career-focused, vocational higher and further education institutions defined the need to provide skilled learners who could “hit the ground running, when they entered the world of work” (Du Pre 2009). Their combinations of vocational knowledge curricula, coupled with experiential learning, have provided most of South Africa’s middle level vocational skills in the past two decades; and have intensified the delivery of learners and graduates with relevant workplace knowledge and skills.

2.4.1 The National Skills Development Strategy

The initial National Skills Development Strategy (Republic of South Africa 2001) was formulated to address the gaps in workplace skills development, later supported by a series of practical guidelines published by the South African – German Development Co-operation Skills Development Research Series (German Technical Co-operation 2004-2005)..

Based on these initiatives, the Higher Education Qualifications Framework (Republic of South Africa 2007), Quality Council for Trades and Occupations (QCTO, established in 2009) and White Paper for Post-School Education and Training (Republic of South Africa 2013b) gave policy emphasis to WIL implementation, for vocational qualifications.

During this period, little published evidence indicates that higher education institutions evaluated the effectiveness of their WIL frameworks, relative to the career competence needs of specific sectors. One such article (Holtzhauzen and Du Toit 2009) sets out to evaluate the process of work-integrated learning in the Unisa Department of Public Administration and Management, for benchmarking implementation at other higher education institutions in South Africa. Focussing on the principles of adult learning theories, an exploratory case strategy was employed; including an investigation of the different roles of the lecturer, design and development of effective WIL programmes, and assessing students’ mastering of required learning outcomes.

The Council on Higher Education *Work-Integrated Learning: Good Practice Guide* (2011) highlights that in the South African higher education system, vocational education has been

strongly influenced by professional councils, many of which contribute to curriculum development and assessment of student learning and competence in their respective occupational fields. The CHE Good Practice Guide also highlights that the alignment between work and education implied in WIL is not restricted to work placement. There are many different WIL practices, along a continuum from theoretical to more practical forms. When WIL includes workplace exposure, the intention is to encourage students to reflect on their experiences, to develop and refine their own understanding and capabilities.

2.4.2 The National Skills Development Strategy III Progress Report

(Republic of South Africa 2013) reflects critically on several goals related to the achievement of effective WIL for SMME businesses, including:

- Increasing access to occupationally-directed learning programmes;
- Promoting the growth of a public FET (since renamed TVET) college system that is responsive to industry sector skills needs and priorities;
- Encouraging better use of workplace-based skills development;
- Supporting co-operatives, small enterprises and training initiatives;
- Building career and vocational guidance processes.

Following the NSDS III Progress Report, several WIL policy and strategic reviews have reflected the need for enhanced implementation and functionality, including:

- **Framework for providing Work-Integrated Learning in Technical and Vocational Learning** (Swiss-South African Co-operation Initiative 2013), which identifies seven 'core business' guiding principles for effective WIL planning and implementation by colleges and universities.
- **DHET Draft Framework for Providing Work-Integrated Learning in Technical and Vocational Education and Training Colleges** (Republic of South Africa 2013a); which includes a DHET draft policy context, guiding principles, types of WIL, implementation processes; and specifies roles of stakeholders.
- **Fact Sheet on Work-Integrated Learning** (SA Board for People Practices 2014) which includes descriptions of various types of WIL, benefits for employers, principles for successful planning, co-ordination and implementation; and key WIL roles for private sector training providers, as well as post-school educational institutions.

- **Towards a Policy Framework for Work-Integrated Learning** (Southern African Society for Co-operative Education 2014). An edition of the SASCE African Journal for Work-Based Learning is dedicated to the development of a policy framework for WIL, because “a single, agreed policy framework for all levels of the (higher education) system has been absent” ... and “consequently, only a relatively small number of students have benefited from WIL”.
- **Hire Power: Harnessing the numerical power of small businesses to increase placement opportunities for FET College students** (SA College Principals Organisation 2014). This study of current WIL models and gaps highlights government policy, placement capacity within colleges, the need for employer support, placement monitoring and evaluation; collaboration with SETAs, views on student placement with small businesses; and the significant roles of organised business formations, “to drive a bottom-up initiative to engage small businesses in placement activities”.
- **Medium Term Strategic Framework (MTSF) 2014 – 2019** (Republic of South Africa 2014b). The national government’s updated Five Year Plan, based on National Development Plan and National Skills Accord strategies, consists of fourteen developmental outcome goals, *inter alia*:
 - “Quality basic education;
 - Decent employment, through inclusive growth;
 - A skilled and capable workforce, to support an inclusive growth path; and
 - An efficient, competitive and responsive economic infrastructure network”.

The detailed plans for achievement of MTSF 2014-2019 national socio-economic developmental outcomes underscore the need for building equitable access and workplace competence in the South African SMME workforce, through institutional regulatory frameworks for occupationally-directed learning programmes which promote effective workplace-based skills development.

CHAPTER 3

RETAIL SMME BUSINESS DEVELOPMENT IN SOUTH AFRICA: SIGNIFICANCE AND CHALLENGES

3.1 Socio-Economic Significance of the Wholesale & Retail Business Sector

The Wholesale and Retail (W&R) sector is a significant component of the South African economy. According to an analysis commissioned by the Department of Trade and Industry of the sector's contribution to employment growth and poverty reduction (NALEDI 2007) and 2014 StatsSA data, W&R is the fourth largest contributor to Gross Domestic Product; almost 30 000 tax-registered enterprises employ 19% of the total economically active workforce.

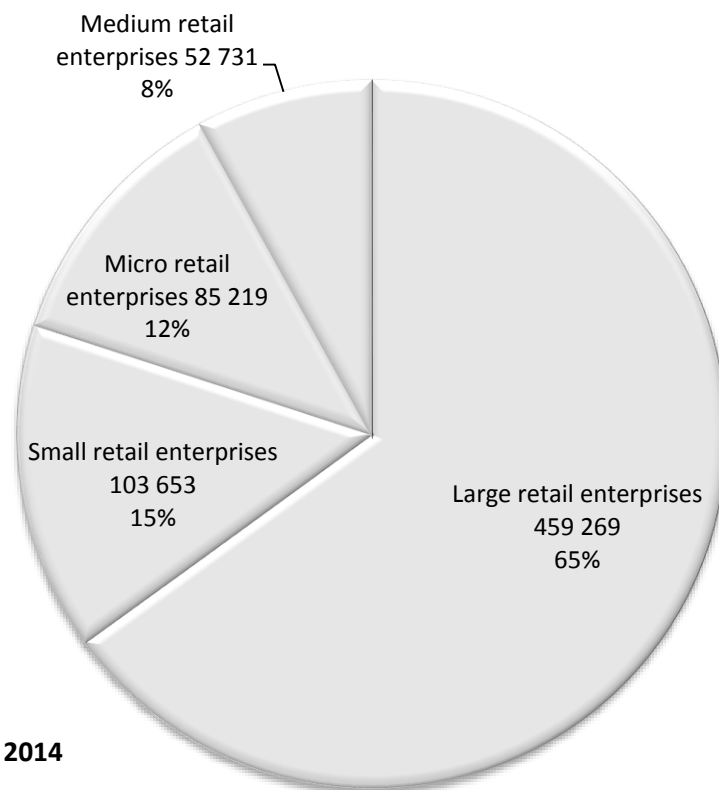
The National Development Plan (Republic of South Africa, 2012) projects that by 2030, about 70% of South Africa's population will live in urban areas; that 90% of new jobs would be created by SMMEs; and that about 79% of SMMEs would be in the retail sector. The W&R Sector Skills Plan (W&RSETA 2014:30) indicates that highest densities of retail enterprises are in the urban regions of South Africa. These regions are home to 63% of the total registered national W&R workforce; and were the focal regions for the present study.

Urban South Africa is moving increasingly towards mall-based retailing; a trend which is generating negative implications for the competitive sustainability of SMME traders (Gauteng Department of Economic Development 2012; Linake 2014; Hadingham 2015; Mazwai 2015; Kiva 2015) and for the future growth and job creation potential of retail SMMEs.

The job creation data of large (annual sales greater than R78 million per annum), medium, small and micro retail enterprises is regularly monitored by Statistics South Africa. The relative employment and career scope by retail enterprise size, as reflected in StatsSA data (2014) in Figure 3.1 below, is therefore significant in this study of factors which tend to promote or constrain the scope for effective WIL with SMME retailers.

According to StatsSA 2014 data, total retail trade employment was 700 872 jobs. Analysed by retail enterprise size, large enterprises had by far the highest number of employees (65%), followed by micro (15%), small (12%) and medium enterprises (8%). These data reflect the workplace dominance of large retail corporates; and the challenge of identifying WIL opportunities in retail SMMEs. As a consequence, the achievement of National Development Plan and Department of Small Business Development strategies for inclusive, equitable and sustainable job creation, is also a significant challenge.

Figure 3.1: Employment by Enterprise Size in the Retail Trade



Source: StatisticsSA, 2014

No reliable data are available as a basis for defining capacity criteria for effective WIL placement and mentoring with SMME retailers. Reinforcing the current reality of employment dominance by the relatively few large retail corporates, the W&R Sector Skills Plan (W&RSETA 2014) notes that “*about 86% (24343) of the 27553 registered enterprises in this sector consist of small and micro enterprises, compared with 9.5% (2325) medium size and 4,5% (885) large enterprises*”. W&RSETA management acknowledges that micro and small enterprises are least likely to have the capacity to supervise WIL and mentor students effectively; indicating that the estimated 2325 medium size enterprises (51-150 staff) should be prioritised in terms of defined ‘due diligence’ criteria, for WIL placements.

3.2 Constraints to sustainable SMME Retailing: Access and Expansion

Building on a Gauteng Department of Economic Development (2012) paper on the *24 Hour Economy in Gauteng Cities*, Battersby and Peyton (2014) studied the socio-economic effects of urban retail location and access for city-dwellers. They conclude that although the expansion in the number of supermarkets in recent years is well-documented, the impact of this urbanisation process is not well understood. In their view, existing academic literature does not engage with the spatial distribution of, and access to, emerging SMME retailers. Their findings underscore the National Development Plan recommendation to review urban

regulatory frameworks for inclusive business spatial planning, with enhanced access to trading licences and affordable public transport for disadvantaged community access.

According to SMME development practitioner Mazwai (2015), Business / Partners regional manager Mfenyana (2015), SA National Co-operatives Council executive chairman Skenyana (2015), SA Small and Medium Enterprises Federation chief executive Lotter (2015), SA Society for Co-operative Education executive Forbes (2015) and Informal Traders Alliance activist Kiva (2015), there is little doubt that business management skills and finance support are keys to inclusive SMME socio-economic expansion, sustainability and student career attraction. Although SMME development is one of government's priority programmes, the *Global Entrepreneurship Monitor* survey (Herrington, Kew and Kew 2014) highlights South Africa's record of below-average entrepreneurial and small business development; and the need for more information about the drivers of entrepreneurship and SMME developmental barriers, which need to be overcome.

These developmental barriers are considered in the Unisa Bureau of Market Research Report 434 (2013), which reviews practices in SMME businesses in Soweto, the major 'township' area within the City of Johannesburg. The BMR Soweto study confirms the survivalist nature of the majority of SMME retailers; classified into three groups:

- small formal businesses, located in demarcated business areas;
- home-based micro retailers in residential areas (e.g. spaza and tuck shops); and
- hawkers (street vendors), often located in informal markets at transport interchanges.

According to the BMR Soweto study, corporate retail business in township areas has expanded rapidly since 2004, with the establishment of large retail malls. These dominant new trading spaces are largely occupied by corporate retailers and their franchise businesses. Mall rental costs typically exclude small and micro retailers.

During the period 2007 – 2011, the BMR also conducted a longitudinal study of the sustainability and co-operative growth potential of SMME businesses in Soweto. A panel of 300 SMME businesses was monitored in the five year period. Emphasis was placed on the potential of SMMEs to sustain their business activities within the competitive corporate and complex regulatory environment. Only 130 of the BMR panel of 300 SMME businesses identified in 2007 were still operational in 2011; a survival rate of 43.3% after five years. Significant to the achievement of retail WIL objectives, is the survivalist nature of small and micro enterprises, measured in terms of sales growth, job creation and perceived career scope, for potential WIL students and their educational institution placement staff.

3.3 Department of Small Business Development: Policies and Strategies

A policy paper on national strategy for small business development was published by the Department of Trade and Industry (Republic of South Africa 1995). Recognising the need for enhanced strategies to promote sustainable SMME growth, inclusive skills development and competitive sustainability, the Department of Small Business Development (DSBD) was recently established.

Access to developmental policy information for SMMEs and Co-operatives, gleaned from the DSBD Strategic Plan 2015-2019, Lephatsi Investments (Mashaba 2015), Small Enterprise Development Agency (2014) and Business/ Partners (Mfenyana 2015) sources; as well as the Parliamentary Portfolio Committee on Small Business Development (Bhengu 2015), suggest that slow progress is being made with SMME financial literacy, skills development funding and regulatory policies, which are constraints for potential business investors, vocational WIL placement officers and aspiring retail career students.

CHAPTER 4

FINDINGS: STAKEHOLDER PERCEPTIONS OF WIL BENEFITS, PROBLEMS AND STRATEGY

4.1 Situational Analysis: DHET Chief Director: Work-Integrated Learning

In responding to the research objectives of the present study, DHET Chief Director: Work-Integrated Learning (Mashabane 2015) commented that “there is currently little information that is of significance to your WIL with SMMEs study”, explaining as follows:

- The Chief Directorate WIL was established in 2012, primarily to promote partnerships for work placements; and to provide policy support to students/graduates and Post School Education and Training (PSET) institutions. The Chief Directorate was established from scratch; it did not take over from any existing unit. For this reason there are no historical records in the DHET, documenting WIL activities.
- The reason for establishing the DHET WIL Unit came from realisation of two strategic problems affecting students and graduates. There are students who are unable to complete their learning programmes, because part of the curriculum requires them to learn actively in the workplace ; but because of weak industry-institution relationships, these students cannot find opportunities to complete this vital component. Then there are graduates who face barriers to enter the world of work, because they lack relevant work experience. The DHET has therefore spent the last two years facilitating the following:
 - Steering PSET institutions, like SETAs, to forge partnerships with TVET colleges, thereby opening up possibilities for partnerships with commerce and industry;
 - Requiring SETAs to plan and fund hard numerical targets of placement (whether for WIL or for workplace experience); and
 - Actively lobbying government departments, state entities and employers (via their collective formations) to open up their workplaces for WIL.
- The DHET recently initiated a deeper discussion around WIL and has begun to embrace an inclusive concept of Workplace Based Learning (WBL). What is commonly referred to as Work-Integrated Learning (WIL) is just one form of Workplace Based Learning; the others include learnerships, apprenticeships, internships, and employment candidacy. DHET officials are now planning to commence with updating the policy frameworks, to support all the various forms of practical learning in the workplace.

In recent months, reviews of the effectiveness of current WIL and other vocational skills development strategies have been initiated by educational governance thought-leaders and talent development practitioners. Two recent vocational talent development events are summarised below, with implications for the present study.

4.2 Department of Higher Education and Training and National Skills Authority: WIL Workshop

Convened by the DHET and the NSA in March 2015, this WIL Workshop had the collaborative theme of *“Together, Turning Every Workplace into a Training Space”*. The agenda sought to facilitate sharing of stakeholder experiences, perceptions, funding models and best practices to promote workplace-based learning; and to develop enhanced WIL policy and implementation strategies. Delegates from commerce, industry, SETAs, HET and TVET institutions participated in thought-provoking WIL policy review commissions.

Among the DHET WIL Workshop agenda topics relevant to the present study, were:

- The urgent need for a clearly defined national WIL policy, conceptual framework, placement and funding modalities (Blom 2015).
- Potential benefits of WIL placement in small businesses ? A delegate from the SA Graduates Development Association asserted that “properly selected and briefed, graduates and interns can help make a small business work better”.
- The Employability Improvement Project; a bilateral co-operation between the DHET and Japan International Co-operation Agency. This Pre-WIL workplace simulation project has been piloted at seven Universities of Technology. The value of Pre-WIL ‘virtual workplace’ active learning was highlighted, indicating the need for “building Innovation, Implementation and Improvement in the ‘virtual workplace’ before students are deployed for practical learning and application, in a real workplace”.
- W&RSETA ‘Schools of Excellence’ (SOE) programme. Building on the pre-WIL principles and the need for higher education institutions to develop retail staff skills and sector partnerships, W&RSETA Chief Operations Officer Sipengane (2015) outlined the Retail ‘Schools of Excellence’ programme, which has been initiated in major centres. Key SOE components include partnerships between tertiary education institutions and major retailers in terms of curricula, materials development, funding of pre-WIL simulated workplace ‘practicum stores’; effective student WIL preparation, competence assessment and quality assurance.

4.3 African Society for Talent Development: Annual Conference 2015

With the theme of '*Shaping the Talent Landscape for 2030*' reflecting the National Development Plan strategies, this conference of learning & development (L&D) practitioners focused on "communities of practice and partnerships, for inclusive workplace learning and transformation ... and to consider talent challenges that participants are facing from an institutional and individual perspective" (Meyer 2015).

Delegates participated in a range of topics relating to learning and talent development strategies. Presentations were closely related to the present study of WIL strategy, for effective involvement of SMME workplaces:

- "*Cracking Africa's talent challenge: why talent development is key*"; a panel discussion of academics and business L&D practitioners. The panel included 'Black Like Me' entrepreneur Mashaba (2015), who highlighted his SMME survival and growth skills learned; and the need for well-structured and mentored WIL, to ensure effective transfer of student learning from textbook theory to SMME workplace practice.
- "*Setting up and developing a corporate learning and skills development centre*". The WIL principles outlined by executives of the SA Reserve Bank Academy (Brits 2015) and the Eskom Leadership Institution (Johnson 2015) were potentially relevant, in terms of their organisational WIL strategies. Both executives indicated that institutional competence curricula and pre- and post-WIL learner competence assessments were collaboratively done by line management and academy L&D practitioners; and both highlighted their institutional learning paradigm shifts from a former '70% classroom focus' to '70% workplace learning support', in close partnership with line management.

Subsequent discussions with experienced retail learning practitioners (Nel 2015; McMullen 2015; Pillay 2015; Snyman 2015; Bell 2015; Blake 2015; Koen 2015; Zwarts 2015; Davids 2015) reflected a similar 'workplace learning support' partnership paradigm with competent line management. They indicated that such a strategy leads to effective WIL outcomes, where branch or regional management are designated as WIL mentors. In their professional opinions, a similar WIL placement and mentoring strategy is viable, for W&RSETA and education institutions' partnerships with regional co-operatives of retail SMMEs.

4.4 SA Small and Medium Enterprises Federation and SA National Co-operatives Council: Insights and Initiatives

The South African Small and Medium Enterprises Federation (SASMEF) is “a national partnership enterprise of SME support organisations which unlocks support and resources from the political and economic centres, as a catalyst for the creation and development of sustainable SMEs” (Lotter 2015). Similarly, the South African National Co-operatives Council (SANCO) strategy is to build co-operative relationships with the Department of Small Business Development, SETAs and other accountable stakeholders in the small business development arena (Skenyana 2015).

SANCO and SASMEF executive members indicated that while the development of SMMEs has been a policy focus area of national, provincial and local governments, as identified in the White Paper on Small Business (Republic of South Africa 1995) and more recently in the National Development Plan, data limitations have been a hindrance to monitoring SMME growth and sustainable employment. This collaborative governance constraint is also reflected in the SMME employment position paper presented at the Economic Society of South Africa (Amra, Hlatshwayo and McMillan 2013), which stated that “86 percent of SMMEs were not registered; and that over 60 percent of SMME owners had less than a matric education”; making WIL with SMMEs an unattractive career development option for ambitious tertiary students.

SASMEF executives Venter and Lotter (2015) identified issues which are problematic institutional processes for effective SME workplace skills development strategies, namely:

- The inability of SME retailers to benefit from government-supported skills development programmes, especially student learnerships;
- The lack of practical reference which students have about the retail SME working environment, when they need to make their WIL education choices;
- The limited availability of relevant learning material, facilitation formats and learning outcome expectations from SETAs and education institutions; and
- Over-emphasis on accredited training and government institutions for delivery, which kill competitiveness, learning quality and skills transfer, with red tape administration.

4.5 Stakeholder Survey Questionnaire Responses

Collective frequency percentage responses to the survey questionnaire (Appendix A) and dialogic interviews with a purposive sample of 121 retail sector stakeholders are depicted below. The stakeholder profile, primarily based in major urban regions, included:

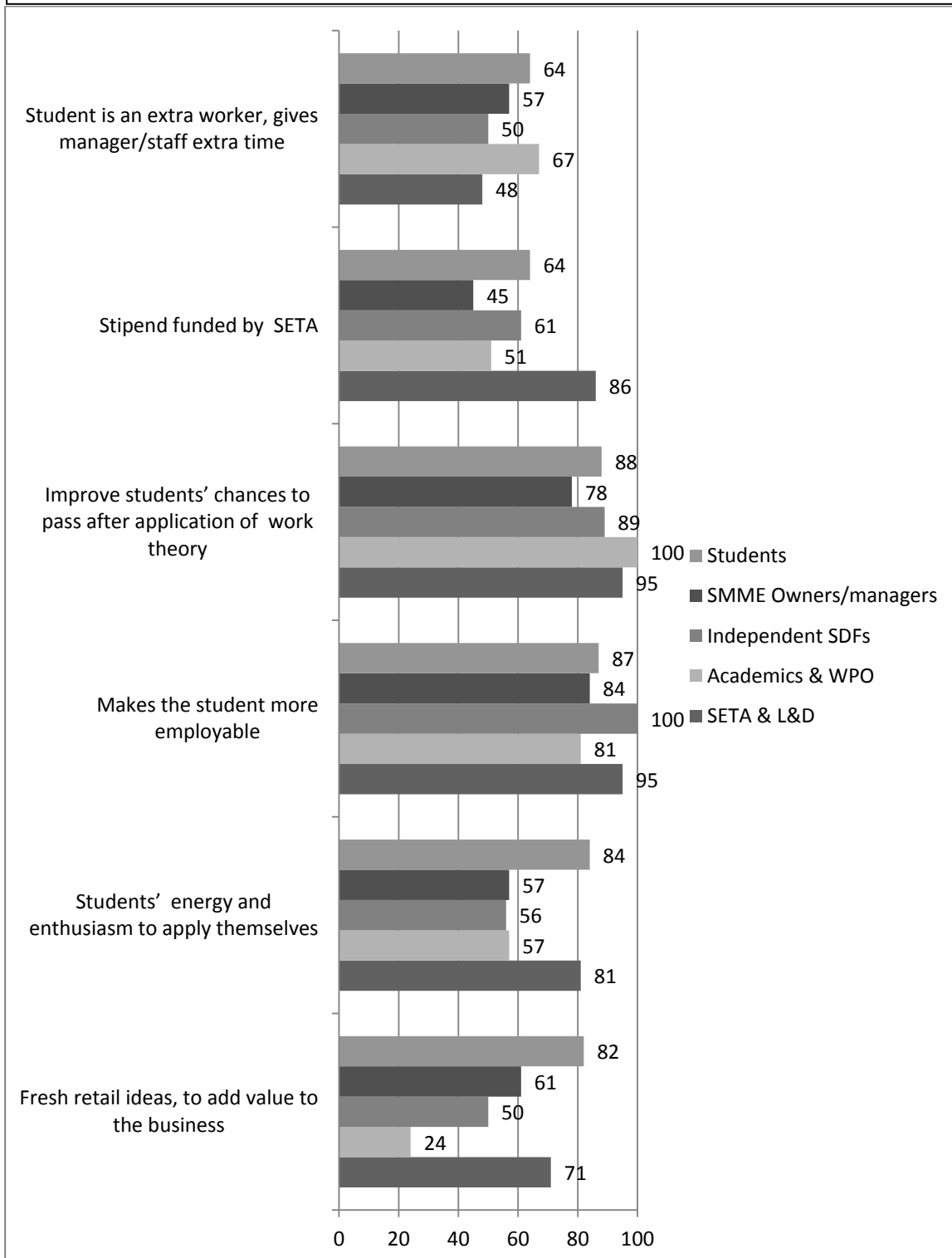
- Students (of whom 93% had WIL experience, though seldom with an SMME retailer)
- SMME owner/managers and trade associations (of whom 84% have hosted a WIL student, not necessarily as an SMME)
- Academic staff, work placement officers and independent retail skills development facilitators (of whom 100% have had some WIL involvement)
- DHET and SETA management; and retail learning & skills development practitioners.

For each survey questionnaire item regarding WIL with SMME benefits, problems and strategy options, a figure depicts the weighted percentage frequency of stakeholder attitudes and perspectives. The summary of literature review and stakeholder survey findings inform the recommendations for promoting effective WIL with retail SMMEs, in the final chapter.

4.5.1 Perceived WIL benefits for SMME Retailers

Figure 4.1 indicates that stakeholder perspectives on the potential benefits for SMME retailers to provide effective WIL vary considerably. Respondent correlation is strongest on the SMME 'community reputation' benefits of local student competence and employability; and on the potential business growth value for the SMME of a well-educated, 'tech-savvy' and career- motivated young entrepreneur.

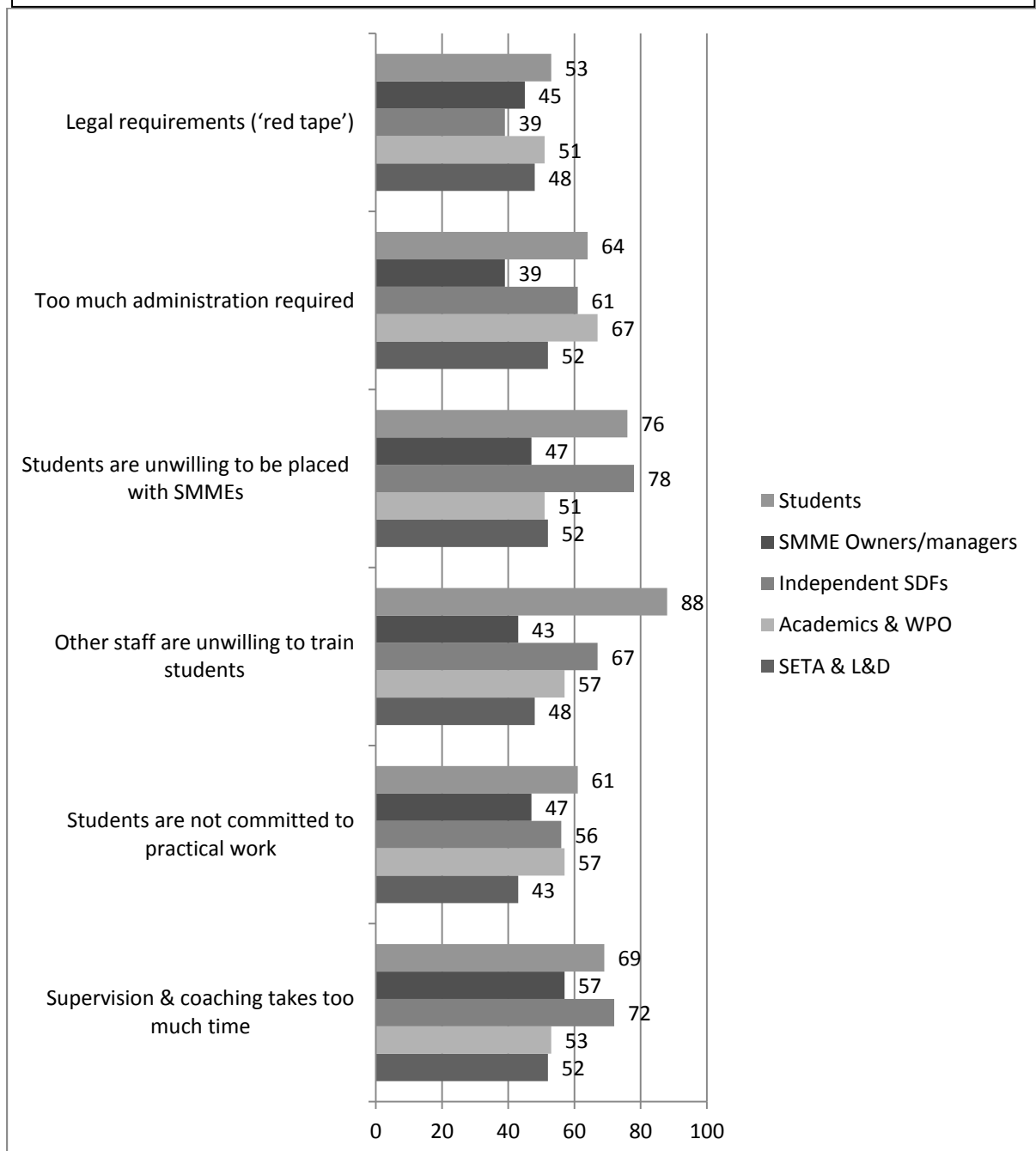
Figure 4.1 Perceived benefits for SMME Retailers if they take WIL students into their businesses



4.5.2 Perceived WIL problems for SMME Retailers

Figure 4.2 highlights the frequently-held perception of most stakeholders that SMMEs do not have adequate time or expertise to coach or mentor student learners effectively; this may explain the reluctance of many students to be placed in SMMEs, for their workplace phase. Legal and administrative WIL requirements, however, are not seen as a significant problem.

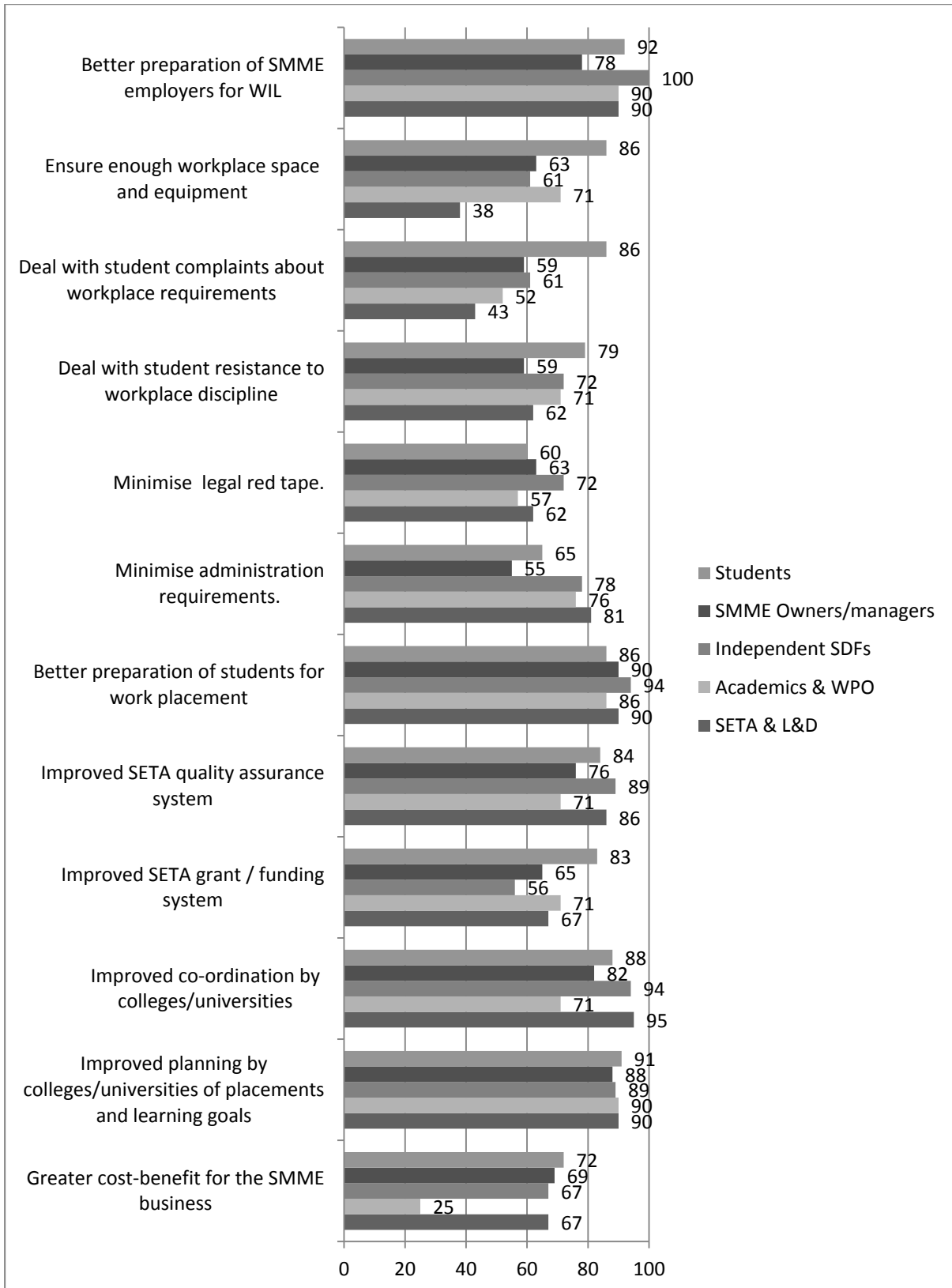
Figure 4.2 Perceived problems for SMME Retailers if they take WIL Students into their business



4.5.3 Priority WIL policy and strategy options which could improve effective work placement of students with SMME Retailers

Figure 4.3 reflects the diversity of stakeholder priority strategy ratings for improved student WIL and effective retail SMME placement. Highest priority ratings reflect the perceived needs for enhanced institutional WIL planning and co-ordination of SMME placements and workplace skills learning goals, improved preparation of students for SMME workplace realities; and accountability for quality assurance of SMME workplace management and mentoring standards. Enhanced SETA funding or WIL cost-benefit incentives for effective SMME participation is noted as a priority by some stakeholders.

Figure 4.3 Perceived priority of strategy options which could improve effective work placement of students with SMME Retailers



4.5.4 Should Work-Integrated Learning be compulsory for all retail-related courses offered by universities and colleges?

Stakeholder responses to this fundamental policy question reflect broad endorsement of the vocational education value of WIL; although noting policy and process constraints which need to be resolved, for effective workplace preparation, integration and learning.

- **Academic staff and work placement officers**

- Yes: 99%: "As with all academia, there are WIL policy camps and divisions. A relevant balance of business theory and workplace skills development is essential for student career success, to become employable."
- No: 1%: "Because not all students are employable – it may be a waste of time if the student is not really committed to learn and work hard, on the WIL job."

- **Students**

- Yes: 100%: "Practical learning & real life experience is essential, to be employable; but will we get the right business experience in an SMME?"

- **SMME retailers and trade associations**

- Yes: 100%: "Practical workplace learning is a must, for students to become competent retailers; but the universities, colleges and corporates must be more pro-active and supportive in WIL planning and quality assurance of SMME learning...nobody has ever come to my small business to check on student workplace progress."

- **DHET and SETA management and learning & development practitioners:**

- Yes: 100%: "Practical workplace knowledge and skills are vital, for career success...but we must improve the matching of theory inputs and SMME workplace learning support outcomes, to achieve student employability and career scope."

4.6 Summary of Key Findings

Based on the literature review, stakeholder responses and perspectives reported in this study, the overall WIL findings are broadly aligned with the National Development Plan socio-economic strategies to strengthen the SMME business sector, towards inclusive entrepreneurial and youth skills development, with economic sustainability.

- **Stakeholder consensus perceptions and attitudes to WIL**

Clearly evident in the findings is stakeholder consensus regarding the value of well planned, integrated and implemented student WIL with retail SMMEs, in terms of practical skills development, employability and career scope in the sector.

Not evident, however, is consensus regarding criteria and modalities for WIL effectiveness, processes for co-ordinating academic and SMME workplace learning outcomes; and strategies for cost-effective synergies between vocational education institutions, learning governance agencies (DHET, CHE, QCTO), corporates and SMME workplace mentoring. Reflecting this diversity of WIL perceptions, a seasoned stakeholder has described South African WIL policy and implementation as “vigorously contested terrain”.

- **Academic staff and work placement officers**

Almost all academic and work placement staff recognise the value of career-relevant WIL, in its various modalities. Concerns expressed relate to the current diversity of approaches and the need for consensus on a defined WIL framework, which will be credible for employers and students alike; and challenges of time management for SMME workplace assessment and quality assurance of learning.

- **Students**

All students surveyed are eager to gain relevant workplace experience and employable skills, towards a recognised qualification. Most expressed preference for their WIL within a well-known, large business where they will gain good practical exposure; and be able to show this “reputable business” experience on their CVs. In this context, few students believe that SMMEs will meet these “competence” and “employability” criteria.

- **SMME retailers and trade associations**

Many SMME respondents recognise the value which they themselves gained from good workplace experience; and want to help “make a difference” in their communities, as well as improve the profile of their business, by developing competent young talent. Adequate time for WIL duties in small or micro enterprises is frequently identified as a “major constraint” to coach a student; regional SMME co-operatives and financial support should therefore be built in to WIL policy, to achieve viable workplace learning.

- **DHET and SETA management and learning & development practitioners**

Most DHET and SETA executive management, as well as several independent L&D practitioners, are aware of the current diversity of the current of WIL interpretations; and support the need for a national WIL policy and regulatory framework (W&RSETA 2013a, 2013b, 2014a, 2014b, 2015).

Proposals from retail sector educational institutions are urgently needed for discussion, especially relating to (a) curriculum constraints, (b) capacity-building of SMME co-operatives for WIL support; and (c) funding of competent regional WIL mentors.

CHAPTER 5

RECOMMENDATIONS

Cognisant of the need for “academic interaction with social partners, investigating the contribution of universities to economic and social development” (Kruss, Haupt, Visser and Aphane 2013); and based on the summary of key findings, recommendations are made towards the review, endorsement and mobilisation of strategies for effective Work-Integrated Learning with competent, committed retail SMMEs.

Recommendations are based on the principles of Modern Workplace Learning (Hart 2015) illustrated in figure 2.1; and are summarised for collaborative consideration by W&RSETA thought-leaders and DHET policy executives, HET and TVET retail vocational education practitioners and SMME developmental roleplayers.

5.1 W&RSETA: Report endorsement and mobilisation

W&RSETA executive management participated positively in this WIL with retail SMMEs research project, describing it as “an important mandate for our facilitation and co-ordination”. They have endorsed the need to strengthen SMME retail business management and financial literacy, building effective WIL mentorship, practical skills learning and student employability outcomes. To this end, it is recommended that:

- Policy documents, including SMME Funding and Skills Support Policy, SACPO “Hire Power” (2014) small business placement programme proposals and HET/ TVET ‘School of Excellence’ learning strategies should be reviewed and updated, where appropriate.
- Implementation of recommendations towards enhanced WIL policy and processes should be led by W&RSETA management and board representatives, to define and mobilise capacity criteria for WIL placement with competent medium and small retailers , within the Sector Skills Plan priorities and regulatory frameworks.
- Throughout the phases of HET and TVET consensus around policy and process review and mobilisation towards enhanced quality and quantity of WIL within SMMEs, W&RSETA executive management and board representatives of retail employer organisations should play a facilitative role, towards collaborative achievement of the socio-economic transformation vision of the National Development Plan and National Skills Development Strategy III vocational learning outcomes.

5.2 HET and TVET Institutions: Strategies for effective WIL with retail SMMEs

Noting that this research and evaluation topic was initiated during a progress review of the W&RSETA qualifications management body, it is recommended that the findings and strategies should be considered by a purposive group of HET and TVET retail vocational educators, to optimise the validity and synergy of this position paper. Agenda items for a W&RSETA-led review of effective WIL with retail SMMEs should include:

- WIL stakeholder survey findings and SMME placement priorities, for shared clarity.
- Responses from educators: shared understanding of Work-Integrated Learning / Co-operative Education policy and processes; supported by HET / TVET evaluations of their institutional WIL effectiveness with retail SMMEs, for placement strategy criteria.
- SMME 'due diligence' capacity criteria, DSBD and SANCOC/SASMEF developmental insights, towards increasing WIL placement numbers with learning quality assurance.
- Agreement on HET and TVET institutional steps, based on the SACPO 'Hire Power' (2014) programme proposal : including enhancement of WIL strategies with retail SMMEs, for consideration by SETA, DHET and /or DSBD management.
- Given the cross-sectoral implications of effective WIL with SMMEs, it will be appropriate for W&RSETA recommendations to be referred to a SETA CEOs Forum, for collective endorsement and engagement with DHET and National Skills Authority thought-leaders.

5.3 Department of Higher Education and Training: WIL policy, processes and SMME capacity-building strategies review

DHET officials are well aware of WIL policy and process stakeholder dissonance; leading to the recent DHET / NSA WIL Workshop, which was the platform for a range of stakeholder commissions to debate the way forward towards more socio-economically effective national strategies for WIL and workplace competence.

- The DHET Chief Director: WIL (Mashabane 2015) has undertaken to submit enhanced WIL policy, process and funding infrastructure recommendations to the HET Minister in the near future. It will therefore be opportune for well-defined policy and process inputs from the SETA CEOs Forum and HET/TVET stakeholder engagements to be tabled with DHET executive management, for collaborative consideration.

5.4 Department of Small Business Development: SMME and Co-operatives capacity and competence support, for WIL effectiveness

As indicated in the findings, many stakeholders highlighted the fundamental need for SMME retailers to be capacitated for effective workplace learning and skills development outcomes, for aspirant WIL students to become employable in this volatile business sector. The policy review process underway within the recently-formed Department of Small Business Development has also been noted; and discussions with the chairperson of the Parliamentary Portfolio Committee on Small Business Development (Bhengu 2015) have indicated a readiness for policy enhancement proposals. SANCOC and SASMEF leadership have interacted with DSBD officials, striving to build commitment to co-operative SMME developmental strategies, including small business incubators and twinning with corporates.

- Once the steps recommended earlier are achieved, SANCOC and SASMEF roleplayers could engage with W&RSETA , DSBD and COMENSA leaders, in order to define SMME capacity norms, funding and regulatory policies for business management competence, with incentives for effective WIL mentorship capacity and quality assurance.
- Dependent on the policy and process outcomes of the DHET/ NSA WIL Workshop, the regulatory framework may require further research, for effective organisational twinning , mentoring partnerships and WIL implementation in retail SMMEs.

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TOWARDS EFFECTIVE WORK-INTEGRATED LEARNING (WIL) IN THE SMME RETAIL BUSINESS SECTOR

Thank you for participating in this short survey; we value your well-informed experience, insights and recommendations about effective student placement for Work Integrated Learning (WIL) with Small, Micro and Medium-size Enterprise (SMME) retailers.

1. Please tick one box describing your relevant role, for all questions in this survey:

• Manager /Owner of a retail business with the following number of staff (* see below) 1 – 5 <input type="checkbox"/> 6 – 20 <input type="checkbox"/> 21 – 50 <input type="checkbox"/> 51 – 150 <input type="checkbox"/>			
• Student at a university		• Student at a TVET college	
• Staff member in a TVET college		• Staff member in a university	
• Work Placement Officer at a TVET college or university		• Service Liaison Officer/ Skills Development Facilitator	
• Other role: _____			

2. Please select your most relevant experience of student placement for Workplace learning:
(please tick only **one** box)

• I have employed students (graduates) to give them workplace experience	
• I have placed students (interns) in a retail business to get workplace experience, as part of their learning programme	
• I have gained retail workplace learning experience as a graduate	
• I have gained retail workplace learning experience as an intern	

3. Please rate the BENEFITS for SMME Retailers if they take students into their businesses for workplace learning.

Use a scale of 3, where 3=major benefit, 2= some benefit and 1= minimal benefit. (Leave open, if 'no benefit')

• Fresh retail ideas, to add value to the business		• Students' energy and enthusiasm to apply themselves	
• Makes the student more employable, to get a decent job.		• Improve students' chances to pass because they understand the application of work theory better.	
• Stipend / allowance funded by the SETA, not by the business		• Student is an extra worker, so gives manager/staff extra time	
• Other benefits of Workplace experience with SMME retailers (explain and rate) _____			

***SMME Definitions by staff numbers: 1-5 =Micro; 6-20 = Very Small; 21-50= Small; 51-150= Medium**

4. Please rate the **PROBLEMS** for **SMME Retailers** if they take students into their businesses, for workplace learning.

• Use a scale of 3, where 3=major problem, 2=some problem and 1= minimal problem.		• Students are not committed to doing practical work properly	
• Other staff are unwilling to train students		• Students are unwilling to be placed with an SMME business	
• Too much student administration is required		• Legal requirements ('red tape')	
• Other problems/ constraints of student workplace experience with SMME retailers (please explain and rate)			

5. In your opinion, should work placement learning of students be compulsory for all Retail related courses offered by universities/colleges?

Yes	No	Why? _____
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6. Please rate the priority of each of these strategy options, which could improve effective work placement of students for experience with SMME Retailers. Use the following priority scale: 3=high priority, 2= medium and 1= low priority. (Leave open, if not relevant)

• Greater cost-benefit for the SMME business	
• Improve planning by colleges/universities of placements and learning goals	
• Improve co-ordination by colleges/universities of placements and learning goals	
• Improve the SETA grant / funding system	
• Improve the SETA quality assurance system	
• Better preparation of students for work placement in an SMME	
• Minimise administration red tape requirements.	
• Minimise legal requirements.	
• Deal with student resistance to workplace discipline	
• Deal with student complaints about workplace requirements	
• Ensure enough workplace space and equipment for the student	
• Better preparation of SMME employers for student work placement	
• Other WIL placement recommendation(s):	

Name

Date

Signature

21 April 2015

LETTER OF INFORMATION AND INFORMED CONSENT:**Research Project 2015/16:**

**"TOWARDS EFFECTIVE WORK-INTEGRATED LEARNING (WIL)
IN THE SMME RETAIL BUSINESS SECTOR"**

Dear Participant

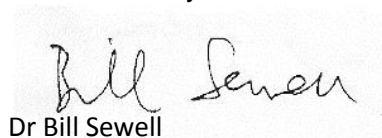
I am currently undertaking a research project on behalf of the Wholesale & Retail Leadership Chair at Cape Peninsula University of Technology. This national study aims to produce an objective position paper, reflecting the current state of Work-Integrated Learning/ Co-operative Education in the SMME Retail Sector.

Would you please agree to complete a research questionnaire (or be interviewed) for this study? The questionnaire/interview will take approximately 20 minutes. **Participation is voluntary and you are free to refuse to participate at any time without giving reasons, and without prejudice.** The information you give will be used for research purposes only, and will be aggregated with other responses, so that only the overall or average information will be used. Your identity and individual answers will be kept confidential. If any quotations are used, these will remain anonymous, unless you consent to specific quotations in the paper. To discuss this request further, please feel free to contact me on the number below; or the W&R Leadership Chair, Professor Roger Mason, on: masonr@cput.ac.za or 021 460 3040.

By completing the questionnaire or being interviewed, you are confirming that the purpose of the study has been adequately explained to you, that you understand that you may withdraw from it at any time without giving reasons; and that you are taking part voluntarily.

Your professional input will be greatly appreciated, to assist in the preparation of a meaningful position paper & recommendations, for the Wholesale & Retail Leadership Chair at CPUT.

Yours faithfully



Dr Bill Sewell

Cell number: 084 748 7674

Fax number: 086 600 1982

Email address: bill@peopleandperformance.co.za

"Informed Consent" to participate in this CPUT Wholesale & Retail Leadership Chair research project:

Name

Date

Signature

ETHICS APPROVAL LETTER