

# HOW TO DESIGN AND HARNESS THE VALUE OF WORKPLACE LEARNING IN WHOLESALE AND RETAIL



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## CONTENTS

## ACRONYMS

## EXECUTIVE SUMMARY

<b>SECTION ONE: INTRODUCTION AND BACKGROUND</b>	<b>9</b>
1.1 Introduction	9
1.2 Background	10
1.3 Research Objectives	11
1.4 Expected Outcomes and Deliverables	11
1.5 Report Outline	11
<b>SECTION TWO: LITERATURE REVIEW</b>	<b>12</b>
2.1 Introduction	12
2.2 Workplace Learning Defined	14
2.3 Workplace Learning Overview	15
2.4 Workplace Learning Framework	17
2.5 Core Principles of Effective Workplace Learning	19
2.6 Benefits of Workplace Learning	20
2.7 Matching Workplace Learning Modes to Retail Business Needs	22
2.8 What is Successful Workplace Learning and How Would We Know	25
2.9 The Evolution of Workplace Learning in South Africa	28
2.10 The Impact of Apartheid Laws	29
2.11 Policies and Strategies of Workplace Learning in South Africa	30
2.12 Overview of the Wholesale and Retail Industry in South Africa	33
2.13 The Socio-Economic Significance of The Wholesale and Retail Industry	34
2.14 The Value of Workplace Learning	35
2.15 Methods to Design and Harness the Value of Workplace Learning in the Wholesale and Retail Industry	37
2.16 Conclusion	44

<b>SECTION THREE: RESEARCH DESIGN AND METHODOLOGY</b>	<b>46</b>
3.1 Introduction	46
3.2 Research Design and Methodology	46
3.3 Research Instruments	47
3.3.1 Literature Review and Document Analysis	47
3.3.2 Focus Group Sessions	48
3.4 Coding and Data Analysis	49
3.5 Research Limitations	51
<b>SECTION FOUR: RESEARCH FINDINGS</b>	<b>53</b>
4.1 Introduction	53
4.2 Findings from Document Analysis / Literature Review	53
4.3 Findings from Focus Group Sessions	58
4.3.1 Question 1	59
4.3.2 Question 2	60
4.3.3 Question 3	60
4.3.4 Question 4	61
4.3.5 Question 5	62
4.3.6 Question 6	63
4.3.7 Question 7	64
4.3.8 Question 8	65
4.3.9 Question 9	65
4.3.10 Question 10	66
4.4 Conclusion	66

<b>5.</b>	<b>SECTION FIVE: CONCLUDING REMARKS</b>	<b>67</b>
<b>6.</b>	<b>REFERENCES</b>	<b>69</b>
<b>7.</b>	<b>APPENDIX 1: FOCUS GROUP QUESTIONS</b>	<b>74</b>

#### **LIST OF FIGURES**

Figure 1: Workplace Learning Framework	18
Figure2: The Value of Workplace Learning	35
Figure 3: Data Coding Spiral	50
Figure 4: Data Analysis Spiral	51
Figure 5: Focus Group Sessions	59
Figure 6: Suggested Methods	62
Figure 7: Proposed Recommendations	64

#### **LIST OF TABLES**

Table 1: Workplace Learning Activities by Population Served	25
Table 2: Suggested Changes/Improvements/Additions	63

## ACRONYMS

Acronym	Name
CHE	Council on Higher Education
COSATU	Congress of South African Trade Unions
DHET	Department of Higher Education and Training
DTI	Department of Trade and Industry
DUT	Durban University of Technology
GDP	Gross Domestic Product
FET	Further Education and Training
MTSF	Higher Education and Training
NDP	National Development Plan
NSDS	National Skills Development Strategy
NTB	National Training Board
NTST	National Training Strategy Initiative
NQF	National Qualifications Framework
NTSS	National Skills Authority
NSA	National Skills Accord
NSDS	National Skills Development Strategy
NSF	National Skills Framework
OECD	Organisation for Economic Cooperation Development
QCTO	Quality Council for Trades and Occupations
ROI	Return on Investment
SACCAWU	South African Commercial, Catering and Allied Workers Union
SASCE	Southern African Society for Co-operative Education
SDA	Skills Development Act
SETA	Sector Education and Training Authority
SMMEs	Small, Medium, Micro Enterprises
SOP	Standard Operating Procedure
RSA	Republic of South Africa

Acronym	Name
SSP	Sector Skills Plan
TVET	Technical Vocational Education and Training
W&RSETA	Wholesale and Retail Sector
WSP	Workplace Skills Plan

## Executive Summary

Although interest in non-institutionalised learning and learning through life is growing, studies on workplace learning in South Africa are few and far between. Globally, there are some qualitative studies of learner perspectives, focused on the industry training experience or on the development of worker-learner and vocational identities (Chan, 2010; Moses, 2010; Piercy, 2009; and Vaughan, 2010). There are also some studies looking at structural aspects of workplace learning as a system (Cochrane, *et al*, 2007) or the way that industry-based teaching, assessment and learning is systematically organised and supported (Vaughan & Cameron, 2010a, 2010b). However, there is a general paucity of South African-based research on workplace learning in comparison to forms of, and contexts for, tertiary education, particularly as that provided through universities and institutes of technology and Technical Vocational Education and Training (TVET) Colleges.

One of the reasons for this is a relative lack of awareness about workplace learning. Another reason is the lesser esteem in which it is held. The latter is at least partly because workplace learning is focused on lower levels of qualifications on the South African Qualifications Framework. The former is at least partly because workplace learning is often seen as “just doing the job” rather than learning and because education and industry have been in an opposed relationship throughout much of the 20th century. The impact of that has been such a close association in people’s minds between the word “learning” and formal classroom settings, that it is difficult for them to appreciate that learning might occur in other, often less formal, settings such as the workplace (Eraut, 2000). Even within the workplace learning domain, research has tended to focus on professional workers and how they acquire expertise (e.g. teachers, nurses, accountants) or on how work is organised in particular sectors (e.g. manufacturing, health) rather than focusing on how nonprofessional workers learn at work (Felstead, *et al*, 2009).

Yet a good deal of adult learning in life occurs through work. Workplaces are potentially a rich source of learning, just as educational institutions are (Ryan, 2008). Much of the learning that does happen on the job occurs through explicit activities that make use of a range of pedagogical methods (Fuller and Unwin, 2002), although it is unlikely to occur against a background of professional teaching qualifications and knowledge. Learning on the job points to the importance of the context of the learning environment:

*Rather than being simply a change in the properties of the learner ... the main outcome of learning is the creation of a new set of relations in an environment. This is why learning is inherently contextual, since what it does is to continually alter the context in which it occurs (Hager, 2004).*

Actual “success” in workplace learning is a function of many interdependent factors to do with the learner, workplace conditions, business strategy and structure, training programme structure, trainer competence and teaching/ learning approaches and activities. And training on its own is limited in its ability to increase productivity unless combined with other interventions such as enhanced managerial capability, employee engagement, improved employee recognition and reward and innovative production practices (Harvey and Harris, 2008). Learning is only as good as the opportunities to actively apply and develop skills and competencies and participate in the organisation and culture of work/workers.

This report presents an independent research study on “How to design and harness the value of workplace learning in Wholesale and Retail”. It starts with an examination of literature related to workplace learning. Most of the existing theories are examined to determine useful methods to design and harness the value of workplace learning in Wholesale and Retail. In building the literature review, we recognized that there were multiple research avenues required to make meaningful insights related to workplace learning in the context of retail. From an academic research perspective, we started with exploring definitions of retail, examining the existing retail climate and employer/employee attitudes about the industry and looking at a designed workplace framework that offered a helpful definition of what effective looks like.

It became clear that employers may not recognize or define workplace learning in the same way as the researcher uses the term. Accordingly, we considered the common themes and outcomes of effective training, such as employee retention, promoting from within and other “best places to work” metrics surrounding employee growth and commitment to inform our work. These findings came in the form of news articles, reports and employer job pages, among other sources. We have used that approach to gather most of our data to date.

The report concludes with a summary of key findings on the methods to design and harness the value of workplace learning.



# SECTION ONE: INTRODUCTION AND BACKGROUND

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## 1.1 Introduction

In the 1970s the South African government identified skills shortage as a binding constraint for the ability of firms to adapt to new technology, industrialisation and globalisation. As a response it created the 'manpower training system' as a strategy to address the critical skills shortages. The manpower training system was designed to be in line with government's apartheid policy. The outcome was a highly polarised and racialized national skills development system. The system created immense developmental challenges including huge socio-economic inequalities, and an unemployment and poverty problem that was defined along racial lines (McGrath, 1996).

The defeat of the apartheid government in the 1990s meant that the new democratically elected government desperately needed to address these socioeconomic challenges. It needed to do so while also trying to catch up with a rapidly globalising world economy characterised by rapid change, unprecedented competition, new technology, fast-growing emerging markets, workforce diversity, reengineering, and a demand for new skills. The draft of the 1997 Green Paper on Skills Development Strategy for Economic and Employment Growth in South Africa advocated for a bold vision for a state-driven national skills development system in partnership with firms, labour and a range of public and private training providers (Republic of South Africa, 1996).

The robust discussions following the announcement of the Green Paper led to the promulgation of a number of skills development legislations including the Skills Development Act (SDA) (No. 97 of 1998), which established Sector Education and Training Authorities (SETAs). The SDA envisaged SETAs to act as key agencies in the delivery of skills development and workplace experience seen as essential in addressing the triple challenges of inequality, unemployment, and poverty (Republic of South Africa, 1998). The SDA also envisioned that the SETAs will manage the distribution of skills development grants to encourage firms to invest more in skills development. It was also imagined that SETAs will inspire learners to participate in training programmes and employers to use their workplaces as sites of learning and training in order to upgrade the skills of their employees and open up opportunities to new entrants eager to join the labour market to gain much-needed work experience.

This research study aims to determine the methods to design and harness the value of workplace learning in Wholesale and Retail. The study is divided into five sections. The next section examine literature related to workplace learning. The third section explains the methodology used in the research study. The research findings are presented in section four. Section five, provides the concluding remarks.

## 1.2 Background

The Wholesale and Retail Sector Education and Training Authority (W&RSETA) is one of the statutory bodies that have been re-established by the Minister of Higher Education and Training in terms of the SDA of 1998 to enable its stakeholders to advance the national and global position of the Wholesale and Retail sector. Pursuant to this, the Durban University of Technology (DUT) has been awarded a Retail Chair. The W&RSETA has commissioned DUT to do the research on a number of topics. This research report responds to the topic of “How to design and harness the value of workplace learning in Wholesale and Retail”.

The impetus for this research came from the comparatively under researched and under-recognised value of workplace learning. Yet workplaces are increasingly important as sites of learning within a framework of lifelong learning that is shared by many countries today and driven by demographic changes that place new pressures on workforce development. In its most structured form in South Africa, workplace learning has seen increased participation at rates above those of its tertiary education counterparts. Yet little is known about the value of workplace learning, workplaces as learning sites and learning processes on-the-job.

Our research questions therefore aimed at getting to grips with the different and sometimes competing imperatives of learning and producing and the different and complex contextual arrangements for learning—both of which inevitably impact on what we can recognise, observe and analyse in terms of learning and teaching. Our questions were:

- What are the teaching and learning practices—and their effects—in workplaces where people are engaged in getting their qualifications?
- What is the variety of different successful models that people use in these different workplaces?
- How can the value of such learning be enhanced and harnessed in the South African Wholesale and Retail?

### **1.3 Research Objectives**

The main objective of the study is to determine the methods to design and harness the value of workplace learning in Wholesale and Retail.

### **1.4 Expected Outcomes and Deliverables**

The research is expected to yield the following outcomes and deliverables as determined by DUT:

- Data Collection
  - Literature Review and/or Document Analysis
  - Focus Group Sessions
- Data Analysis
- Report Writing

### **1.5 Report Outline**

This research study has been conducted determine the methods to design and harness the value of workplace learning in Wholesale and Retail. The report is divided into five sections. Section one is the introductory section which highlights the background to the research project. It hence seeks to establish the rationale for undertaking the research study. It also consists of the research objectives, expected outcomes and deliverables. The second section consists of the literature review which sets out the research context by examining the literature related to workplace learning. Section three presents the research design and methodology for the study which includes the research instruments, data collection methods, coding and data analysis, validation and limitations for the study. Section four presents research findings of the study and integrates this with literature. Finally, section five make concluding remarks.

## SECTION TWO: LITERATURE REVIEW

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### 2.1 Introduction

Business leaders around the world consistently rank finding and keeping talent as one of their top priorities. Historically, it was thought that CEOs and their talent officers were referring only to more senior staff. However, as unemployment rates increases and the magnitude of the skills gap becomes clearer, finding and keeping talent at all levels becomes more of an imperative. This change in attitude can be seen clearly in the retail sector. Retailers are faced with a tightening labour market that shrinks the available labour pool along with rapid changes in their business models. They are searching for proven models to help increase sophistication in preparing and developing their workforce. Retail employers can capitalize on proven work-based learning methods that work in other industries, as well as test innovations of their own.

The retail industry is a vital force of any economy and it provides many people with their first jobs. Salespeople, cashiers, stock clerks and merchandisers make up more than half of the industry's millions of workers. They are also retail's public face—the first and often the only workers who interact with customers walking through a store. A lot rides on these interactions, as people on both sides of the cash register (physical or virtual) know well. However, these workers are unlikely to understand their value to the company and, more importantly, their ability to build on their experience and skills to move ahead in retail careers.

Despite their importance to the industry's success, the amount of training for entry-level and frontline retail employees varies but is widely considered to be minimal. Insiders acknowledge the problematic cycle of disinterest and disinvestment. Employers build turnover costs into their business models and therefore limit investment in the largest segment of their workforce. And the cycle continues.

But today, many retail employers are ready to break this cycle and develop a more effective training strategy. To do so, there are three driving realities of today's retail industry that must be recognized. First, a substantial number of retail workers are less than 25 years old and consequently have little or no prior work experience. They view their jobs as temporary positions—a chance to earn some money while in

school, or while they try to find that better job or one that will hire them with little or no experience. The frontline and entry-level positions these workers fill have one of the highest turnover rates in the economy. Second, frontline retail career pathways are different from frontline positions in other industries because of the large number of positions compared to supervisors and the lack of sector-endorsed credentials that identify a career progression. As a result, employers and employees both report that it is harder to see the career potential in the retail industry. Lastly, the future of retail is in flux. Impacted by both the need for brick-and-mortar retailers to place an ever-greater emphasis on customer experience—to differentiate themselves from and compete with online retailers—and the continuing automation innovations in all areas of retail, the numbers and types of employees will change.

As retail evolves, both the kinds of retail stores and the distribution within retail’s occupational categories will shift. However, the value of improving hiring and training practices and providing advancement opportunities will remain important investments in keeping talent given the existing tight labour market. Many retailers value “homegrown” talent, so they are increasingly interested in how to upskill and advance existing workers. In addition, employers want better prepared and more career-oriented workers who are likely to stay with them and adapt to their companies’ ever-evolving needs. However, there needs to be better information on the best ways to invest in their workers’ training to ensure both individual and company success.

Exactly how can retail employers address these challenges effectively, while continuing to run their businesses on a day-to-day basis and plan for the future? More and more, retailers are embracing workplace learning. This method of providing workplace experiences that enable youth and adults—both students and workers—to gain and practice the knowledge and skills they need to enter and advance in specific careers is a proven workforce development strategy that has been used successfully in manufacturing and other industries for years as a way to connect learning and work.

## **2.2 Workplace Learning Defined**

Even though, there is no single definition of workplace learning, this study will use a definition that looks at all training that happens at the workplace and as a direct consequence of the needs of the workplace. In his seminal work Becker (1962) formalised the theory of human capital and provided an understanding

on what drives the desire of employers and employees to invest in workplace learning. In line with Becker's propositions many governments use tax-based schemes to encourage firms to invest more in skills development. Even so, many countries are adopting the idea of creating a knowledge-based economy as a precondition to economic growth (Glastra, *et al*, 2004; Bencsik and Trunkos, 2009). The Organisation for Economic Cooperation Development (OECD) has long identified workplace training as the key pillar towards establishing a knowledge-based economy (OECD, 1996).

Human Resource Development, Lifelong Learning, Workplace Training, On-The-Job Training are some of the concepts used to refer to workplace learning. This study uses workplace learning and workplace training to refer to all training, learning, and skills formation that happen within the workplace. Likewise, two definitions of workplace learning are instructive. First, Fuller and Unwin (2003) viewed workplace learning as an all-embracing term for 'all types of learning' that come as a result of 'the needs of the workplace including formal on-the-job training, informal learning and work-related off-the-job education and training'. Second, Boud and Symes (2000) described workplace learning as a method of learning that happens on a routine on the factory floor as employees gain 'new skills to develop new approaches to solving problems.' The common theme in both explanations is that workplace learning either takes place at the place of work or responds to the requirements of the job.

Boud (1998) also warned that there is no common definition for workplace learning due to the often-competing views, ideas, interests and values of the various players in the skills development environment including employees, employers, training providers, politicians and policy makers. Making reference to the elastic use of the concept of workplace learning, McCormack (2000) noted that the conceptualisation of workplace learning depends on an allegiance to the different school of thoughts such as learning and development, human resource development, organisational development, learning organisations, and knowledge management. As an example, employees tend to view work from the perspective of its learning potential, which is fundamentally different to the perspective of employers who view work in terms of its contribution to production, effectiveness and innovation (Cullen, *et al*, 2002).

Be that as it may, workplace learning is often defined and promoted as beneficial to both employers and employees, on the one hand, and society and the country, on the other. In his study of the British post-school education and training system Forrester (1999) observed that workplace learning is promoted as a

pillar of the ‘modernising consensus’ leading to a successful and dynamic economy and also as a key contributor ‘towards addressing issues of social justice, equity and social inclusion.’ Here the first part of workplace learning is characterised, conceptualised and promoted in line with the human capital theory that hypothesises that the acquiring of knowledge and skills is linked to innovativeness, competitiveness and socioeconomic development. The second part takes a view synonymous with advocates of lifelong learning who believe that learning is an integral part towards the building of a socioeconomically inclusive knowledge-based economy. The human capital theory, knowledge economy and lifelong learning will be discussed in the next sub sections.

### **2.3 Workplace Learning Overview**

Workplace learning consists of workplace experiences that enable youth and adults—both students and workers— to gain and practice the knowledge and skills they need to enter and advance in specific careers. Workplace learning models enable employers to train current and prospective employees to meet their individual business needs. Importantly, learners perform meaningful job tasks at the worksite under the guidance of a qualified supervisor. This increases worker productivity in both the short and long terms. It also ensures a worthwhile learning experience as well as a substantive contribution to the business.

Workplace learning can range from exposing high school students to career information through activities like job shadowing, to providing existing employees with specialized training that will prepare them for new roles or responsibilities, to a registered apprenticeship model that combines credit-bearing courses with work.

Workplace learning can be designed and delivered internally, through partnership with an educational institution (high school or TVET Colleges), and/ or through a collaboration with a community-based organization. It is also possible to target specific population groups—low-income youth, people with disabilities, re-entry population, the long-term unemployed, the mature worker. These models can serve as both an entrance to the workforce and an opportunity to upskill incumbent workers. With a strong implementation plan, each can generate benefits to the employer and have a profound impact on the employment trajectory of a learner.

Employers that have implemented workplace learning report significant improvement in employee and business outcomes, including gains in key workforce skills, productivity, talent retention, and an overall positive return on investment. Many employers pair their workplace learning programs with a focus on inclusion to support greater diversity in the ranks of employees moving up the career ladder. In addition, employers see the value of this flexible and adaptable business driven training model as they prepare for significant changes in their operations because of the future of work. Finally, expanding access to workplace learning is critical to improving the career prospects of low-income and low-skilled workers while ensuring that businesses, industries and the economy as a whole have the highly skilled workforce they need to thrive.

Workplace learning strategies are also particularly adept at addressing some of the unique features of the retail talent puzzle. As noted earlier, retailers must address the needs of workers with limited work experience and underdeveloped employability skills—skills which are usually cultivated on the job. Workplace learning can be effectively used in pre-employment programs for youth. These programs recruit workers into the industry, equip them with the industry knowledge and skills necessary to contribute to a company right away and continue to support their upskilling on the job. For example, excellent customer service requires workers who have both the technical skills to answer questions about store products and the communication skills to maintain positive interactions with customers. These interactions are nuanced and hard to capture in a classroom.

As retail companies increasingly rely on customer service as a competitive advantage, workforce development will be most successful when it harnesses the wide-ranging customer service needs that occur every day in store. On-the-job training that formalizes lessons from working with real customers can improve workers' skills and a company's reputation for service.



## 2.4 Workplace Learning Framework

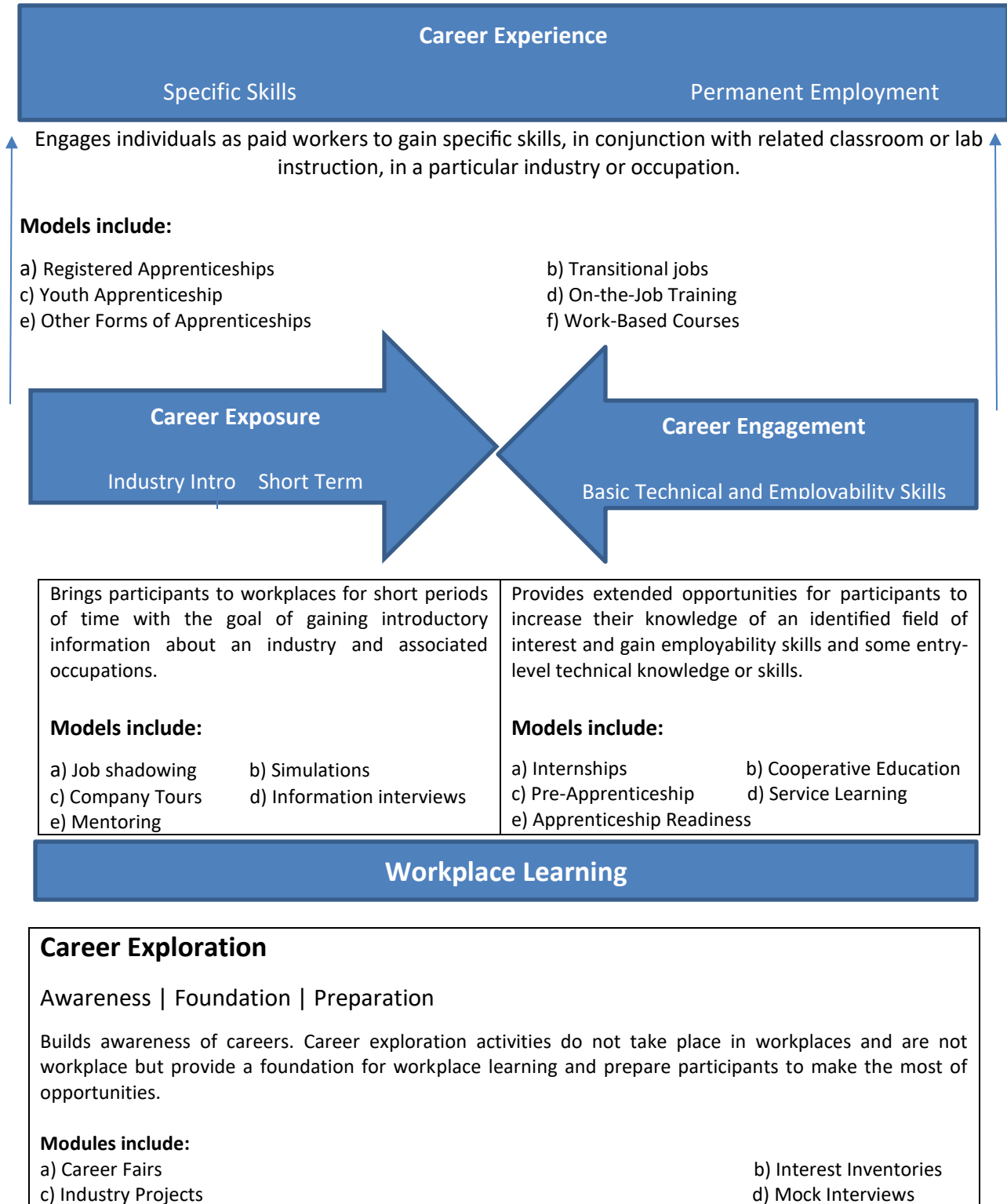


Figure 1: Workplace Learning Framework

Workplace learning can be used to have a more structured discussion of advancement possibilities. Providing workplace training for career-growth opportunities can help retain workers as they learn, even if they ultimately move on to another industry.

All of these solutions to address the realities of the retail industry align well with training designs that leverage the daily experiences of a job—these training designs are known as workplace learning. A common strategy across the economy, workplace learning has long been an integral formal training approach for some industries.

For example, health care occupations rely on clinical rotations and other documented workplace training as part of occupational licensing requirements. Registered apprenticeship programs are standard in the construction trades and manufacturing industries. In total, between 1 and 2 million interns work in the United States each year in a wide range of sectors (Howe, 2018). Internships do appear to be a typical training strategy in corporate headquarters and other high levels of the retail industry. However, according to Kazis and Molina (2016) to date, formal workplace learning programs have been less commonly used to address the fundamental career awareness and career development needs of the frontline and/or entry-level workforce at the centre of the retail industry's ongoing success.

Interestingly enough, Emsi (2017) argues that workplace learning has been at the heart of retail as a way to advance, yet it has not been named as such. In fact, for many positions, retailers value work experience over formal education. The industry as a whole requires relatively low levels of formal education and training. Only 4% of the jobs that require some postsecondary education but less than a four-year degree are defined as middle-skill, with a similar proportion of high-skill jobs. In part, this reflects the prominence of entry level jobs: there are eight times as many frontline workers as there are supervisors.

Advancement for many entry level retail workers requires entering related industries. Training that bridges to other industries needs to address the low education and credential attainment of many workers and integrate opportunities for credentials that those industries value. However, the association between advancement and formal education and credentialing masks the advancement opportunities of an industry that frequently promotes from within. On average, entry-level workers that advance from retail

salesperson to frontline supervisor see their earnings rise (Emsi, 2017). These positions do not require postsecondary education, instead emphasizing job success.

## **2.5 Core Principles of Effective Workplace Learning**

To help employers create high-quality workplace learning programs, Cahill (2015) has identified seven key principles for effective work-based learning models. These principles offer guidelines for developing features that will increase the number of individuals who access and complete workplace learning experiences, acquire skills and knowledge valued by employers and enter and advance in careers. According to these principles, effective workplace learning models include:

- **Support entry and advancement in a career track**

Effective models of workplace learning provide participants with opportunities to build knowledge, develop skills, and advance in specific career paths. Workplace learning supports the development of both industry-specific technical skills and professional skills such as communication, teamwork, and problem solving—that nearly all employers value.

- **Provide meaningful job tasks that build career skills and knowledge**

Successful workplace learning provides participants with opportunities to engage in appropriately complex and relevant tasks aligned with individual career goals. Workplace learning should include mentoring and supervision and should continue over a sustained period of time so participants have adequate opportunities to perform meaningful job tasks.

- **Offer compensation**

Compensating participants in workplace learning helps them stay focused and motivated by honouring their individual contributions to the business. Workplace learning programs that do not offer compensation are likely to preclude many individuals who need paid employment from career advancing opportunities.

- **Identify target skills and how gains will be validated**

An understanding of the skills to be attained increases the value of workplace learning to employers and learners alike. Skill validation can occur through reflective practices or formal assessments for demonstrating job competencies.

- **Reward skill development**

Effective models reinforce learning by rewarding skill development through a variety of mechanisms, including increased wages and benefits, high school or postsecondary, credit, opportunities to become permanent employees and promotions for incumbent workers.

- **Support college entry, persistence and completion**

Workplace learning should link to secondary and postsecondary programs of study and completion of postsecondary credentials whenever possible. Its role in reinforcing classroom learning and its potential to provide students with needed financial support also foster persistence and completion.

- **Provide comprehensive supports to learners, both students and incumbent workers**

Effective models incorporate career advising or coaching that help participants find the information they need to make informed choices about their careers. Child care, transportation assistance, and other supports for circumstances that challenge learner progress are critical to success for many.

## **2.6 Benefits of Workplace Learning**

Many corporate initiatives require some sort of return on investment (ROI) calculation in order to proceed and workplace learning initiatives are no different. Kaminski and Lopes (2009) states that there are many standard guidebooks on how to build a model which may be useful when trying to determine the ROI. Yet, creating a standard ROI calculation for workplace learning models is particularly challenging because every company may be looking for a slightly different outcome and inputs into the model will be slightly different. Instead, many of the companies look at more specific metrics around retention and engagement rather than relying on a macro-level ROI study.

Kaminski and Lopes (2009) highlight that the cost of investing in work-based learning should be weighed against the following benefits:

- **Reduced turnover**

Employee retention is a growing challenge in all sectors of the economy. Employees stay in a job for an average of 4.2 years. World at Work (2017) indicated that retaining retail employees is particularly difficult, with a 65% turnover rate for hourly store workers in 2016. Analysis of labour market data also revealed the ease of leaving retail from an entry level occupation, with at least six related occupations in adjacent industries with over 50,000 job postings in 2017.

- **Increased engagement**

Employees need to feel connected to their employer. For, example, participating in one's corporate social responsibility program not only provides workplace learning for frontline employees but also deepens one's commitment to the company. Employees also plan to seek out increased responsibility and apply their newly developed leadership skills to their current roles. This higher level of engagement, in turn, is shown to increase a company's bottom line (Reed, *et al*, 2012).

- **Increased productivity**

Industries, like manufacturing, that have a history of apprenticeship have demonstrated that their workplace learning programs have increased worker productivity and quality of work. Employers have seen a similar impact in retail. As one training provider recounted, many of the young people in their programs have some of the technical skills required for their job but need on-the-job training to translate their new exposure to customer interactions into quality, efficient service (Cahill, 2015).

- **Creation of a diverse management pipeline**

Until recently, the benefits of workplace learning have accrued primarily to the most highly educated and socially connected segments of the population. As workplace learning opportunities expand, more members of the underserved populations who need it the most will benefit—low-income students, low-skilled workers, the long-term unemployed and disconnected youth—all of whom participate in the frontline retail workforce. These programs can help recruit and retain diverse populations.

- **Improved company reputation**

Many employers find that providing workplace learning opportunities does more than improve their talent pipelines—it also raises the corporate profile and can be an effective marketing strategy. Best Buy, Gap Inc., and Wegmans each pair their workplace learning with community investments. Program participants and graduates share their positive experiences with friends and family members, which provides an incentive to become or remain customers.

- **Improved hiring outcomes**

Hiring new employees is a significant commitment of resources. Workplace learning models such as internships can lead to employment in cases where both the learner and the employer agree on the fit. Often, learners are placed at an employer for a predetermined period of time to help ensure that, with training, their capabilities match job expectations.

Each of these benefits demonstrates how workplace learning strategies give employers the tools to maximize their investment in hiring and training by taking full advantage of their talent pool from the beginning. This perspective transforms training and development functions from their typical treatment as a cost of doing business to a potential profit centre. Frontline retail workers are the public face of the company—its image and brand— whether working in person, by phone, or through an online experience. Engaging and retaining workers with the requisite skills in customer service, sales, technology, and teamwork is critical to organizational success. Companies that have tried workplace learning programs recognize their impact.

## **2.7 Matching Workplace Learning Models to Retail Business Needs**

Companies should consider a wide variety of factors when selecting a workplace learning model. Like any other program, workplace learning has the most power to advance a company's bottom line when it aligns with the company's most critical talent needs. Start with what is needed and pick a workplace learning model that can deliver.

Employers often identify the need to cultivate their talent pipeline by working with a specific target population and they select types of workplace learning activities for that group. (See Table 1: Workplace Learning Activities by Population Served). Other potential considerations include:

- Upskilling the current workforce to develop career pathways into management;
- Strategies for filling difficult-to-fill positions;
- Specific skills and competencies of target occupations;
- Interest in partnerships with educational institutions or community-based organizations;
- Desired role for supervisors and other expert staff; and
- Level of potential investment.

These factors can help determine an overall approach, while a job task analysis can be used to develop the specific training curriculum, including defining what can be taught in the workplace and what is best delivered in complementary classroom training. The employer's goal for the workers will determine whether a short-term program is sufficient or if a longer-term option, such as an apprenticeship, will be more effective.

For retail, shorter models are probably appropriate for more foundational or generic skill development, or for newer employees. Investment in a more structured, long-term program such as formal registered apprenticeship may make sense as an alternative to a traditional college degree. In the early stages of workplace learning design, companies should identify additional priorities for specific program elements. For example, youth-focused programs should consider what job tasks—especially those that are customer facing—are appropriate for youth and they may place a larger emphasis on employability skills for those with no work experience.

Programs that target low-income youth and adults may consider how to best incorporate supportive services such as those related to transportation, child care, counselling and financial management, etc. Many effective workplace learning programs already address a host of potential challenges and can be a starting point for design ideas.

<b>Target Population</b>	<b>Elementary and high school students</b>
<b>Common Workplace Learning Activities</b>	<b>Specific Benefits to Employers</b>
Classes tour local businesses such as manufacturing plants and retail stores. Students see on-the-ground operations and learn about a variety of jobs and careers.	<ul style="list-style-type: none"> <li>Increases public awareness of the retail industry and a variety of available jobs and careers</li> <li>Can serve as a first step toward developing valuable school-business partnerships</li> <li>Creates goodwill toward local retail businesses and industry overall, from schools, students, parents and the general public</li> </ul>

<b>Target Population:</b>	<b>High school students and opportunity youth (young adults ages 16 to 24 who are not in school, nor employed)</b>
<b>Common Work-Based Learning Activities</b>	<b>Specific Benefits to Employers</b>
High schools, community colleges, and community-based organizations partner with businesses to establish training standards and work-based learning activities. Businesses provide on-the-job training and experiences to link work and learning. Employers may also provide mentors, speakers, curriculum assistance.	<ul style="list-style-type: none"> <li>Builds a talent pipeline for the industry with the skills and competencies required for the entry-level job</li> <li>Teaches job-readiness employability skills and sets expectations for the workplace</li> <li>Lowers the cost of recruitment and onboarding</li> </ul>

<b>Target Population</b>	<b>Postsecondary students</b>
<b>Common Work-Based Learning Activities</b>	<b>Specific Benefits to Employers</b>
Companies provide opportunities to prepare for advancement, such as mentoring, coaching, and pairing workers with higher-level employees or people from other departments of interest.	<ul style="list-style-type: none"> <li>Builds the company brand and talent pipeline with motivated and experienced students working toward higher-level opportunities in the industry</li> <li>Prepares future employees with the latest in-demand skills and competencies for the retail sector</li> <li>Opportunity to identify and hire high-potential employees</li> </ul>



<b>Target Population:</b>	<b>Incumbent workers in short-term training</b>
<b>Common Work-Based Learning Activities</b>	<b>Specific Benefits to Employers</b>
Companies hire college students for internships with compensation in the form of wages or college credit. In cooperative education programs, students alternate between courses and paid employment in their chosen industry.	<ul style="list-style-type: none"> <li>• Strengthens and solidifies employee commitment to the company</li> <li>• Advances reliable, proven workers into hard-to-fill positions</li> <li>• Develops the leaders needed for company success</li> </ul>

<b>Target Population:</b>	<b>New and incumbent workers in long-term training</b>
<b>Common Work-Based Learning Activities</b>	<b>Specific Benefits to Employers</b>
New employees or entry-level workers combine on-the-job learning with related instruction, sometimes in formal apprenticeship programs, so they can advance into skilled positions. Supervisors serve as journey-level mentors in a structured training program that pairs greater responsibilities and higher wages with new skills.	<ul style="list-style-type: none"> <li>• All benefits for the incumbent worker population—often to a greater extent, due to increased engagement in long-term training—listed above, plus:</li> <li>• Prepares future employees with the latest in-demand skills and competencies</li> <li>• Provides the opportunity to identify and hire high potential employees</li> </ul>

**Table 1: Workplace Learning Activities by Population Served**

**2.8 What is Successful Workplace Learning and How Would We Know?**

There are multiple understandings of “success. These range across easily measurable success markers like employee retention and completion of qualifications to less obvious markers like employee confidence and increased participation across the organisation, improved workplace climate and employer contribution to industry development. The idea that there might be different, or even competing, ideas of success is not surprising given the range of views about what learning is and how it occurs. It is also not surprising given the range of different meanings given to, and purposes for, “workplace learning”. These purposes in particular affect meanings of success for different people and groups in this research project.

The most straightforward definition of workplace learning refers to learning that occurs in a workplace (as opposed to occurring in an educational institution). This emphasises the workplace as a location or site for training that is more convenient and more authentic (giving access to the real tools, conditions

and situations) than any other site. Other, more complex views focus on the way that learning with “a curriculum driven by the exigencies of work” (Costley and Armsby, 2007) is inextricably bound up with changes in the way the nature of knowledge is now understood (so not just its content but its functioning and effects) and the nature of the world of work. In other words, workplace learning implies more than a narrow focus on surface-level skills or competencies needed right now (Winch and Ingram, 2002).

It is about creating organisational processes and cultures in order to adapt to a future that is uncertain, both for organisations (changing markets, new skill demands) and for the individuals who work for them (diminished income and status). Some perspectives therefore also explore the way that workplace learning might also challenge the dominance of 20th century models of institutionalised education and its antagonistic relationship with the world of work (Vaughan, 2008).

The different meanings of workplace learning are usually related to the different views about workplace learning’s purposes (what is it for?), participants (who is it for?) and desired outcomes (what would successful workplace learning be like?). Lee, *et al*, 2004 suggest that perspective differences on workplace learning mean it can be understood in quite different ways. It can be seen as something that the owners/managers of firms can use to ensure workers have the appropriate skills for production. It can be seen as something that the workers can access so they can move beyond developing their skills in production and value in the labour market, to developing their capability as citizens in the wider society. It can also be seen as something of benefit for the country whose agencies may have a number of competing interests and increasing their values, which range from developing the infrastructure for “internationally competitive” domestic production to achieving equity outcomes in society.

Different perspectives on purpose, desired outcomes and the interests that should be served make for very different understandings of workplace learning—which have led to “shifting definitions and understandings of workplace learning” (Lee, *et al*, 2004) with some people across disciplines employing “different terminology to describe the same phenomenon” or employing “the same terminology when meaning something quite different”.

We have therefore, taken account of these different meanings in several ways. Firstly, we recognise that different perspectives exist and have posited the idea that successful workplace learning somehow accommodates a range of different and competing perspectives on workplace learning by those involved. We have attempted to include different perspectives on success—Success for whom? In what way or with what markers? And to what ends? —through analysis of the interviews and document analysis.

Employers or individual workers or different groups of workers might have more nuanced ideas about success. Workers might see success in terms of recognition of their skills or value to the business. However, this might not always correspond with qualifications completion. Success might manifest in terms of their standing among peers as much as through formal qualifications, or the formal qualifications might be a proxy for an invigorated attitude towards work or new confidence. Workplaces might recognise success by giving greater autonomy to workers. While “success” for employers might be completion of qualifications, that might really be a proxy for developing greater excellence in products and services—perhaps manifest in customer complaint/praise statistics, employee retention and employee contribution to innovative practices and processes.

Following this range of possibilities for “success”, and a learning as participation view of learning, we took account of Wenger’s (1998) four points of learning in workplace contexts: community (learning as belonging); practice (learning as doing); identity (learning as becoming); and meaning (learning as experience). For this reason, we tried to capture the many interrelations of workplace learning that Nielsen and Kvale (2005) emphasise as:

- learning from above (where the master/expert is a role model and responsible for the learner, though they are often inaccessible or away or invisible)
- learning from the person next to you or neighbour learning (involving experienced workers)
- learning from below (where experienced workers may learn from the inexperienced workers)
- learning from the outside (where workers might create “moonlight communities” with workers in other businesses to supplement their workplace learning).

## **2.9 The Evolution of Workplace Learning in South Africa**

### **a) Master and Servants Act**

Both the Natal and Cape of Good Hope regions enacted legislations in the 1880s to train artisans to work mainly in the mines and railway infrastructure (Haywood, 2004). In 1922, these laws, called Master and Servants Acts were replaced by the Apprenticeships Act.

### **b) The Miners' Strike of 1922**

Threatened by the introduction of black workers, white miners embarked on a strike in 1922 demanding protection from cheap black labour. The government of the day violently crushed the strike. The end of the strike resulted in the aptly named Industrial Conciliation Act of 1924. It was an Act that formalised the exclusion of black workers from the bargaining council agreements (Haywood, 2004). A decade and half later the powers that be established the Central Organisation of Central Training to train artisans for the Second World War.

### **c) Black Housing Shortage**

The critical shortage for housing of black workers working in the gold and diamond mines necessitated the building of ghettos and the passing of the Black Building Workers Act of 1951. The National Party had just come to power, in 1948, following a campaign that promised to establish apartheid. This law was one of the signals the apartheid government wanted to use to show its voters it meant business. The Black Building Act did not only provide for the regulation of black builders but also for the regulation of workplace learning for the black builders. But the devil was in the detail. The regulations demanded that black builders must not be certificated for the training they receive to ensure they continue to be regarded as unskilled and deserving of their poor wages (Haywood, 2004).

### **d) The Botha Commission**

Following the victory of the Nationalist Party with the promulgation of the Black Building Workers Act of 1951, apartheid became a policy of government in education and training. Mandated to combat white poverty, the Botha Commission reviewed the existing industrial legislation. The outcome was the new Industrial Reconciliation Act of 1956 that effectively excluded black workers from participating in trade

union activities. It also reserved jobs for whites. In the 70s the law was amended to give powers to the Industrial Council to begin charging employers a compulsory levy (Haywood, 2004).

#### **e) The Manpower Act**

In the wake of the 16 June 1976 Soweto Riots that soon spread to other urban areas, the apartheid government appointed the Wiehahn Commission to investigate South Africa's labour legislation, and the Riekert Commission to explore manpower utilisation and influx control measures (Wiseman, 1986). The recommendations of the Riekert and Wiehahn Commissions led to the promulgation of The Manpower Act (No. 56 of 1981) creating the Manpower Development Fund to capitalise training centres. The legislation also led to the establishment of the National Training Board (NTB), and an incentive scheme for training providers. Even though the Manpower Act removed all references to race, it continued the systemic exclusions of blacks, in general, and black workers, in particular. The Manpower Act was amended in 1988 to clarify the powers of the NTB and establish Industry Training Boards to effectively take over the training of artisans in the workplace.

### **2.10 The Impact of the Apartheid Laws**

Looking at the impact that the laws enacted before and during the apartheid years had on society does not provide pleasant reading. McGrath (1996), Gamble (2004) and later Allais (2012) agreed that the result of these laws (from the 1880s to the Manpower Act of 1981) was low skills production, employer voluntarism, exclusive artisan training for white men through state-owned enterprises and a highly unequal public education system.

The way the apartheid government had been regulating training including workplace learning left South Africa with an elitist, segregated and unequal society where black and coloured people are disproportionately unemployed and redundant as compared to their white counterparts. Employers voluntarily contributed a skills levy to industrial Boards. But the National Training Strategy Initiative (NTSI) suggested that this voluntary enterprise training was selective with workers and discriminated against small and medium-sized enterprises, black workers and especially those with lower levels of formal education. It is a system that begged to be replaced. Adams (2007) remembered the conditions very well:

*'On grounds of equity, if not efficiency, these conditions of employment provide a rationale for public interventions to broaden access and investment in education and skills for those left behind by enterprise-based training. These interventions may include public provision, but also public financing of private providers, including training by enterprises.'*

For many like Adams these egregious conditions needed a new agenda to address the changing nature of demand for high level skills in a manner that promotes equity, access and inclusivity.

## **2.11 Policies and Strategies of Workplace Learning in South Africa**

The pedagogical concepts and challenges of workplace learning, co-operative education, or experiential learning are familiar to South African vocational education practitioners (Engel-Hills *et al*, 2008) and are used in many organisational learning management and mentoring systems, including those of retail corporates (Akoojee *et al*, 2005). 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.

### **a) 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 workplace implementation, for vocational qualifications.

During this period, little published evidence indicates that higher education institutions evaluated the effectiveness of their workplace learning 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 workplace 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 workplace learning programmes, and assessing students' mastering of required learning outcomes.

The Council on Higher Education (CHE) Workplace 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 workplace learning is not restricted to work placement. There are many different workplace practices, along a continuum from theoretical to more practical forms. When workplace learning includes workplace exposure, the intention is to encourage students to reflect on their experiences, to develop and refine their own understanding and capabilities.

#### **b) The National Skills Development Strategy III Progress Report**

(Republic of South Africa 2013) reflects critically on several goals related to the achievement of effective workplace learning, 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 workplace learning policy and strategic reviews have reflected the need for enhanced implementation and functionality, including:

- **Framework for providing workplace Learning in Technical and Vocational Learning** (Swiss-South African Co-operation Initiative 2013), which identifies seven ‘core business’ guiding principles for effective workplace learning planning and implementation by colleges and universities.
- **Department of Higher Education and Training (DHET) Draft Framework for Providing workplace learning in TVET Colleges** (Republic of South Africa 2013a); which includes a DHET draft policy context, guiding principles, types of workplace learning, implementation processes and specified roles of stakeholders.
- **Fact Sheet on Workplace Learning** (SA Board for People Practices 2014) which includes descriptions of various types of workplace learning, benefits for employers, principles for successful planning, co-ordination and implementation; and key workplace learning roles for private sector training providers, as well as post-school educational institutions.
- **Towards a Policy Framework for Workplace 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 workplace learning 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 workplace learning”.
- **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 workplace learning 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 (NDP) and National Skills Accord (NSA) 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 workforce, through institutional regulatory frameworks for occupationally-directed learning programmes which promote effective workplace-based skills development.

## **2.12 Overview of the Wholesale and Retail Industry in South Africa**

Wholesale and Retail in South Africa is regarded as a significant sector of the economy and a major employer. It is the fourth largest contributor to Gross Domestic Product (GDP) with a contribution of about 15% and employs about 22% of the total active workforce of the country (W&RSETA, 2017). Statistics South Africa Quarterly Employment Statistics for September 2015 reported an annual increase of 1% (Statistics SA, 2018), although COSATU analyst Coleman (2012) and SACCAWU officials (Kotze and Gumede, 2013) have expressed doubt regarding the accuracy and reliability of wholesale and retail trade employment data.

According to the W&RSETA website and comprehensive 2011-2016 Plan (W&RSETA 2016), recent data trends indicate retailing is ‘one of the least transformed sectors in the economy’; and that permanent employment within the sector as a percentage of the total South African workforce has been decreasing, from a high of 27% in 2001, to 22% in 2010. This suggests that the practice of periodic employment of casual staff is increasing, aligned with projected peak retail sales periods.

The W&RSETA 2011-2016 Sector Skills Plan (2016) notes that the highest densities of wholesale and retail enterprises are found in the Gauteng, KwaZulu-Natal and Western Cape provinces. Together, these provinces make up 76% of the total national workforce of the Wholesale & Retail sector. Significantly, the Sector Skills Plan notes that about 87% of the number of businesses in the W&R sector are small enterprises, compared with 9.5% medium and 4.5% large corporate enterprises; and that only 65% of businesses in the W&R sector are formally registered; there are over 100 000 informal traders in the sector, with an estimated annual sales turnover of R7 billion; making up approximately 10% of total national retail sales.

### **2.13 Socio-Economic Significance of the Wholesale and Retail**

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

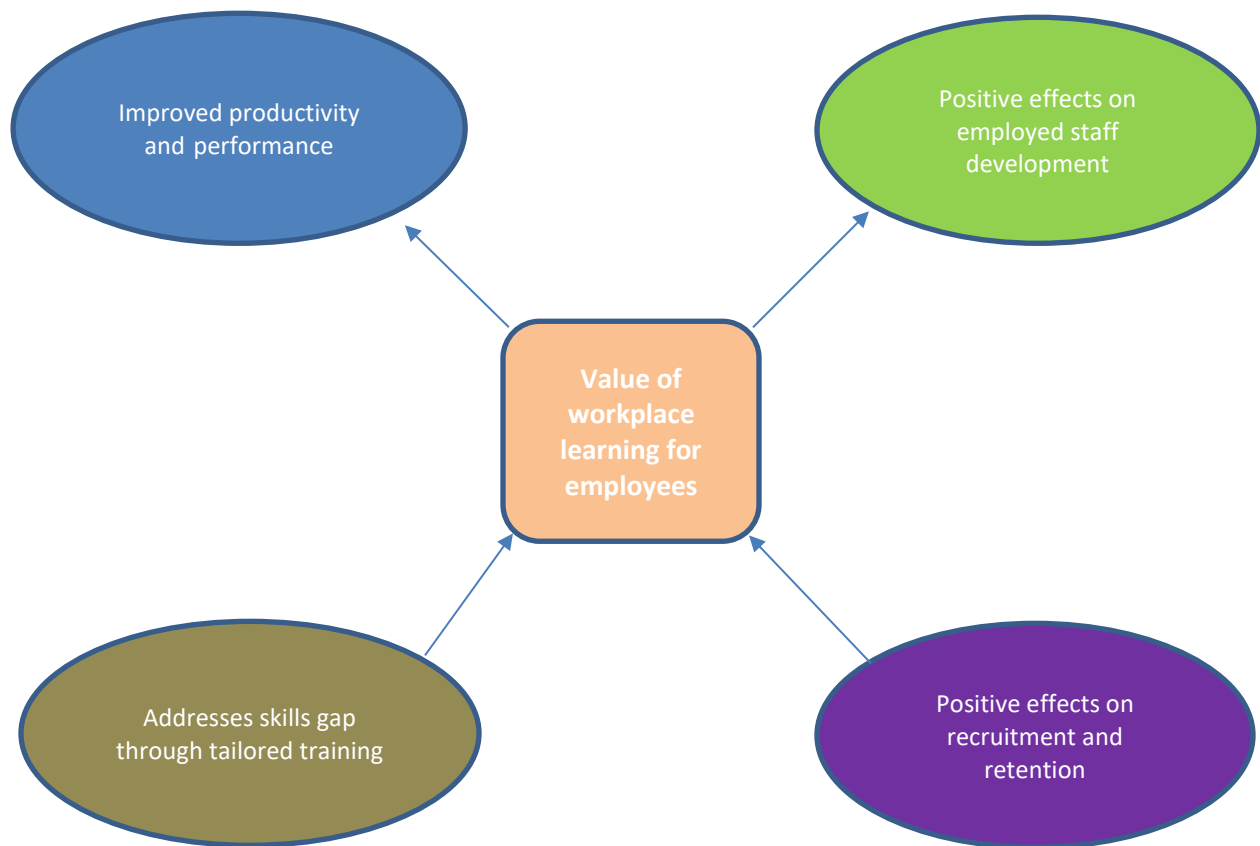
The NDP (Republic of South Africa, 2015) projects that by 2030, about 70% of South Africa's population will live in urban areas; that 90% of new jobs would be created by SMMEs; and that about 79% of SMMEs would be in the retail sector. The W&R Sector Skills Plan (W&RSETA, 2014) indicates that highest 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.

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%). This data reflects the workplace dominance of large retail corporates.

## 2.14 The Value of Workplace Learning

Learning should be more than getting qualifications. It should be an attempt to take “work” beyond the repetition of everyday tasks to engagement with increasingly more complex tasks or tasks with a higher measure of accountability. To do this, workplaces should carefully combine and sequence routine and non-routine tasks to create problem-solving challenges and rich learning experiences (Billett, 2001) so that learners could move from peripheral to full participation. In this sense, the wholesale and retail workplaces can be understood as a “landscape of learning” (Nielsen and Kvale, 2005).

The value of workplace learning is summarised in Figure 2 below:



**Figure 2: The Value of Workplace Learning**

**a) Improved productivity and performance**

Workplace learning raises productivity and innovation within participating firms. Whilst workplace learning programmes involve an initial investment by employers, this pays off later on. The final phase when trainees are more productive than they cost is essential since it allows employers to recoup their initial costs. More importantly, the skilled trainees achieve higher productivity and contribute to production. However, the scope for learning through productive work does vary across occupations. An electrician must undertake substantial training before engaging in 'productive work', in comparison to a retail assistant for example. But whenever possible, learning should take place as part of productive activities and rigorous assessments at the end of the scheme can verify that learning has taken place.

**b) Staff development**

Obviously, workplace learning programmes produce a pool of skilled staff with the potential to be promoted into more senior roles in future years. However, the positive effect on staff development extends beyond the direct participants. For example, in-company trainers responsible for training/mentoring, learners benefit by developing their skills and competences as trainers; but also by developing new knowledge, since learners bring new perspectives and challenges as they learn. The people who interact with trainees are not only those designated as formal trainers but many more people in a host company who take on training and mentoring tasks. This broad engagement of staff enhances the organisational learning in a company.

**c) Recruitment and retention**

Apprenticeships and other workplace learning programmes can reduce labour turnover since those who have benefitted from such training are more likely to stay at the firm. This is particularly the case for firms in which other key factors (such as the structure and organisation of work, employee relations and wage structures) all interact to promote learning-rich work. Well-developed in-house training programmes also help to develop the company's values and ethos, which in turn increases the connection between employees and their employers.

#### **d) Addressing skill gaps**

For employers, workplace learning represents an important tool to react in a flexible, efficient and concrete way to the needs of the company by developing tailored programmes which address specific skill gaps.

### **2.15 Methods to Design and Harness the Value of Workplace Learning in Wholesale and Retail**

Introducing work-based learning and ensuring its sustainability and lasting positive impact requires the same kind of thought and planning as any other new program. While each workplace learning program must be customized to the particular structure and priorities of a company, several themes are critical to program success. Designing and harnessing successful the value of workplace models for retail requires that corporate leadership mobilized internal and external commitment and resources and are integrated into a culture that embraces advancement with clear career pathways.

Successful workplace learning experiences in retail are also bolstered by formalized mentorship for participants and more broadly leverage the strengths of external partners. These partnerships are critical in that they allow the company to focus on what they do best—providing a workplace setting for learning— while the partner can provide classroom training and wraparound supports for participants. Finally, all of this can be measured so that adjustments can be made and successes can be celebrated.

#### **a) Support at the organisational level**

Behind each thriving work-based learning program is a committed team of corporate leaders. Firstly, learning should be prioritised through policies and structures. These should not merely be written documents; they should be “made practical” through having a dedicated person with the interest and authority to promote learning in the workplace. An important part of that role must involve creating opportunities that learners could take up as “affordances” to really learn. Support should also occur through the provision of quality resources. The workplaces should provide learners with workbooks and guides that are pitched at, and adapted to, the level of the learner. They must also be provided the key resource of time. This means that learning should not be routinely pushed aside when other things appeared to be more important.

The wholesale and retail workplaces should have organisational level support through mechanisms to reward learning success. Mechanisms should range from public recognition, such as graduation ceremonies, to invitations to participate in more concrete problem-solving with other experts, to development of career pathways, to informal acknowledgement of a “job well-done”.

**b) Have structured orientation to the job**

Learners in Wholesale and Retail workplaces should work with a clear awareness of a learning structure at work and clear expectations about how that learning fitted with their job. People must never be “dropped” into their roles. Instead they should be given time to settle in. They should often be paired with a buddy who could guide them. Learners will become engaged in the process of starting work and structured learning, and knowing what questions to ask, who to ask them of and when to ask.

**c) Providing quality resources**

Workplaces should provide learners with workbooks and guides. Workplaces can also use DVDs illustrating models of good practice, e.g. Standard Operating Procedure (SOP) manuals. The SOP manuals must be created by the training manager who has tested the equipment first-hand and then, with input from some of the experienced workers, adapted instructions, added diagrams and created learner-specific content (e.g. questions to consider and short tests). Notably, although instruction manuals from the equipment manufacturers are available, site-specific manuals should be produced especially for the novice learners.

These workbooks could be used by groups of learners working together in class, as well as taken home and re-read by individual learners. The trainer should carefully explain where the workbooks had been adapted and why some new pages had been inserted that were specific to the company’s protocols. The trainer should make use of the actual materials that workers used in their daily work. Thus, learners can be able to develop both a theoretical and literal hands-on understanding of the “tools of their trade” and the situations in which they could be used. The most well-designed training materials must be clear and inviting. They should use plain English and have helpful charts and diagrams. The resources must therefore be well-pitched at the levels of most learners, to make independent learning feasible.

One of the most important resources to be provided to learners is time. Learning should be kept at the forefront of an organisation's mission, the times when learning is interrupted to meet other (work) demands must be kept to a minimum. In other words, learning must not be routinely pushed aside when other things appeared to be more important; instead, learning should be prioritised.

**d) Prioritize partnerships**

Many employer-led workplace learning programs partner with community-based organizations, TVET colleges, or other institutions of higher learning to provide initial training and the support services participants require to complete the program. The kind of partner selected depends on the type of program being supported. Many companies select non-profits that have a proven track record in youth employment training and placement and who are also committed to using data and evaluation for continual improvement. Other companies may use their workforce board or state agencies such as vocational rehabilitation to provide the support required.

**e) Collaborate to develop workplace learning models**

Employers should partner with each other to lead sector strategies that have better equipped their regional workforces with their most in-demand skills. Retail employers can benefit from similar collaboration. By establishing a baseline set of the skills required to be effective employees in critical occupations, retailers can improve the relevant offerings of local community-based organizations, or they can combine to create sufficient demand for new programs. Beyond this core training offered to cross employer cohorts, the portion of a workplace learning program that is housed in the workplace can include whatever proprietary information is needed for job success. In addition, retailers should consider working with trade associations to build consistency for both employers and employees. This standardization would make it easier for external training providers to provide turnkey training solutions.

**f) Develop and use industry-valued credentials**

The retail sector does not yet enjoy a shared language around workplace learning that can provide a more uniform approach to career pathways. In retail, advancement tends to be a less structured system than is found in other more technical industries, such as health care and advanced manufacturing. Many

industries have developed significant credential frameworks to identify talent pools from which multiple employers recruit and promote. These credentials ensure consistency in the quality of the most valued skills and knowledge.

There have been a few attempts by the retail industry to design credentials. In fact, the NRF Foundation began the process of identifying industry standards and subsequent certifications in the generic area of customer service and sales in the early 1990s with support from the Department of Labour. This was the first time the industry was asked to quantify skills to develop a certification that would be of recognized value for hiring entry-level workers. The NRF Foundation worked with a good number of large and small retailers to ensure technically sound standards and certification.

The initial customer service certification was supported and recognized by those companies that were close to the development process. The use of standards-based training and certification was successfully tested and found valuable for hiring entry-level workers in retail and related businesses. The certification also proved of value in recognizing achievement in secondary and postsecondary marketing education programs, often enabling students to receive credit for attaining the certification. However, the certification as a tool in hiring was inconsistent across the industry and did not move to scale.

It is difficult to tell if the program got the kind of industry adoption that is required to integrate these skills and competencies into the retail industry. However, it is clear that to be meaningful for both employees and employers, retailers need to support these credentials by preferring to hire and promote those who have them and encouraging educational institutions and community-based organizations to train to the specifications.

**g) Use good teaching strategies to support structured learning activities**

The workplaces should have a clear idea of the skills and practices they want their learners to develop and they must not leave the teaching to chance. Although some teaching strategies should be in common with other sectors, the whole and retail sector should also differ in the emphasis given to formal learning in classes and to learning 'on-the-job'. With formal learning in classes, the teacher approach should support meaningful learning through:



- Clear expectations and processes (e.g. lesson purposes and intentions written up for everyone to see; teachers conveying the norms of practice that learners would join)
- Learner-to-learner and tutor-to-learner interaction (e.g. teachers built social connection with learners; peer learning culture should be encouraged; feedback must be given during learning activities)
- “Real” learning (e.g. teachers must activate learners’ current knowledge and link it to new learning; teachers must develop learners’ understanding, rather than simply “covering” the material)

#### **h) Identify and promote your retail career pathway**

For workplace learning programs to be effective, participants need opportunities to apply the skills they have learned at work, be able to demonstrate proficiency and be rewarded for doing so. Companies that have an internal culture of advancement offer those possibilities. But it is not enough to have a policy on promoting from within—employees should know how to advance and understand that there is a career pathway for them. Companies that embrace a role as a career developer by offering continued training and advancement opportunities also create a higher-value employee and proactively grow their next generation of leaders. To keep good talent and maintain diversity in the workforce, advancement opportunities must be widely advertised through multiple channels.

#### **i) Include mentoring in the workplace learning model**

New entrants to the workforce often need additional guidance that supervisors are reluctant or don’t have time to provide. Mentoring offers numerous benefits to both mentor and mentee, including broadening staff insight into the business and providing relationships. Mentees often learn and develop faster by encouraging an exchange of information that doesn’t always exist naturally, enhancing the mentees’ performance. Mentoring programs let employees know that the company values them and has an interest in their personal development, leading to increased productivity and reduction in turnover. These relationships often help the mentee see what kinds of career possibilities exist in the organization.

Beyond formal mentorship, managers need to be supportive of employees and their work-based learning activities. Studies have confirmed that people stay (or leave) their jobs because of their managers. This suggests that frontline supervisors must promote making retail a career. These brand ambassadors need to be attuned to the immediate training needs and opportunities for their employees and be well versed in the career pathway that is offered by an employer. The company must also recognize this staff development as part of a supervisor's job responsibilities and reward them for facilitating formal and informal work place learning.

People learn while engaged in their work. The wholesale and retail should specifically organise workplaces so that work is visible, talked about and “unpacked” for novices. Vygotsky (1978) first introduced the concept of the “zone of proximal development” for learning. Learning from and with others happens best in this zone, where tasks are neither too easy for the learner (this leads to boredom) nor beyond their capabilities (this leads to frustration). Within the zone of proximal development, learners are given the support they need to accomplish tasks that they could not do on their own. This support is called scaffolding.

The expert, when scaffolding the learning of a less-experienced person, judges when it is the right time to start dismantling the scaffolding, leaving some of the task for the learner to accomplish on their own. As the learner demonstrates their increased capability over time the expert progressively removes their scaffolded support until the novice can handle the whole task independently. During the scaffolded learning, the expert provides formative feedback and guidance and when the learner is independently able to achieve the task or activity, they are summatively assessed. The role of the expert in assisting novices to learn from experience is as important as that of the tutor in a more formal teaching context. The expert practitioner also has to have a deep content knowledge of the work so that they can guide learners in acquiring the essential knowledge and skills required for successful learning.

Helping people learn from experience requires specific mentoring skills. At its broadest, mentoring in the workplace is simply a person-to-person form of informal support for the learner. Helping others learn can occur “naturally” between workers but is more likely to become integral to workplace learning when the workplace climate tangibly supports learning and promotes supportive relationships between workers. Formal mentoring is a structured version of guided learning at work and is associated particularly with

enculturation, employee retention, learning tacit knowledge (the “tricks of the trade”) and fostering the move from peripheral to full participation in communities of practice. It is particularly important to employers who consider that good workplace performance requires more than the completion of qualifications. In addition to completion of qualifications each workplace had its own approach to “how we do things around here” and formal and informal mentoring was used to support new workers to gain access to this knowledge.

## **j) Measure results**

What gets measured, matters. Large companies often introduce new initiatives that are to be integrated into the organization’s operations. These initiatives are often announced with great fanfare—posters are printed, coffee mugs are handed out, but then they fade into memory if they do not become part of the metrics by which managers are evaluated. Workplace learning is no different. Workplace learning metrics need to be embedded into the metrics for the leaders closest to where workplace learning is being implemented. Senior leadership can endorse the idea and encourage all managers to adopt workplace learning, but unless they are convinced of the efficacy and measured on the implementation, the program will not be adopted.

- **Formative assessment**

Formative assessment should be ongoing within each workplace, as part of formal and informal mentoring. Through this, learners will have many opportunities to get feedback on all aspects of their work, including their progress towards gaining specific unit standards and qualifications. Learners should be encouraged to understand the process of gaining a qualification and to share responsibility for their own progress towards this qualification.

- **Summative assessment**

Summative assessment occurs when an assessor makes a judgement as to whether the learner has met specific unit standards. When the learner is able to meet the SOP standard, they should be formally assessed by someone from another unit on the appropriate unit standard. This type of on-job assessment, to be valid and reliable, is dependent on the content knowledge and assessment skills of the assessor. It

is in a different league to the “tick-off” approach that less-experienced or less-knowledgeable assessors may use.

#### **k) Share what you are doing**

Workplace learning in retail is just gaining momentum. Companies with strong programs in place are the best champions to promote the adoption of workplace learning by other retailers. Only a handful of companies have fully developed models that they believe are sufficiently vetted to share with others. In other cases, companies feel their models contain too much proprietary information to be shared. Yet companies often start by looking to their peers for business solutions. At this moment for the field, it is clear that the industry recognizes a value in training workers, but we do not know much about the underpinnings, foundational structure, or origins surrounding most models. Consequently, the bulk of existing data relies on employer claims versus qualitative assessment or in-depth analysis.

To build these models out, employers must be willing to share their models and evidence to support their results so that we can learn from each other’s experiences and better the field as a whole.

## **2.16 Conclusion**

Globally, business leaders consistently rank finding and keeping talent as one of their top priorities. Historically, it was thought that CEOs and their talent officers were referring only to more senior staff. However, as unemployment rates increases and the magnitude of the skills gap becomes clearer, finding and keeping talent at all levels becomes more of an imperative. This change in attitude can be seen clearly in the retail sector. Retailers are faced with a tightening labour market that shrinks the available labour pool along with rapid changes in their business models. They are searching for proven models to help increase sophistication in preparing and developing their workforce. Retail employers can capitalize on proven workplace learning or “earn-and-learn” strategies that work in other industries, as well as test innovations of their own.

A coordinated approach to workplace learning can ultimately have an impact that reaches far beyond the retail sector. Corporations spend a lot of money annually on employee training. That investment, if better targeted to the populations and strategies that can best serve business imperatives, can transform the

talent pipeline and skilled workforce not only in retail, but across our economy. This section looked at the benefits of workplace learning for employers and workers and how work-based learning lessons and examples can work for retail.

# SECTION THREE: RESEARCH DESIGN AND METHODOLOGY

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## 3.1 Introduction

In section one an orientation of the research was provided. This chapter strives to operationalise the theme of the research design and methodology for the study, as well as to substantiate the choices made in conducting the study. The research design is applied so that suitable research methods are used to ensure the attainment of the goals and objectives set out in section one. This research is focused on understanding the respondent's views and perceptions in determining methods of designing and harnessing the value of workplace learning for Wholesale and Retail.

## 3.2 Research Design and Methodology

The design of the research study was of a qualitative nature. When a research study has the objective to build understanding and explore certain phenomena, it is considered as qualitative research and requires qualitative research methods in order to meet such objectives. Such methods to conduct qualitative research include the researcher performing in-depth interviews, document analysis and/or observing participants (Davis, 2014b and Nieuwenhuis, 2016).

This is an exploratory research based mainly on insights drawn from the analysis of the existing literature of different studies, reports, periodicals and books related to the topic of study in order to determine methods to design and harness the value of workplace learning in Wholesale and Retail. This research work will serve as a means to help acquire useful information or knowledge about the subject area. By drawing on the existing literature, not only the topic under consideration is theorized, but also the understanding the value of workplace learning for and Retail is formulated and discussed.

To achieve an increased understanding of how workplace learning is currently operating in and can continue to impact the retail industry, Dedosa Consulting (Dedosa) approached the research study from multiple angles. We conducted a comprehensive literature review to get an accurate scan of the state of the field and took a deeper dive into current outlooks for retail workers with labour market information

analysis. We then field-tested what we were finding with three focus group sessions. We conducted the focus group sessions to hear first-hand people's experiences with workplace learning. We approached the focus group with the idea to confirm what we were learning from the literature review but also to identify any new insights from these practitioners. The focus groups sessions were held with retail stakeholders in GP, KZN and WC.

### **3.3 Research Instruments**

A mixed research methodology was used to collect data. These included:

- Literature review (desktop research), and
- Focus group sessions.

The research methodology entailed document analysis and focus group sessions to gather data from a small sample size. The sessions had a few participants from stakeholders in the retail sector, but we were able to receive many responses from different individuals. With the utilisation of such research methodology, the researchers were able to gain an in-depth understanding of the phenomenon, which is the essence of qualitative research.

#### **3.3.1 Literature and Document Review**

Literature review justifies the research and provides context for conducting a research study. It is a summary and synopsis of a particular area of research, allowing anybody reading the study to establish why a particular research study is being pursued. A good literature review expands upon the reasons behind conducting a particular survey. In summary the purpose of writing a literature review is to:

- Justify the research study
- Ensure you have a thorough understanding of the topic
- Demonstrate the researchers' understanding of the research topic
- Place the research in context
- Give an overview of controversies in past research

### 3.3.2 Focus Group Sessions

Focus group research has traditionally been used as a data collection method which essentially assists the researcher with collection of qualitative data. The method involves engaging a small number of people in an informal group discussion, focusing on a particular topic or a set of issues, (Onwuegbuzie, et al, 2009). This method of data is applied in collecting data from multiple individuals simultaneously. In this form of research, participants are allowed to participate in a non- intimidating manner by spelling out rules of engagement and allowing all participants to feel at ease. This is helpful in ensuring that participants are able to discuss perceptions, ideas, opinions and their thoughts openly.

Dedosa formulated a list of participants from the research participants on the previous studies commissioned by W&RSETA. We then set dates for meetings and venues. Finally, we developed focus group questions. On the day of the sessions we spelled out the process of how the focus group sessions will be conducted, including: research topic, length of focus group sessions, rules of engagement with and among participants.

According to Krueger and Casey (2000), the advantages of using focus group sessions include:

- Capturing participants responses in real space and time on face-to-face interactions
- Being able to strategically prompt questions and further discussions based on the responses that are generated in these face-to-face interactions and that are considered particularly important to the researchers
- Focus groups are an economical, fast and efficient method for obtaining data from multiple participants
- The focus group environment is socially oriented, thereby potentially increasing the overall number of participants
- The sense of belonging to a group can increase the participants' sense of cohesiveness while allowing the participants to feel safe to share information openly
- Interactions that occur among the participants can yield important data, while creating the possibility for more spontaneous responses
- Focus group sessions provide a setting where the participants can discuss problems and challenges they face and come up with possible solutions.



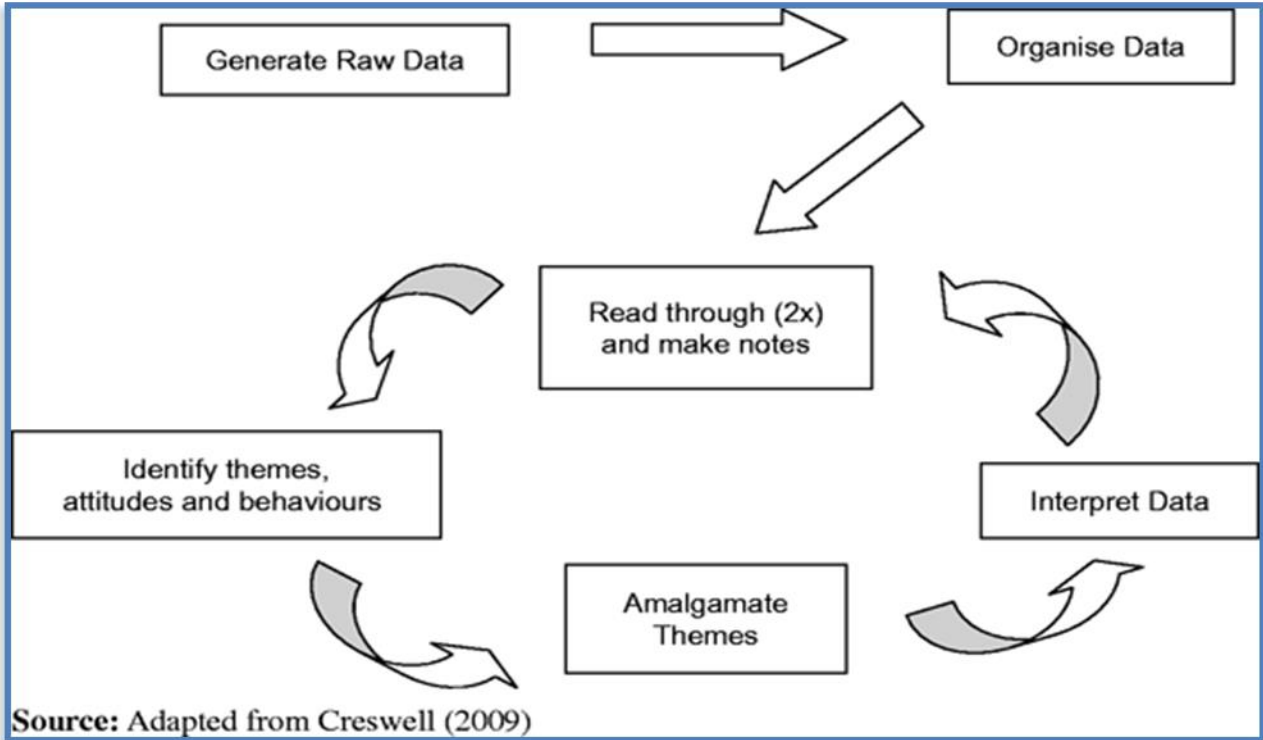
### **3.4 Coding and Data Analysis**

As posited by Gummesson (2002), one burdensome task with all research is not to collect or rather generate more data, but to interpret and combine what is already there and make some sense out of it. We submit to this assertion and try to make the most out of the insights we can get from the existing literature to address the phenomenon under study.

The research study utilised the qualitative data analysis method of thematic analysis. This was owing to the nature of the data collection method being document analysis/ personal interviews/focus group sessions of a small population. The data analysis occurred through the use of thematic analysis, which was used in order to extract the themes embedded in the answers provided by the participants. Thematic analysis of the data occurred using Braun and Clarke's six steps of thematic analysis (Braun and Clarke, 2006).

This process involved the generation of codes to the information evident in the transcript of the interview. After the initial codes were generated, similar and repetitive codes were eliminated and consolidated. The final codes were then consolidated and developed into the final themes and sub-themes evident in the findings from the interview. Applicable quotes were then allocated to each theme and sub-theme of the findings. These quotes were used as the evidence of the findings in the presentation of findings (Braun and Clarke, 2006).

Coding is an analytical process in which data, in both quantitative form (such as questionnaires results) or qualitative (such as interview transcripts) is categorized to facilitate analysis. Iain Hay (2005) outlines a two-step process beginning with basic coding in order to distinguish overall themes, followed by a more in depth, interpretive code in which more specific trends and patterns can be interpreted. Initial coding included many categories. All raw data that was identified as usable was included. The codes were reduced and refined several times to codes that were mutually exclusive as follows:



**Figure 3: Data Coding Spiral**

All qualitative data analysis involves the same four essential steps:

- Raw data management- ‘data cleaning’
- Data reduction, I, II – ‘chunking’, ‘coding’
- Data interpretation – ‘coding’, ‘clustering’
- Data representation – ‘telling the story’, ‘making sense of the data for others’

Memos were created during the coding process as this is integral in the process. The researcher used qualitative research because it is inherently reflexive; as it allows the researchers to delve deeper into their subject, it is important to chronicle their own thought processes through reflective or methodological memos, as doing so may highlight their own subjective interpretations of data. It was therefore crucial to begin memoing at the onset of research as the process initiated critical thinking and productivity in the research. This facilitated easier and more coherent analyses as the project draws on. Memos can be used to map research activities, uncover meaning from data, maintaining research momentum and engagement and opening communication.

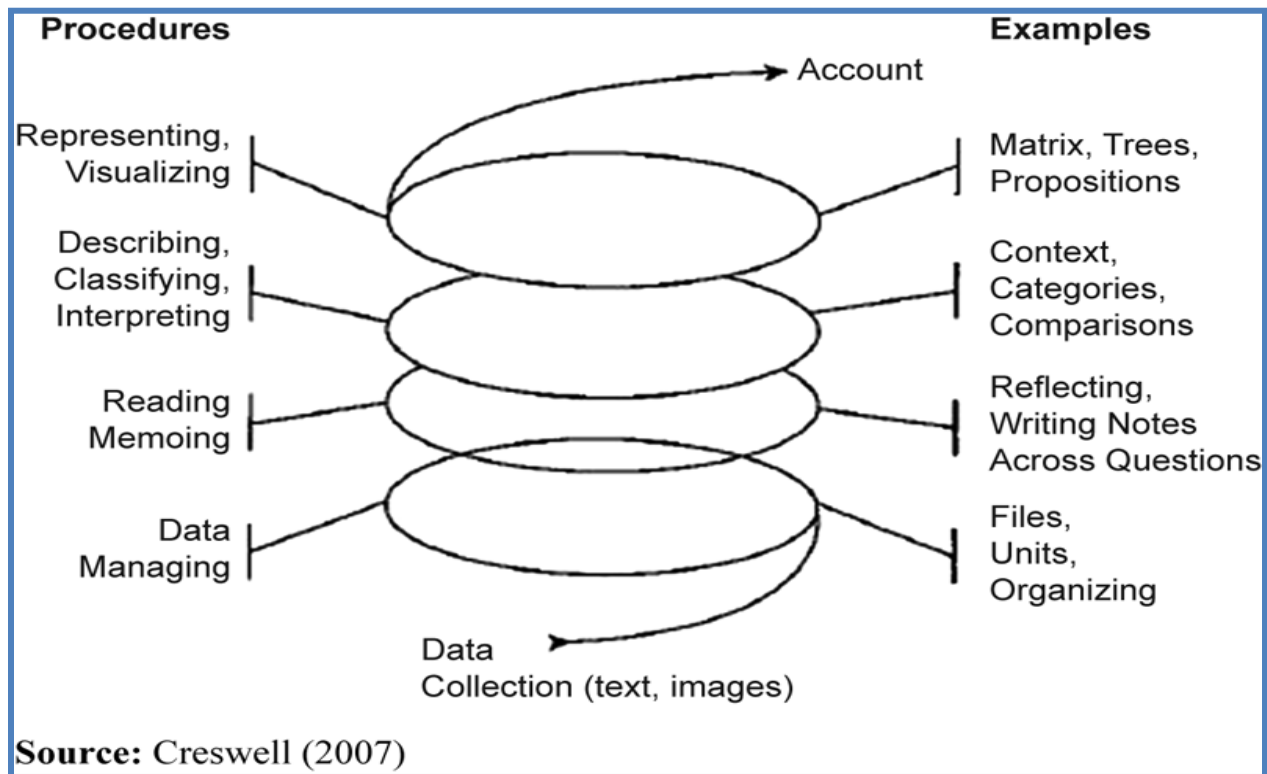


Figure 4: Data Analysis Spiral

The findings are noted within each section of the survey by first explaining the coding developed for that question. This helps to understand the rationale of the coding as well as provide a context for it.

### 3.5 Research Limitations

There are limitations for every research study and this research was no different. The limitations of this research study were identified as follows:

- This researcher may not be able to access the people needed to do the research and may have to develop alternative contacts.

In reality this was not an issue for this researcher, as there was a satisfactory number of volunteers that participated in the research.

- Due to time constraints the researcher may not be able to find enough people for focus group sessions and they may not be able to be interviewed for the required amount of time. If this does not go to the timing schedule, there may be a need to shorten or lengthen interviews or use conduct telephone interviews.

However, this was not an issue, because the light-hearted and casual nature of the conversations on most occasions meant that all participants were satisfied with the timing of the interviews.

- As the study is qualitative, not quantitative, the results cannot be generalised. Only a small number of respondents were surveyed; thus, the study was prudent in the final claims made as they were tied to a specific context.
- A large amount of data was captured and analysed.

## SECTION FOUR: RESEARCH FINDINGS

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### 4.1 Introduction

To achieve an increased understanding of how workplace learning is currently operating in and can continue to impact the retail industry, Dedosa approached our research from multiple angles. We conducted a comprehensive literature review to get an accurate scan of the state of the field and took a deeper dive into current outlooks for retail workers with labour market information analysis. We then field-tested what we were finding with case study analysis/personal (face-to-face) interviews /three focus groups with three of our employer partners. This section presents the main findings of the survey through data collected from case study analysis or personal (face to face) questionnaires or focus group sessions.

### 4.2 Findings from Document Analysis/Literature Review

Based on the collection and analysis of results of studies, reports, periodicals and books related to the topic of study the researchers found that introducing work-based learning and ensuring its sustainability and lasting positive impact requires the same kind of thought and planning as any other new program. While each workplace learning program must be customized to the particular structure and priorities of a company, several themes are critical to program success. Designing and harnessing successful the value of workplace models for Wholesale and Retail requires that corporate leadership mobilized internal and external commitment and resources and are integrated into a culture that embraces advancement with clear career pathways.

Successful workplace learning experiences in retail are also bolstered by formalized mentorship for participants and more broadly leverage the strengths of external partners. These partnerships are critical in that they allow the company to focus on what they do best—providing a workplace setting for learning— while the partner can provide classroom training and wraparound supports for participants. Finally, all of this can be measured so that adjustments can be made and successes can be celebrated.

The researchers summarised the methods for designing and harnessing the value of workplace learning for Wholesale and Retails as follows:

**a) Support at the organisational level**

The Wholesale and Retail workplaces should have organisational level support through mechanisms to reward learning success. This is because behind each thriving workplace learning program is a committed team of corporate leaders. Mechanisms should range from public recognition, such as graduation ceremonies, to invitations to participate in more concrete problem-solving with other experts, to development of career pathways, to informal acknowledgement of a “job well-done”. Wholesale and Retail should also prioritise learning through policies and structures. These should not merely be written documents; they should be “made practical” through having a dedicated person with the interest and authority to promote learning in the workplace. An important part of that role must involve creating opportunities that learners could take up as “affordances” to really learn.

**b) Have structured orientation to the job**

Learners in Wholesale and Retail workplaces should work with a clear awareness of a learning structure at work and clear expectations about how that learning fitted with their job. People must never be “dropped” into their roles. Instead they should be given time to settle in. They should often be paired with a buddy who could guide them. Learners will become engaged in the process of starting work and structured learning and knowing what questions to ask, who to ask them of and when to ask.

**c) Providing quality resources**

Wholesale and Retail should provide support to the learners through the provision of quality resources such as workbooks and guides. They can also use DVDs illustrating models of good practice, e.g. SOP manuals. The workbooks and guides should be pitched at, and adapted to, the levels of most learners to make independent learning feasible. Learners must also be provided the key resource of time. Learning should be kept at the forefront of an organisation’s mission, the times when learning is interrupted to meet other (work) demands must be kept to a minimum. In other words, learning must not be routinely pushed aside when other things appeared to be more important; instead, learning should be prioritised.

**d) Prioritize partnerships**

The Wholesale and Retail can use this model to design and harness the value of workplace learning by partnering with TVET colleges around the country to provide the support required. Many employer-led workplace learning programs partner with community-based organizations, universities, or high schools to provide initial training and the support services participants require to complete the program. The kind of partner selected depends on the type of program being supported. Many companies select non-profits that have a proven track record in youth employment training and placement and who are also committed to using data and evaluation for continual improvement. Other companies use their workforce board or state agencies such as vocational rehabilitation to provide the support required.

**e) Collaborate to develop workplace learning models**

Retail employers can benefit from partnering with each other to lead sector strategies that have better equipped their regional workforces with their most in-demand skills. By establishing a baseline set of the skills required to be effective employees in critical occupations, retailers can improve the relevant offerings of local community-based organizations, or they can combine to create sufficient demand for new programs. Beyond this core training offered to cross employer cohorts, the portion of a workplace learning program that is housed in the workplace can include whatever proprietary information is needed for job success. In addition, retailers should consider working with trade associations to build consistency for both employers and employees. This standardization would make it easier for external training providers to provide turnkey training solutions.

**f) Develop and use industry-valued credentials**

The retail sector does not yet enjoy a shared language around workplace learning that can provide a more uniform approach to career pathways. In retail, advancement tends to be a less structured system than is found in other more technical industries, such as health care and advanced manufacturing. Many industries have developed significant credential frameworks to identify talent pools from which multiple employers' recruit and promote. These credentials ensure consistency in the quality of the most valued skills and knowledge.

Wholesale and Retail should quantify skills to develop a certification that would be of recognized value for hiring entry-level workers. The retail sector then needs to support these credentials by preferring to hire and promote those who have them and encouraging educational institutions such as TVET Colleges to train to the specifications.

**g) Use good teaching strategies to support structured learning activities**

The Wholesale and Retail should have a clear idea of the skills and practices they want their learners to develop and they must not leave the teaching to chance. Although some teaching strategies should be in common with other sectors, the whole and retail sector should also differ in the emphasis given to formal learning in classes and to learning 'on-the-job'. With formal learning in classes, the learning approach should support meaningful learning through:

- Clear expectations and processes (e.g. lesson purposes and intentions written up for everyone to see; teachers conveying the norms of practice that learners would join)
- Learner-to-learner and tutor-to-learner interaction (e.g. teachers built social connection with learners; peer learning culture should be encouraged; feedback must be given during learning activities)
- “Real” learning (e.g. teachers must activate learners’ current knowledge and link it to new learning; teachers must develop learners’ understanding, rather than simply “covering” the material)

**h) Identify and promote one’s retail career pathway**

For workplace learning programs to be effective, participants need opportunities to apply the skills they have learned at work, be able to demonstrate proficiency and be rewarded for doing so. The Wholesale and Retail should have an internal culture of advancement that offer those possibilities. But it is not enough to have a policy on promoting from within—employees should know how to advance and understand that there is a career pathway for them. The Wholesale and Retail should embrace a role as a career developer by offering continued training and advancement opportunities to create a higher-value employee and proactively grow their next generation of leaders. To keep good talent and maintain diversity in the workforce, advancement opportunities must be widely advertised through multiple channels.



**i) Include mentoring in the workplace learning model**

People learn while engaged in their work. The wholesale and retail should specifically organise workplaces so that work is visible, talked about and “unpacked” for novices. Studies have confirmed that people stay (or leave) their jobs because of their managers. This suggests that frontline supervisors must promote making retail a career. These brand ambassadors need to be attuned to the immediate training needs and opportunities for their employees and be well versed in the career pathway that is offered by an employer. The Wholesale and Retail must recognize this staff development as part of a supervisor’s job responsibilities and reward them for facilitating formal and informal work place learning.

**j) Measure results**

What gets measured, matters. Large companies often introduce new initiatives that are to be integrated into the organization’s operations. These initiatives are often announced with great fanfare—posters are printed, coffee mugs are handed out, but then they fade into memory if they do not become part of the metrics by which managers are evaluated. Workplace learning is no different. The Wholesale and Retail need to embed workplace learning into the metrics for the leaders closest to where workplace learning is being implemented. Senior leadership should endorse the idea and encourage all managers to adopt workplace learning, because unless they are convinced of the efficacy and measured on the implementation, the program will not be adopted.

- **Formative assessment**

Formative assessment should be ongoing within Wholesale and Retail. Through this, learners will have many opportunities to get feedback on all aspects of their work, including their progress towards gaining specific unit standards and qualifications. Learners should be encouraged to understand the process of gaining a qualification and to share responsibility for their own progress towards this qualification.

- **Summative assessment**

Retailers should also use summative assessment which occurs when an assessor makes a judgement as to whether the learner has met specific unit standards. This type of on-job assessment, to be valid and reliable, is dependent on the content knowledge and assessment skills of the assessor. Therefore, retailers should invest in it.

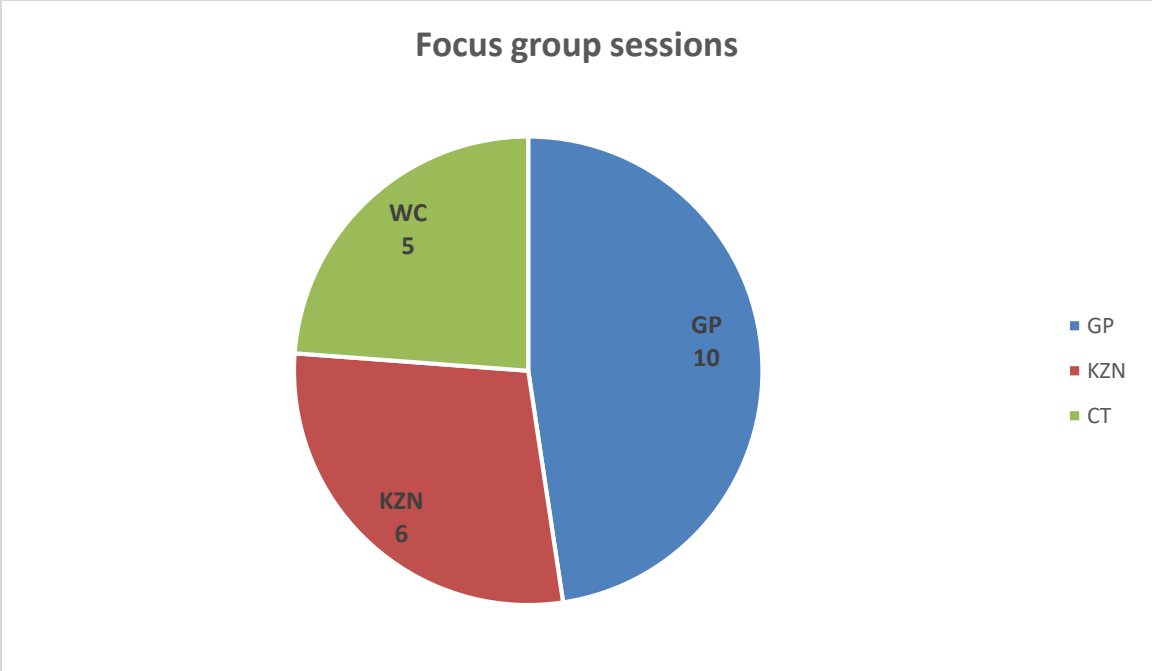
#### **k) Share what you are doing**

Workplace learning in retail is just gaining momentum. Companies with strong programs in place are the best champions to promote the adoption of workplace learning by other retailers. At this moment, it is clear that the industry recognizes a value of workplace learning, but we do not know much about the underpinnings, foundational structure, or origins surrounding most models. To build these models out, Wholesale and Retail must be willing to share their models and evidence to support their results so that they can learn from each other's experiences and harness the value of workplace learning in the sector.

A coordinated approach to workplace learning can ultimately have an impact that reaches far beyond the retail sector.

### **4.3 Findings from Focus Group Sessions**

Dedosa conducted three (3) focus groups sessions with stakeholders in KZN, GP and WC. The focus group sessions consisted of a total of twenty one (21) participants. Of the twenty one (21) participants, six (6) were from KZN, ten (10) were from GP and five (5) were from the WC. Clear rules of engagement were discussed with the group to ensure everyone freely participated without fear of prejudice, exposure or exclusion. All views were allowed and participation by all present was emphasised to ensure that more views were solicited. The researchers ensured that individuals were prompted to give their opinions and views during the focus group sessions.



**Figure 5: Focus Group Sessions**

There were ten (10) questions addressed in the focus group sessions in the three provinces (KZN, GP and WC). Responses to the questions have been summarised as follows:

**4.3.1 Question 1**

***Q1 – Please indicate your views and experience about workplace learning in your current employment.***

Most participants indicated that they all have in-house training opportunities in their current employment. However, they stated that their employers give preference in the form of grants for further learning and/or on the job training for exceptional employees which leaves the average workers out of the programme. They were of the view that the workplace learning is not structured accordingly and therefore, not accessible to everyone. Their experiences, over several years and across various retailers painted a grim reality. Effective learning is, instead, experiential and situated, with (limited) expertise cumulatively developed through doing the job. They then suggested that that in order to address this challenge, employers should set aside policies, time and money.

A few number of respondents stated that their organisations have minimum standards – i.e. a set of basic skills the company requires. Therefore, they afford all employees equal opportunities to access funds put aside money to develop all learners through workplace learning. All employees indicated that they want to be engaged in effective workplace learning — but most companies are simply not equipped to accommodate such needs. One-size-fits-all training programs are not enough to provide an individualized and continuous approach to learning.

#### **4.3.2 Question 2**

##### ***Q2 – Do you think workplace learning is valued by your current employer?***

According to most participants, workplace learning is a success story for the sector. However, some organisations still choose to focus on traditional learning methods and not on empowering employees to acquire new skills through workplace learning. Only a few workers said they have opportunities for growth and learning at their place of work.

They were of the view that the Wholesale and Retail sector need to start realising that great value lies in empowering and up-skilling employees through workplace learning. Workplace learning is a perfect way to develop employees and ensure that workers are equipped to do the work employers need them to do. Additionally, employers should invest in learnership which is a vocational and educational training programme that links structured learning and work experience in order to obtain a registered qualification. This will ensure that the theory is combined with workplace practice into qualifications registered by the National Qualifications Framework (NQF).

#### **4.3.3 Question 3**

##### ***Q3 – Based on your familiarity with Wholesale and Retail sector, do you think workplace learning is valued in the industry?***

Most participants indicated that the industry truly recognize the value of workplace learning as employers agree that it helps in job effectiveness. However, a few respondents believed that a shocking high number of employees receive zero formal on-the-job training. What's worse? They said for those who receive it, it has proved to be ineffective as only a select few move through the ranks. They indicated that, because of this, they just disengage. They argued that it should come as no surprise that poor work quality, lower

productivity, and customer satisfaction is always an issue. They then suggested that employees need workplace learning to be fun, easy and a seamless part of their day-to-day. They stated that the attention span of an average person does not coincide with sitting in long, mundane training sessions. Therefore, receiving the right training to perform their jobs is of utmost importance.

Other participants stated that workplace learning is not receiving enough support from employers. This is besides the fact that in today's climate, workplace learning is crucial for retail to enable its workers to develop their individual strengths which will positively impact their job success — and therefore, the declining retail's bottom line.

Some participants also highlighted the need to reconsider vocational training as this is a critical piece of the skills puzzle as it can help to deliver key skills required by Wholesale and Retail." For vocational training to play a meaningful role in solving skills shortages and unemployment, there needs to be better alignment between the TVET system and the practices and needs of the workplace"

#### **4.3.4 Question 4**

##### ***Q4 - In your opinion, do you think mentorship should be an integral part of workplace learning?***

Most respondents were of the opinion that mentorship should form an integral part of learning. This is because without mentorship employees can get side tracked. They even mentioned that for most of them retail started as a default job as they ended up in retail by chance due to lack of jobs. They indicated that prior to joining the sector, they had no background or love for the industry instead they were forced by circumstances. However, after joining the industry they have since learnt more about the industry and have renewed interest in workplace learning in order to pursue careers in the Wholesale and Retail. This has been made possible by a structured mentorship programme. *"My mentor took a real interest in my work and explained things that just weren't that clear to me from orientation."* Employer focus group participant.

#### 4.3.5 Question 5

**Q5 – What are some of the methods do you think are important in designing and harnessing the value of workplace learning for Wholesale and Retail?**

Participants indicated that the following methods are important in designing and harnessing the value of workplace learning:

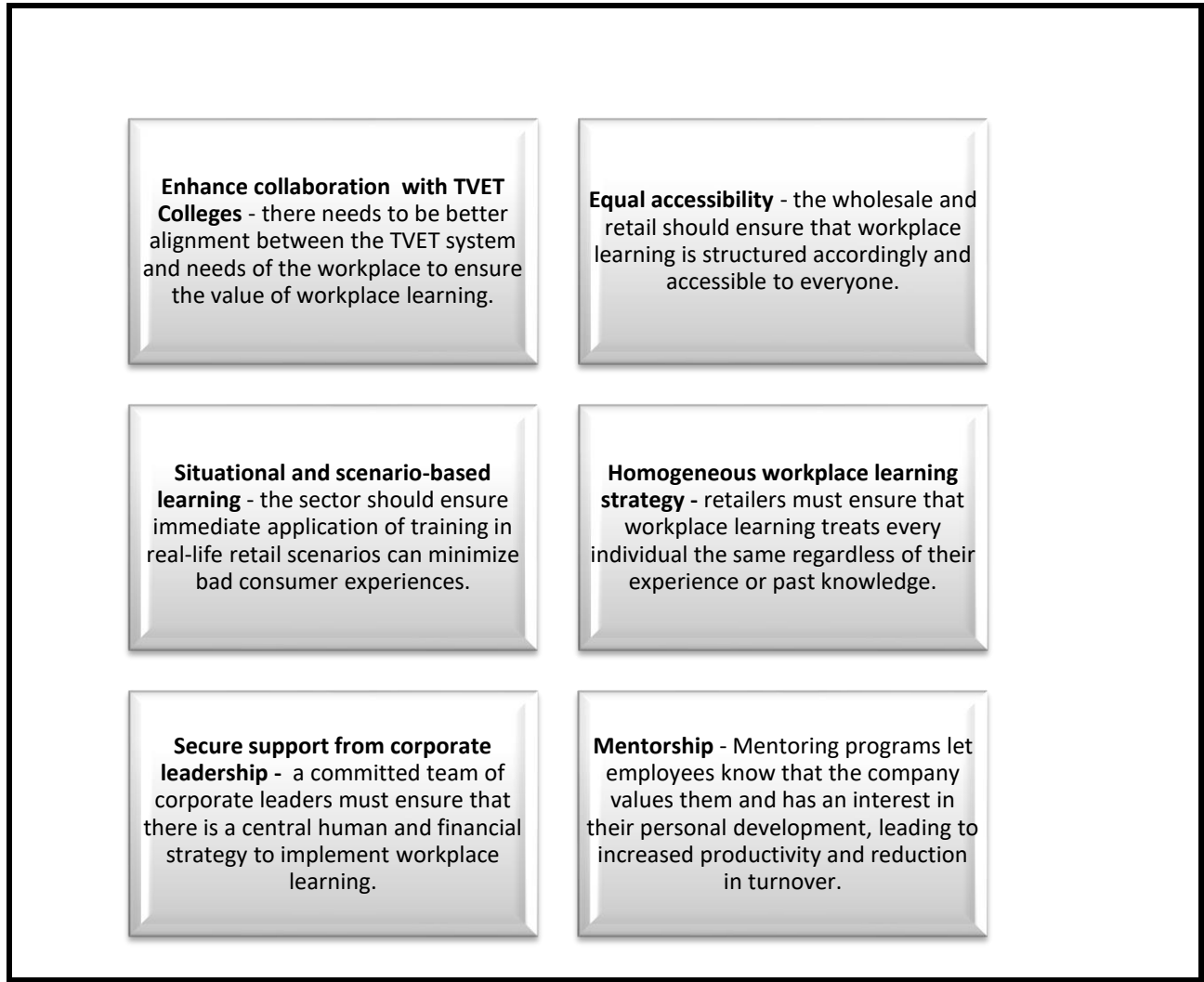


Figure 6: Suggested Methods

#### 4.3.6 Question 6

**Q6 - What do you think should be changed/improved/added to make workplace learning more valued in the sector?**

Participants highlighted the following to change/improve/add to make workplace learning more valuable in the sector:

Changes	Improvement/ Additions
Change workplace learning <b>teaching strategies</b>	<b>Make workplace learning a continuous activity:</b> in order to add value to the performance of employees.
Change workplace learning <b>structure</b> to include needs of both employer and employee alike	<b>Design workplace learning program with clear goals and objectives:</b> to ensure successful implementation.
Make workplace <b>accessible</b> to everyone regardless of their performance	<b>Identify the purpose and objectives of workplace learning:</b> know what knowledge, skills and abilities are required.
Change workplace learning <b>environment</b> to suit employees	<b>View workplace learning as an investment:</b> to achieve competitive advantage
	<b>View workplace learning as a thoughtful intervention:</b> designed at attaining better results
	<b>Measure results and reward performance:</b> to ensure consistency

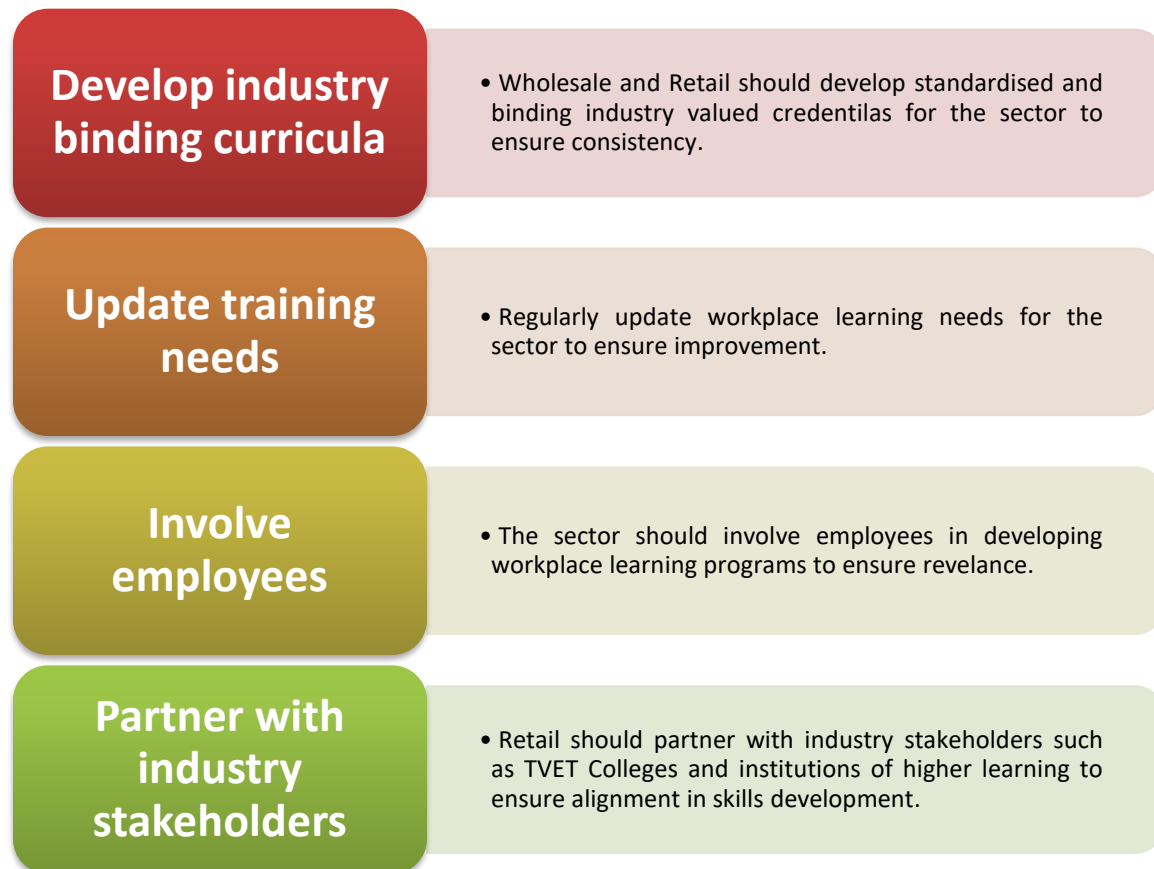
**Table 2: Suggested Changes/Improvements/Additions**

*“Although I was at my company for over 20 years, I advanced because I kept asking what was next. I guess I knew the secret handshake because it really wasn’t clear how I was supposed to get ahead.”– employer focus group participant.*

#### 4.3.7 Question 7

##### **Q7 - What are your recommendations in order to design and harness workplace learning for Wholesale and Retail?**

Participants proposed the following recommendations in in order to design and harness workplace learning for Wholesale and Retail:



**Figure 7: Proposed Recommendations**



#### **4.3.8 Question 8**

*Q8 – Can you share your observations in relation to the value of workplace learning for the sector?*

Most participants felt that workplace learning programs have value for the sector because they make them feel 'somewhat engaged'. However, they indicated that it is alarming to see how that the sector is still failing to embrace new approaches to workplace learning as a part of their overall culture.

#### **4.3.9 Question 9**

*Q9 – What do you think is the future of workplace learning in Wholesale and Retail?*

Participants indicated that to build a cohesive modern workforce, workplace learning has to focus deliberately on catering to the expectations of this generation. This is necessary due to a growing impatient workforce, which has an extremely short attention span with too little time to do anything beyond their everyday job goals.

They further indicated that workplace learning has to break away from the fixed knowledge and traditional learning platforms that bind people down to physical locations and set ups. Therefore, it should incorporate learning agility, effectiveness and innovation into their solutions. Finally, participants argued that workplace learning need to keep viable and sustainable learning that can be adapted and reshaped continuously.

Finally, participants stated that learning is moving towards a more continuous and social process, where informality replaces the more structured interventions of the past. The need for organisations to adapt and change quickly as the world develops at an ever-increasing pace demands different solutions and organisations are likely to encourage their people to take greater responsibility for their own learning. This informality is likely to be supported by technology, with the role of mentorship becoming increasingly more central to the success of learning initiatives.

#### **4.3.10 Question 10**

***Q10 - We would also welcome any additional observations and/or suggestions you may have in relation to the methods of designing and harnessing workplace learning.***

Participants suggested that methods of designing and harnessing workplace learning should strive for the following:

- Improving skills
- Better career opportunities
- Personal growth and development
- Better vision
- Increased knowledge
- Mentoring
- Keep up with trends in the landscape of the retail sector
- Salary (career) advancement
- Enhancing their chances of starting their own businesses

Additionally, participants indicated that workplace learning should allow them to be ahead and secure their future in retail.

## **4.4 Conclusion**

The study was intended to determine methods to design and harness the value of workplace learning for Wholesale and Retail. The research findings highlighted that designing and harnessing successful the value of workplace models for retail requires that corporate leadership mobilized internal and external commitment and resources and are integrated into a culture that embraces advancement with clear career pathways.

Additionally, the research findings emphasized that successful workplace learning experiences in retail should also be bolstered by formalized mentorship for participants and more broadly leverage the strengths of external partners such as TVET Colleges and institutions of higher education. Finally, the findings indicated that workplace learning should be measured so that adjustments can be made and successes can be celebrated.

## SECTION 5: CONCLUDING REMARKS

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The retail industry is a vital force in any economy and provides many people with their first jobs. Salespeople, cashiers, stock clerks, and merchandisers workers make up more than half of the industry's millions of workers. They are also retail's public face—the first and often the only workers who interact with customers walking through a store. A lot rides on these interactions, as people on both sides of the cash register (physical or virtual) know well. However, these workers are unlikely to understand their value to the company and more importantly, their ability to build on their experience and skills to move ahead in retail careers.

Despite their importance to the industry's success, the amount of training for entry-level and frontline retail employees varies but is widely considered to be minimal. Insiders acknowledge the problematic cycle of disinterest and disinvestment. Employers build turnover costs into their business models and therefore limit investment in the largest segment of their workforce. And the cycle continues.

But today, many retail employers are ready to break this cycle and develop a more effective training strategy. To do so, there are three driving realities of today's retail industry that must be recognized. First, a substantial number of retail workers are less than 25 years old and consequently have little or no prior work experience. They view their jobs as temporary positions—a chance to earn some money while in school, or while they try to find that better job or one that will hire them with little or no experience. The frontline and entry-level positions these workers fill have one of the highest turnover rates in the economy, which was most recently thought to be 65 percent.

Second, frontline retail career pathways are different from frontline positions in other industries because of the large number of positions compared to supervisors and the lack of sector-endorsed credentials that identify a career progression. As a result, employers and employees both report that it is harder to see the career potential in the retail industry. Lastly, the future of retail is in flux. Impacted by both the need for brick-and-mortar retailers to place an ever-greater emphasis on customer experience— to differentiate themselves from and compete with online retailers—and the continuing automation innovations in all areas of retail, the numbers and types of employees will change.

Today, education is no longer limited to traditional schooling but is a process that continues throughout one's life course. This process has been aptly titled workplace learning and is a term often used synonymously with lifelong learning (Jenkins, 2006). In Europe, workplace learning is defined as "all purposeful learning activity, undertaken on an ongoing basis with the aim of improving knowledge, skills and competence.

Creating this culture within an organization, however, is not an easy thing. Learning is a catalyst for change in organizations. While individual learning in organizations has long been seen as critical to ensuring its survival, collective learning has more recently become just as important. Because of this, companies are now seeing the importance of implementing workplace learning processes to succeed in today's competitive market.

Workplaces will not be successful if they remain static and studies have found workplace learning to be effective only if it happened in a learning-conducive work environment. Therefore, encouraging employees to learn and providing positive support for learning in the workplace is the most effective way of guaranteeing organisational change. In order to learn at work, employees should have possibilities for "rich" work experiences as well as possibilities for collaboration and autonomy in order to engage in both collective and individual learning.

A successful workplace learning program should include a flexible and accessible learning model; therefore, employees have also cited the need for more time to participate in learning programs. Workplace learning programs are more effective when they are designed to meet the needs of both the organisation and workers.

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## **APPENDIX 1: FOCUS GROUP QUESTIONS**

1. Please indicate your views and experience about workplace learning in your current employment.
2. Do you think workplace learning is valued by your current employer?
3. Based on your familiarity with Wholesale and Retail sector, do you think workplace learning is valued in the industry?
4. In your opinion, do you think mentorship should be an integral part of workplace learning?
5. What are some of the methods do you think are important in designing and harnessing workplace learning for Wholesale and Retail?
6. What do you think should be changed/improved/added to make workplace learning more valued in the sector?
7. What are your recommendations in order to design and harness workplace learning for Wholesale and Retail?
8. Can you share your observations in relation to the value of workplace learning for the sector?
9. What do you think is the future of workplace learning in Wholesale and Retail?
10. We would also welcome any additional observations and/or suggestions you may have in relation to the methods of designing and harnessing workplace learning.