

**A case study of a training programme for educators and trainers within a non-profit
organisation: participant and organisational experiences**

by

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Abstract

This qualitative single case study explored an international Non-Profit Organisation's (NPO) planning, design and implementation of a Training Programme for Educators and Trainers (TPET) during the period 2009 – 2011. Across three cohorts of the TPET only nine of the thirty-two instructors completed it successfully which resulted in the programme being discontinued and stimulated the need for this research.

The objective of this study was to explore the programme implementation process, review the implemented curriculum and explore the candidates' experiences of learning and the barriers they faced in the process.

A historical case study approach was used with an interpretivist paradigm. The case and the unit of analysis was the TPET and the focus was the participant's experiences in the programme. It was framed by the theories of adult learning, curriculum design and instruction and barriers to learning. Using purposive sampling four candidates were selected, including two successful and two unsuccessful candidates. Data was also collected through semi-structured interviews and a document analysis.

The findings from the semi-structured interviews was presented under the following themes: programme implementation and selection of candidates; participants experiences of the programme content; barriers to learning; implementation of learning in the classroom; changes in how participants feel about themselves.

Key findings from the documents reviewed was presented under the headings of the compliance requirements of the Department of Labour, Non-Profit Organisation Instructor Certification Programme, Occupationally Directed Education and Training Development Programme at NQF

level 5, The Training programme for Educators and Trainers with a profile of the interviewed participants.

The study concluded that the initial plan of the NPO to build compliance capacity utilizing the TPET had merit. There however seemed to be a lack of understanding amongst the staff of the NPO regarding the compliance requirements as an accredited training service provider within the South African National Qualifications Framework. There also seemed to be a lack of organisational support for historical disadvantaged individuals participating in the TPET. The study allowed for several recommendations to be made to enable NPOs to improve such curriculum processes.

Keywords: adult learning, programme implementation, curriculum design and instruction, experiences of learning, barriers to learning

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The participants in this study for giving their time and sharing their personal experiences. Their contributions are deeply appreciated.

Declaration

I, Willem van der Westhuizen declare that:

- i) The research in this thesis, except where otherwise indicated is my original work;
- ii) This thesis has not been submitted for any degree or examination at any other university;
- iii) This thesis does not contain other person's data, pictures, graphs or other information, unless specifically acknowledged as being sourced from other persons;
- iv) This thesis does not contain other person's writing, unless specifically acknowledged as being sourced from other researchers. Where written sources have been quoted, then:
 - a) Their words have not been rewritten but the general information attributed to them has been acknowledged;
 - b) Where their exact words have been used, their writing has been placed within quotation marks, and referenced.
- v) The work described in this thesis was carried out in the School of Education, University of KwaZulu Natal from 2016 to 2017 under the supervision of Dr. Vaughn John (Supervisor)
- vi) Ethical clearance protocols reference number: HSS/1752/016M was obtained before the fieldwork started.

Signed: _____  _____ Date: _____ 18 March 2019 _____

As the candidate's supervisor I, Prof. Vaughn John, agree to the submission of this thesis.

Signed: _____  _____ Date: _____ 18 March 2019 _____

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List of abbreviations

ABET	Adult Basic Education and Training
DoL	Department of Labour
ETD	Education, Training and Development
HPCSA	Health Professionals Council of South Africa
HWSETA	Health and Welfare Sector Education and Training Authority
ICP	Instructor Certification Programme
NGO	Non-Governmental Organisation
NPO	Non-Profit Organisation
NQF	National Qualifications framework
OBE	Outcomes Based Education
OFO	Organizing Framework for Occupations
SAQA	South African Qualifications Authority
SETA's	Sector Education and Training Authorities
ODETDP	Occupationally Directed Education and Training Practitioners
TPET	Training Programme for Educators and Trainers
QCTO	Quality Council for Trades and Occupations

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CHAPTER I. Introduction

Introduction

This study explores a Training Programme for Educators and Trainers (TPET) that was implemented by a South African Non-Profit Organisation (NPO) during 2009 and 2011. The training programme, the reasons for its introduction, how it was developed by the NPO and the participants' experience of the programme is the focus of this case study.

In introducing this study, it is important to first introduce some of the post-apartheid educational reform processes and the establishment of an outcome-based national qualifications framework, all of which provide some background to the TPET.

In describing the South(ern) African workplace learning context at the Fifth International Conference on Researching Work and Learning (RWL5) held in 2007, Cooper and Walters (2009) referred to the southern African countries as peripheral capitalist economies. The development of these economies has been directly influenced by colonialism, international development agencies and their specific social, economic and cultural realities. Most of the countries in the region are therefore going through reconstruction and development processes of decolonization and nation building. Cooper and Walters (2009) firmly supported the notion that learning and work should be integrated with pedagogy, politics, the organisation and the educational approaches being followed because of it.

In South Africa, Asmal (2001) the then Minister of Education, described educational reform as a major part of the South African reconstruction and development effort. He argued that educational reform was driven by two priorities that required urgent attention. To address the legacy of colonialism/apartheid and to create an education system that will build a society based on equality and social justice. The second priority was to enable the country to adjust to the economic and social realities of globalization through lifelong learning.

In implementing systemic transformation within the South African educational system, the Department of Education published a summary of their achievements in May 2001. This document summarized the dismantling of the apartheid educational structures, financing of education and a developed policy framework for educational transformation. The legal policy framework included various policies and legislation that included the South African Qualifications Authority Act (1995) and the Skills Development Act (1998).

The South African Qualifications Authority Act (1995) made provision for the establishment of a National Qualifications Framework (NQF) and the South African Qualifications Authority (SAQA). The functions of SAQA was to develop the NQF and institutions such as the Sector Education Training Authorities (SETA's) responsible for the development of standards for qualifications and the quality assurance and verification of achievements against these standards. The South African Qualifications Authority Act (1995) was repealed by the National Qualifications Framework Act (2008) which made provision for the establishment of Quality Councils for General and Further Education and Training (GFET) and Higher Education and Training (HET).

The Skills Development Amendment Act (2008) provided for the establishment of a Quality Council for Trade and Occupations (QCTO's), which according to Lugg (2009) will oversee workplace learning and an Occupational Qualifications Framework. Occupational qualifications are qualifications linked to occupations because of workplace learning and consists of outcome-based unit standards that makes provision for knowledge, practical applications and experience within the workplace. The Act, amongst its various purposes, also clarified the legal position of Productivity South Africa and its functions to improve productivity and competitiveness within the workplace.

The development of learning outcomes and national qualifications frameworks according to Allais (2014) and Lugg (2009) has become an international trend. This trend seems to be driven by government's perception that educational reform can solve their countries social and economic problems. Keevy, Chakroun and Deij (as cited by Allais, 2014) noted that over the past twenty years more than a hundred and twenty countries have been implementing outcomes-based qualifications frameworks. They argue that there is very little scientific evidence to prove that these countries have achieved their set social and economic goals with these frameworks. In this regard Lugg (2009) note that the 2002 report on the implementation of the National Qualifications Framework according to the Departments of Education and Labour indicated that major challenges existed with the implementation of the South African NQF and that there was a growing divide between education and training. According to Lugg (2009) it also seems that the NQF could have contributed to this divide rather than resolving it. It must also be noted according to Lugg (2009), that the implementation of the NQF cannot be divorced from

continuing growing differences in the post-apartheid state such as competing in a global economy, social transformation and dealing with entrenched poverty and inequality in South Africa.

In her evaluation of the South African NQF, Allais (2014) argues that competence and skills are promoted at the expense of knowledge as contained in organized bodies of knowledge. There are therefore similarities regarding the theoretical patterns between knowledge, the workplace, qualifications and the economy as applied within most national educational, economic and political reforms. In this regard Lugg (2009) cited Laclau & Mouffe's discourse theory and noted that the efforts in terms of the post-apartheid South African education system must be seen within the context of a sophisticated power struggle amongst the state, organisations and civil society.

Background and reason for the study

An international health training Non-Governmental Organisation (NGO) currently registered as a NPO in terms of the Non Profit Organisations Act (1997) has been operating in South Africa since 1873. The objectives and purpose of the NPO as contained within its constitution are to market and sustain itself within South Africa. In this regard objectives relates to the support and promotion of activities to help people in disease, suffering under stressful conditions regardless of their race, religion and class. Assistance offered to the diseased, wounded and handicapped during peace, civil unrest or in times of war include training and provision of support to the military and disaster management structure. Training is provided to the general public with a special emphasis on the youth in basic emergency medical care and other health related subjects.

This includes the development, printing and distribution of training material to enable the said training to be delivered and the issuing of certificates of competency. Staff members and volunteers from communities are trained in basic emergency medical care and health related subjects. These trainees provide a service on their own, in groups at public events, in the workplace, care facilities and in private homes. Funding and donations are accepted for health related community development projects with a training focus to support sustainability.

This NPO operates nationally through ten training Centres and is an accredited education and training service provider with the Department of Labour (DoL), Health and Welfare Sector Education Training Authority (HWSETA), The South African Resuscitation Council (SARC) and the Health Professions Council of South Africa (HPCSA). The NPO implemented a Training Programme for Educators and Trainers (TPET) during the period 2009 – 2011. This training programme, how and why it was conceptualized by the NPO and the participants experience of it is the focus of this study.

In terms of its various accreditations as a training service provider, train the trainer criteria need to be met for instructors, facilitators, assessors and moderators. The purpose of the Training Programme for Educators and Trainers (TPET) was to serve as a skills programme for experienced instructors between an in-house Instructor Certification Programme (ICP) and an accredited full qualification in Occupationally Directed Education, Training and Development Practitioners (ODETDP) level 5 qualification.

The in-house ICP was developed to meet the accreditation requirements of the Department of Labour specifically and the development of the NPO's own in-house instructor needs. The ICP is a forty-eight-hour full contact programme presented over five days. The objective of the programme is to develop the participants to become qualified trainers in basic emergency medical care such as first aid. Participants must therefore have a high level of pre-course first aid skills.

The TPET was an external distance education part qualification presented over a one year period with contact sessions. Its purpose was to improve the understanding and competence (skills, knowledge and attitude) of workplace educators and trainers to present and assess skills programmes within their areas of specialization.

The ODETDP level 5 full qualification was introduced by SAQA in 2004. The rationale for this Higher Certificate was to help address the education, training and development priorities in the South African environment which was reinforced with legislation, educational policies and strategies. To be able to meet workplace training and development needs, competent trainers were required at various levels within organisations.

To meet the changing and anticipated accreditation requirements of the HWSETA the NPO nominated three cohorts consisting of thirty-two experienced in-house trained instructors to participate in a UNISA Training Programme for Educators and Trainers during 2009 - 2011. Although the TPET was not SETA accredited it consisted of four unit standards from the accredited ODETDP qualification which was then accepted as the future requirement together

with a technical qualification for presenting SETA accredited training skills programmes and full qualifications. The TPET was to provide practitioners with core competencies to enable access to further development. The programme focused on learning interventions, facilitation methods, learner support and assessment.

The 2009 cohort consisted of ten participants from the NPO's Centres in the Gauteng Province. The nominated participants consisted of six males (five African and one White) and four females (African). Their ages ranged between twenty two and forty one years. Five of the participants (three African females and two African males) completed the TPET successfully. At the time of the study only two of the African females declared competent were still in the service of the NPO.

The 2010 cohort consisted of seven participants also from the NPO's Centres in the Gauteng Province. The nominated participants consisted of six females (African) and one male (African). Their ages ranged from twenty eight to sixty five. Only one of the participants (African female) completed the TPET successfully. At the time of the study only one of the African females not declared competent yet, was still in the service of the NPO

The 2011 cohort consisted of fifteen participants from three of the NPO's Centres. Eight were from the Eastern Cape, two from KwaZulu Natal and five from the Western Cape. The nominated participants consisted of eight females (four African, three coloured and one white) and seven males (five coloured and two white). Three of the female participants (African,

Coloured and White) completed the TPET successfully. They were also from the same Centre. At the time of the study eight of the fifteen participants were still in the service of the NPO.

Across the three 2009 – 2011 cohorts, only nine of the thirty-two instructors completed the TPET successfully. Currently eleven instructors have been retained of which four have completed the programme successfully. As a result of the challenges experienced by the participants and the publication of a new Quality Counsel for Trades and Occupation's (QCTO) qualification for occupational and technical training practitioners at NQF level 4, the TPET development project was stopped in the beginning of 2012.

From informal discussions with participants of the Training Programme for Educators and Trainers several issues and challenges were raised which varied amongst Training Centres. These discussions indicated the need for a study of the experiences and challenges experienced by the participants.

Objectives of study and research questions

This study intended to explore the programme implementation process, review the implemented TPET curriculum and explore candidates' experiences of learning and the barriers they faced in the process.

The research questions for this study are as follows:

- Why was the Training Programme for Educators and Trainers implemented in this Non-Profit Organisation?

- What was the programme implementation process?
- How did participants respond to the programme and what were their learning experiences?

Design and methodology overview

This study used a historical case study approach as described by Rule and John (2011). This approach enabled the researcher to reflect on and to explore the implementation process of the Training Programme for Educators and Trainers (i.e. organizational rationales and experiences regarding the TPET) and the learning experiences of the unsuccessful and successful participants. The research was conducted using an interpretivist paradigm through the lens of adult learning, curriculum design and instruction, and barriers to learning as theorized by Cross (1981), Kelly (2009), Knowles, Holton and Swanson (2015) and Ornstein & Hunkins (2014). The study employed an inductive design, which was framed by the theories of adult learning, curriculum design and instruction, and barriers to learning, to enable a better understanding of the case within an existing body of knowledge.

The case and the unit of analysis will be the Training Programme for Educators and Trainers and the focus will be the participant's experiences in the programme.

It is intended that this research project will contribute to learning at work and discussions regarding the challenges in implementing an outcomes-based NQF vocational training and development programme based on a SAQA approved curriculum, the compliance tensions that it creates within the organisation in meeting external quality assurance criteria while

simultaneously meeting organisational, funder and participants' training needs. A second aspect of this project is exploring the ability of the participants in overcoming barriers to learning within this context.

Structure of thesis

Chapter 1: Introduction.

This chapter introduces the context of the establishment of an outcomes-based national qualifications framework in South Africa and the priorities, background and reasons for this study. The objectives of the study and the research questions are introduced. A short overview of the research design and methodology is included. The remainder of the chapters, and their arrangement is introduced.

Chapter 2: Literature review.

The literature review includes the context and the policy landscape in South Africa in where this research project took place during 2009 – 2011. A short summary is also given on related studies. The literature relevant to the research questions, such as, workplace learning, adult learning models from psychology, learning models from adult education, transfer of learning and planning programmes for adult learners, curriculum design and development, barriers to learning and the conceptual framework for the study are reviewed.

Chapter 3: Design and methodology.

In this chapter the research design and methodology used in this research project is explained as well as the sources, the process of data collection and its analysis. The position of the researcher

is declared, the limitations of the study, quality, trustworthiness, validity, reliability and ethics of the study are also discussed.

Chapter 4: Findings and theorization.

This chapter provides an overview of the data collected from a purposive sampling process from selected documents and semi-structured interviews of four participants of the TPET. The chapter includes a profile summary of the participants and a thematic analysis. The themes address programme implementation and selection of participants, participants experiences of the programme content, implementation of learning in the classroom and changes in how participants feel about themselves. Each of the themes contain findings, supportive quotations of the interviews and theorization thereof.

Chapter 5: Conclusions, limitations and recommendations.

This chapter presents a summary of the research project. It gives an overview of the research problem, the research questions and its context, the reason for the study, a discussion of the findings, limitations to the study, recommendations for future research and conclusions based on the results of the study.

Conclusion

This first chapter introduced some of the post-apartheid educational reform processes and the purpose of the establishment of an outcome-based national qualifications framework. It was also argued whether these frameworks were successful in achieving the required education reforms intended. It outlined the background and reason for this study within the South African

Qualifications Authority and National Qualifications Framework context. The objectives of the study were discussed, and the key research questions were introduced.

A brief overview was given of the design and the methodology used for this historical case study and the various chapters and content thereof

The next chapter provides a review of the relevant literature related to the topic of the study, the key concepts contained within it, and the key research questions of the study.

CHAPTER II. Literature review

Introduction

This chapter provides an overview of the literature review conducted in relation to the main concepts of the study, “A case study of a training programme for educators and trainers within a non-profit organisation: participant and organisational experiences” and the supportive research questions. The case and the unit of analysis is the training programme for educators and trainers and the focus of the study is the participants’ experiences in the programme.

According to Rule and John (2011) the case in a research study is always within a specific context with environmental factors that influences the case and its interaction with these factors. Being a historical case study, the context in this study will be from a sociohistorical background to enable to locate the study in relation to when it took place. The headings for this literature review will therefore consist of the context and policy landscape, related studies, workplace learning, adult learning models from psychology, learning models from adult education, planning programmes for adult’s learners, curriculum design and development and barriers to learning.

To put the study in context in terms of how the NPO possibly conceptualized the implementation of the TPET, the role of non-governmental organisation’s in adult education in the developing countries, as described by Aitchison (2003), was used. In terms of the changing policy landscape and with the development of outcomes-based national qualifications frameworks there is a need for the standardization of terminology in adult education as emphasized by Allais (2014), Aitchison and Alidou (2009) and Tuchten (2011) and. This review was supported by a

chronological summary of some of the compliance changes that the NPO had to deal with in relation to its organisational purpose as described by Robbins and Barnwell (2006) and the impact it has on career management within the NPO as described by Baruch (2004) and Greenhaus, Callanan and Godshalk (1994).

A library search was conducted on three related qualitative studies by Du Preez (2008), Grant (2015) and Segoe (2012). These studies provided a good reference guide in terms of the key aspects identified within this study such as literature reviews, context insights and the data analysis process.

As this study took place within a workplace environment, this aspect was reviewed in terms of training and development of workers. The workplace has become the biggest delivery system according to Marsick (1988) and is also growing as a separate field of study according to Boud, Garrick and Greenfield (2001). According to Merriam (2008) adult learning is the basis of all education activities irrespective of where it takes place. The rising trends and perspectives within the workplace as highlighted by Fenwick (2008) is considered as well as the current concerns in adult learning described by Hill (2008) and adult learning theory and its multidimensional aspects as highlighted by Merriam (2008).

The field of psychology according to Tusting and Barton (2003) produced most of the learning theories. According to Tusting and Barton (2003) there are different types and models of learning that applies to different situations. They grouped the various theories under different models, namely behaviorism, cognitivism, cognitive constructivism, development theories,

activity theory and social constructivism, situated cognition and brain science. A summary of these models is presented in a table format with references to Bates (2016), Illeris (2009), Jarvis (2010) and Merriam and Bierema (2014).

In reviewing learning models from adult education, the characteristics of adult learners from Knowles et al. (2015) is included as well as a critique of andragogy by Baumgartner, Lee, Birden and Flowers (2003), Lee (2003) and Tusting and Barton (2003), self-directed learning by Merriam and Bierema (2014) and Baumgartner et al. (2003), learning to learn and informal learning by Tusting and Barton (2003). Reflective, experimental models and transformative learning is acknowledged but has been excluded from this review.

The literature review for transfer of learning and programme planning includes the work done by Merriam and Leahy (2005) on the transfer of learning from different disciplines. In citing Baldwin and Ford (as cited by Merriam & Leahy, 2005) on the three variables that influence transfer of learning, Merriam and Leahy (2005) make recommendations aligned with adult learning theories related to the three variables consisting of the characteristics of the learners, programme planning and the work environment. The systematic framework developed by Sum (2007) which includes the interactive model for programme planning as developed by Caffarella and Daffron (2013) was included.

For curriculum design and development, the planning of educational programmes by Kelly (2009) and Ornstein and Hunkins (2014) has been reviewed. With the current debate on the decolonization of education and the impact on curriculum development, articles of Le Grange

(2016), on decolonizing the university curriculum and Jansen (2017), on decolonizing the university curriculum, given a dysfunctional school system, has been added to this review. The barriers to learning are reviewed to enable classification of learning experienced by the participants in the TPET. This review included the classifications identified by Cross (1981) and Fagan (1991). The bounded agency model of Rubenson and Desjardins (2009) is included as well as a South African perspective as developed by Landsberg, Kruger and Swart (2016).

To explore the implementation process of the TPET within the NPO and the impact it had on the participants learning needs the conceptual framework consisted of: the interactive model as developed by Caffarella and Daffron (2013), adult learning principles as developed by Knowles et al. (2015), the key questions developed by Ornstein and Hunkins (2014) and the barriers to learning as identified by Cross (1981).

Context and policy landscape

International and national Non-Governmental Organisations have a long history of contributing to adult education in developing countries. Within the South African context, Aitchison (2003) provides an overview of the pre and post 1994 policy, planning and implementation processes and challenges. According to him, the outcomes-based approach for training and the emphasis on quality assurance and assessment has considerably affected the capacity to deliver accredited adult education programmes.

With the development of new training and development terminology Aitchison and Alidou (2009) highlighted the need for standardization of the terminology used specifically within the

field of adult education. According to them, this should facilitate policy implementation, legislation and standardization, and whether formal and vocational education and training be grouped as being part of adult education. There are, however, various opportunities for upskilling adults to obtain accredited work-related qualifications through part time and distance education.

Tuchten (2011) prefers the use of the acronym AET for adult education and training, as the use of adult education, according to her, could cause misunderstandings. The term ABET is also seen as problematic as it limits the progression of adult learning. Tuchten (2011) summarizes three major approaches used within adult literacy that still surface in traditional South African AET debates. The three approaches consists of the Laubach approach, seen as part of religious transformation and used mainly by church groups; the Freirean approach, focusing on relationships within a society and influencing history and used mainly by political groupings; the Functional approach, to improve the lives of the marginalised to enable their survival and mainly used by Non-Governmental Organisations. The Functional approach is specifically important in primary health care and emergency medical care training within the health and welfare NPO sector such as the NPO where this research project was conducted. According to Tuchten (2011), the Functional approach formed the basis of the apartheid state's interest in AET and it was also supported by UNESCO research. This aspect is important within the research project as it may influence the development of the instructor's capacity to work with functionally illiterate course participants in emergency medical care short courses, such as first aid.

As identified by Aitchison (2003) several policy and mandatory changes have taken place within South Africa since 1995 that influenced skills development within organisations and their

education and training interventions. The areas relevant to this study, includes but are not limited to, the following:

- Mandatory accreditation requirements as a training service provider and the changing criteria for instructors of Sector Education and Training Authorities (SETA's) accredited training programmes.
- Staff development interventions for instructors to meet changing compliance and accreditation requirements.

Below follows a brief chronological summary of some of the education and training environmental changes that have influenced the context giving rise to this research project.

During 1992 a National First Aid and Emergency Care Standards Committee was established by the then Surgeon General. The purpose of this committee was to reach uniformity and specify minimum training standards for the industry in South Africa. This included the minimum technical qualifications for instructors and the minimum compulsory content for a course in instructional techniques. Topics to be covered included principles and theories of learning, the role of the instructor, planning and preparation, instructional methods, evaluation and administration.

In 1993 the Occupational Health and Safety Act (1993) was promulgated which included compliance requirements based on the above National First Aid and Emergency Care Standards. Since 1994, extensive legislation was promulgated to address the effects of the apartheid education system. This resulted in the establishment of the South African National Qualifications

Framework (NQF) and the Sector Education and Training Authorities (SETA's). The SETA's developed new outcomes-based qualifications as well as prescribed assessment and moderation requirements to ensure SETA endorsement of training delivered by accredited training service providers using registered instructors/assessors/moderators.

Outcomes based education (OBE) has attracted substantial dissatisfaction and responses from educationalists as a form of educational policy. Jansen (1997) argued that OBE was a political reaction to the previous education system rather than improving what was happening within the classrooms. He predicted that OBE would fail and motivated this prediction by identifying ten specific challenges. Many of these predictions turned into reality and OBE was eventually abandoned as an educational policy.

Allais (2003) proposes that the main reason for the introduction of the NQF was to establish a democratic, classless and equal education system. It, however, has turned out to be more of an alignment to a neo-liberal economy than a democratic educational project. She argues that the skills approach neglects education, which relates to assimilating knowledge. According to her, this is problematic, as the system has separated the development of training standards from training providers and training programme development.

Relevant to this study is the specific qualifications developed by the Education Training and Development Practitioners Sector Education Authority (ETDPSETA) for Occupational Directed Education and Training Development Practitioners (ODETDP) at National Qualifications Framework (NQF) level 5. As mentioned previously, this qualification forms the basis of the

Training Programme for Educators and Trainers (TPET), and is the case under study, that the instructors of the Non-Profit Organisation (NPO) attended.

The Department of Labour developed the Organizing Framework for Occupations (OFO) codes to coordinate skills training in South Africa. These codes were implemented during 2005 and forms part of the SETA's annual Workplace Skills Plan (WSP) and Annual Training Report (ATR). The instructors employed by the NPO, who are participants of this study, are listed under OFO code 242402.

During 2010 the new Quality Council for Trades and Occupations (QCTO's) was established resulting in a new National Qualification for Occupational Trainers (OFO code 242402) which was published in the Government Gazette number 35957, dated 14 December 2012, for input and comment. The development of this qualification is a national priority of the Department of Labour. It is the intention of the QCTO's to use the OFO codes which is a coded occupational classification system to develop specific skills for the listed occupations such as the Occupational Trainer and once approved will meet current and future needs of commerce and industry.

The continuous changes in the education and training landscape, as presented above, creates substantial challenges within organisations. This relates to obtaining or allocating funding for the development of organisational capacity while simultaneously maintaining operational requirements as current staff is upskilled or retrenched, new staff is recruited, learning

managements systems are upgraded for compliance purposes, financial sustainability as a result of increased overhead costs and continuous changes in compliance requirements.

The Non-Profit Organisation where this study was conducted exists for a specific purpose, as defined within its approved constitution. Robbins and Barnwell (2006) defines an organisation as a deliberately managed and controlled unit that has specific borders and operates to reach agreed objectives. In this definition, the term organisation also relates to the organization's structure, its design, applied organisational theories and its behavior in achieving its objectives. Organisations are also systems and within an open system approach, there is continuous interaction with its environment. Environmental changes as a result of changing education policy and accreditation requirements for training service providers, can therefore result in organisational re-structuring. This organisational response is required to meet changing compliance requirements and to enable financial sustainability in the organisation. The first research question of this study explores such dynamics.

According to Baruch (2004) changes in the environment that influence an organisation to change also causes re-alignment in the career systems of the relevant organisation. Career management must therefore adjust to changing career paths to ensure external compliance requirements. The focus has therefore shifted from the traditional psychological contract to the employability of the employee. Skills development therefore must enable the employee in such a manner that should future restructuring occur, re-employment elsewhere can be possible because of the accredited skills development process.

Greenhaus, Callanan and Goschalk (1994) emphasize the need to link career management and an organisation's human resources system to address employees and organisational development needs. Organisations determine the processes required to ensure that it has the required skilled employees to achieve its business objectives and compliance requirements to ensure financial sustainability. It is however required that each employee participate in the needs assessment process to prevent organisations from making unjustified conclusions about the development needs of an employee. Once this process is completed, a decision is made as to whether the skills needs can be addressed internally through on the job training and/or re-deployment. External options consist of training and development programmes or through the external recruitment and placement of suitably skilled people. These aspects were considered by the NPO where this study was conducted. As a result of limited internal train the trainer capacity, timeframes for development of instructors, cost and production challenges and the number of instructors to be trained, a decision was made to use an external tertiary institution. This was done as an interim arrangement for the upskilling of the selected instructors. These challenges contributed substantially to the rationale for implementing the TPET within the NPO, which is the focus of this study.

Related studies

In an online library search, the following three related theses were found that also investigated aspects of barriers to learning within a school, a university and the learner support required in the provision of a tertiary distance education programme.

Du Preez (2008) conducted an interpretivist case study exploring the motivation for learning and the barriers to take up formal learning opportunities of African women in a Durban school. There is an overlap of two of the three key research questions regarding the barriers working African women face. These barriers are related to accessing formal education opportunities and the role previous schooling, or other sources, could contribute to it.

The context of the present study differs as the formal learning opportunities offered to employed instructors is part of the career development process and is therefore a work related requirement. It also enables the accreditation of the employer as a training service provider within the South African Qualification Framework system. Should the employed instructors not meet future registration requirements, they could jeopardize their own employment and the accreditation status of their employer.

The Grant (2015) study is a qualitative study that investigated the institutional barriers to learning experienced by full time students at a university in KwaZulu Natal. Two of the three key research questions overlap with the present study in terms of the perceived institutional barriers experienced by students and how these identified barriers affect their academic results.

Segoe (2012) conducted an in depth qualitative study on learner support in the provision of a distance teaching programme for under qualified teachers. The study was done from a learner's perspective to enable a better understanding of the participants' experiences and feelings. The theoretical framework for this study is based on a constructivism learning theory and the principles of learning that it proposes. Within the context of previous studies done on distance

education the researcher identified five critical learner support activities consisting of support offered at registration, study support services, contact sessions as learner support measures, technological support and feedback measures as a form of learner support. These support activities are then adjusted and implemented to accommodate the changing education system and the upskilling of educators.

These three studies provided excellent reference guides for my own study in terms of initial literature reviews and context insights. It also assisted with the eventual data analysis process in terms of similarities and differences in those areas where the studies overlapped.

In terms of the insights gained from these studies the aspects of learning in the workplace, learning theories, programme planning for adults, principles of adult learning, the curriculum and barriers to learning, needs to be explored further to obtain an understanding of the theoretical frame work to analyse the collected data and to answer the research questions.

Workplace learning

The American Society for Training and Development, as quoted by Marsick (1988), notes that the training and development of workers in the workplace has become the biggest delivery system for adult education worldwide. Marsick (1988) commented that workplace training and development is busy working towards developing an identity of its own as a field of study. Boud et al. (2001) refers to learning at work as one of the most exciting developments within management and education. Because of fast changing work environments and organisational demands to remain competitive, Boud et al. (2001) argues that knowledge within this context has

become a primary resource which has resulted in an increased demand for learning. According to Tusting and Barton (2003) these changing work practices within the new knowledge economy requires new models of understanding that can only be achieved through learning.

In terms of knowledge as a primary resource, Wenger, McDermott and Snyder (2002) notes that knowledge within organisations has become the main medium for financial sustainability.

Organisations, however, need to know what knowledge will give them the required competitive advantage. They also refer to the challenge of the half-life of knowledge which is continuously being reduced and the organisational challenges of keeping up with increased knowledge available through communications technology and the internet. Within this context they propose the establishment and nurturing of communities of practice within identified strategic areas to facilitate competitiveness and the development and retainment of talent.

According to Merriam (2008) adult learning is the foundation of all formal and informal adult education activities irrespective of where it is taking place. In terms of learning, the context in which it takes place influences learning directly. Adult learning has shifted from the adult's intellectual ability to assimilate learning to a more multidimensional overall occurrence involving the individual in terms of his/her physical, emotional and spiritual condition. A major rethinking is taking place about learning within the workplace which in the past and still is referred to in many workplaces as training and development. There is also the development of a new social movement, the Convergence Movement, that is questioning accepted universal truths in terms of learning, which forms part of post modernism. This movement, although critical of, also provides solutions for consideration regarding the oppressed and marginalized.

Rising trends and perspectives

In terms of emerging trends and new view points in the workplace, Fenwick (2008) highlighted two main groupings of issues. The first is to determine how workers solve challenges at work, such as, the introduction of new technologies, changed work flow, working in multidisciplinary groups, self-awareness and prejudice through learning. The second is to develop an understanding of group learning of specifically marginalized workers such as older workers, those with disabilities, immigrant workers and those belonging to groups that have been racialized. How do they get entry into significant, decent work and comparative remuneration?

The above two groupings, according to Fenwick (2008), has resulted in ideas about workplace learning to change performance-based systems views, self-concept and literacy theories and ideas about the application of politics and power in the workplace. The rapid changes in the work environment and new technologies because of globalization, has created a new interest in workplace learning. It has also created interest outside of the education and training debates.

In terms of addressing the emerging trends and viewpoints about learning processes in the workplace, Fenwick (2008) identified four important workplace themes from an adult education perspective. There are new developing definitions and views; developing focus on performance based systems learning; developing significance of self-esteem and literacies; developing views on power and politics.

With the changing view of learning in the workplace, the definition for learning has changed and the term can now refer to many different related concepts such as change, transformation, enablement and the development of new competencies (skills, knowledge and attitudes) for individuals and workgroups. With the changing nature of work and technology, a workplace can be any place ranging from a fixed space, to workers on the move. The concept of work itself has become complex as it can be formal, informal, paid, unpaid or voluntary. Within this context, Fenwick (2008) defines workplace learning as enabling people's opportunities for adjustable and innovative responses within the context of their specific work activities.

Before the mid-eighties learning was generally described as to obtain new competencies from a variety of sources and transferred to the learner. The learned worker was perceived as increasing the organisation's human resources capacity which was viewed as a return on training and development investment. According to Fenwick (2008) this view started to change with the introduction of reflection, self-directed learning transformative learning and the recognition of learning styles within the workplace learning process.

The above contributed to the development of the learning organisation in the nineties and other learning perspectives. This included the "communities of practice" model as proposed by Wenger (1998). Learning in the workplace is perceived as a process of continuous improvement of work processes and linked to a body of knowledge within a defined community. The individual partakes within a community of practice and is exposed to the preconditions (rules, norms, values, ethics, history, purpose, tradition) of acceptance and membership within the community.

Another perspective is the cultural historical activity theory (CHAT). Workplace learning is influenced by the systems allocation of labour, its community associations, policies, ethics, culture and history. Learning is therefore seen as increasing the systems objective and changing its practices mostly through identifying flaws within the system and resolving it. The third perspective is the complexity theory. According to Davis and Sumara (as cited by Fenwick, 2008) the core concepts rising within this perspective are knowledge, incidences, events, and participants that are jointly reliant, jointly essential and able to rise together. The worker's activities, and their understanding of it, is part of the work environment, they are interlinked within their work system which is part of a bigger system in which they operate. Workplace learning within this context is an ongoing process that capacitates individuals, groups and organisation's within a complex system to perform within an ever-changing operating environment.

Current concerns in adult learning

The agenda for the future, tabled at the Fifth International Conference on Adult Education, according to Hill (2008) addressed some troubling issues facing mankind. It included the importance of adult education in helping individuals of all age groups to deal with tasks through knowledge, bravery and inventiveness. The Hamburg Declaration on Adult Learning of 1997 (as cited by Hill, 2008) emphasized that adult learning can influence the development of how individuals see themselves and can therefore also help them to make their lives meaningful. According to Hill (2008), our current reality has been influenced by seventeen and eighteen century enlightenment and humanism. These influences have resulted in the belief that

individuals are rational and independent and the way they see the world is based on knowledge, calculation and reasoning. Learning therefore take place through empirical investigation that is objective, based on evidence and is perceived as the truth. According to Hill (2008) this is referred to as “foundational knowledge” and described as modernism. When applied to learning within the context of social fairness, foundationalism therefore influences how justice and solutions are determined for perceived social challenges. In investigating the leading pedagogy in adult education, Hill (2008) identifies the domineering hold of foundational thinking in adult education.

Within the context of social justice, social movements according to Hill (2008) and Walters (2009) play an important role in developing new models of learning. This is achieved within societies through the introduction of new norms and values, the development of new knowledge to make sense of new phenomenon’s and developing confrontation. Within this context, a new social movement is developing according to Hill (2008) which is called the Convergence Movement. It is driven by union involvement, public defiance and specific behaviors. It is a movement that has given rise to a new form of militancy according to Klein (as cited by Hill, 2008). Globalisation contributes to the formation of this movement and it is concerned with various issues of social justice related to increasing income differences in populations, the rise of new individual identities, the sidelining and hiddenness of marginalized groups and the development of new information and communication technologies. It is therefore about individuals and groups self-respect and their resistance to be excluded from social reckoning. This movement also demonstrated the unpredictability of social opposition to capitalism, military aggression and neo-liberal market policies. It is establishing an ethos of being present through

being different with the objective of having the rights of people that are different to be accepted on their own terms.

In establishing itself at ground level the Convergence Movement makes use of protest action, unlawfully occupying spaces, vigil watches and organized defiance activities that can be interpreted as activities that directly confronts postmodernism mainstream thinking. According to Sandlin (as cited by Hill, 2008) these activities can be referred to as cultural jamming, which is a method of analytical adult education practice that opposes the domination of current similar prevalent cultures within society.

Adult learning theory in the workplace

Merriam (2008) highlighted that facilitating learning is the basis of all adult education processes irrespective of where it is taking place. Therefore, being knowledgeable about how adults learn enables a better understanding and facilitation of learning for adults and helps in theorizing their learning. Adult learning theory development is a continuous and complex activity. There is currently an emphasis on the context in which adult learning takes place, such as the workplace, and that it is not only a cognitive process, but it is multidimensional in nature. In this regard, Illeris (2009) identified three dimensions in his learning theory consisting of content which explains knowledge and skills, incentive that drives the learner and interaction that stimulates the learning process and is reliant on the content and incentive dimensions. In this regard Merriam (2008) notes that the concepts of andragogy and self-directed learning has become two major pillars within the facilitation of adult learning, which will be reviewed separately and in more detail.

In terms of the learning context, Merriam (2008) notes that adult learning theory has focused on the adult learner's ability to make sense of information and how it enables understanding and contributes to their independence. In this regard she argues that andragogy and self-directed learning are about the individual. This approach is also similar to Mezirow's (as cited by Merriam, 2008) idea of transformative learning.

Currently the history and socio- cultural context of the adult has become a very important aspect in adult learning. Fenwick (2008, p19) refers to this aspect in terms of defining workplace learning as "not just human change but interconnectedness of humans and their actions with rules, tools and text, cultural and material environments". Because of this awareness more researchers are considering how the learners spatial environments support or inhibits their learning process. In grasping adult learning there has been a shift from the individual adult learner to the context of how the learner is placed within their workplace and community. This aspect has resulted in a better understanding of learning in adults. It seems that this aspect has had a major influence on the participants in the TPET from marginalized communities within this research project.

In terms of adult learning as a multidimensional activity Merriam (2008) noted that for most of the twentieth century adult learning was perceived as a process where the brain absorbed data and changed it into knowledge which then resulted in observable changes in social conduct or work performance. In terms of current thinking, learning as a phenomenon is constructed more holistically as also illustrated by Illeris (2009) and Jarvis (2010). This now involves the brain to

make links which ties learning to previous physical experiences to enable the development of meaning. Spirituality is acknowledged within learning as well as the concept of narrative learning in making meaning. Within non-western systems, storytelling, physical and spiritual experiences are common parts of making meaning and therefore learning.

Adult learning models from Psychology

In their review of models for adult learning, Tusting and Barton (2003) refers to adult learning or andragogy as a response to the learning of children or pedagogy. According to them there are therefore different types and models of learning for different situations. In this regard according to Tusting and Barton (2003), the field that has produced most of the learning theories are psychology within two specific learning groupings.

The initial learning models such as behaviorism, cognitivism and cognitive constructivism explain learning for a person in relation to behavior or performance changes and altered mind maps. The second and later learning models created a new paradigm within socio-cultural psychology, social constructivism, activity theory and situated cognition where learning is explained as a socially situated occurrence and as a byproduct of peoples' involvement in social activities. In this regard Illeris (2009) noted that all learning consists of the two different processes, consisting of the learners interaction with his external environment and the internal processes of internalization. According to him most of the learning theories only addresses one of these aspects. It, however, seems that both these aspects need to be present for learning to occur successfully.

Merriam and Bierema (2014) explain that learning theories help to develop an understanding of how learning takes place. They however argue that there is no agreement on the different learning models, how they are grouped and presented. They however refer to behaviorism, humanism, cognitivism, social cognitivism and constructivism as the foundational learning theories in adult education.

For this research project a summary of the adult learning models from psychology were compiled in Table 1 based on the research review of adult learning models as completed by Tusting and Barton (2003).

Table 1

Learning models from psychology

Model	Theorist
<p>Behaviorism Behaviorist learning theories suggest that learner's behaviors can be modified by analyzing sophisticated behaviors and then reward the learner for the required responses. This model does not contribute to understanding the individual's development of independence</p>	<p>Skinner: Operant conditioning and variations of model used for behavior modification</p>
<p>Cognitivism The model of cognitive learning developed a better model of the cognitive processes that assist learning in individuals. The benefit of this model is the value of using the learner's current knowledge and to develop our understanding of their learning rather than emphasizing the correct behavior</p>	<p>Millard & Dollard: Re-enforcement through reward of learner or peers (stimulus and reward)</p> <p>Bandura: Social learning theory and observational learning/imitation</p> <p>Gagne: Learning is about the processing of information. Learning is progressive and build on previous skills and knowledge</p> <p>Ausubel: Theory of instruction, new information need to fit in with existing mind maps</p>

<p>Cognitive constructivism This model of cognitive constructivist learning theory recommends the value of allowing learners to choose their learning based on their own understanding and what interests them. This process will be specific to each learner and they need freedom to do so.</p>	<p>Piaget: Developmental learning model – active interaction in experience and building on existing mind maps</p> <p>Bruner: Spiral curriculum, learner helped to understand subject structure to fit into their way of thinking</p>
<p>Developmental theories The result of developmental models is that an adult’s development is not a straight-lined process with definitive objectives to be achieved. Most of the development theories are influenced by social and cultural aspects. It is therefore required to know and understand the social responsibilities and activities that adult learners are involved in and to adjust the development theories used accordingly. This approach of learning facilitation should be more meaningful and motivate learners to continue their further development.</p>	<p>Piaget: Four stages of cognitive development of child development and its application on all learners</p> <p>Merriam & Caffarella: Stages of cognitive development within adult education</p> <p>Perry: Processes of development from absolutism, relativism and reasoning</p> <p>King & Kitchener: Stages of developing judgement based on reflection</p> <p>According to Tusting & Barton most of these studies were done on small groups of students and can therefore not be generalized</p>
<p>Activity theory and social constructivism Activity theory and social construction requires that learners require contact with peers at a similar level to enable further development and facilitation processes and suitable relics is important in the learning activities.</p>	<p>Vygotsky: Combining theories of development and constructivism. Human minds develop its goals and interaction with people in social and cultural contexts. Zone of Proximal Development illustrate difference between present and potential levels</p> <p>Cole, Engestrom & Scriber: Activity theory, people’s involvement in everyday cultural activities which put context before individual’s cognition</p>
<p>Situated cognition Situated models of learning propose that facilitators should understand the social activities that their learners want to get involved in. It is therefore recommended to create chances to get practical exposure to these activities to facilitate learning. Learners are already involved within complex social activities in their normal lives that classroom activities do not necessarily uncover. A departure point would be to give recognition to learners that they can participate in day to day activities and use it as a foundation of education and training and learning.</p>	<p>Lave & Wenger: Situated learning in different contexts: learning by doing, in communities of practice through levels of outlying participation to develop expertise. When people get involved in social activities learning will take place which is more valuable than decontextualized skills development</p> <p>Tenant & Pogson: Distinction between theoretical thinking and practical situated practice</p> <p>Evans: skills transfer from one environment to another resulting in using the context of the learning</p>

	environment and adjusting it to apply to a different context
<p>Brain science</p> <p>Initial theories attempted to map the brain in terms of thinking and proposed that the right brain was responsible for creativity and the left brain for analytical thinking.</p> <p>Development in neuroscience indicated that the brain continually develops because of the interface between the environment and the brain.</p>	<p>Cohen & Leicester: Better insight how the brain functions, deal with incoming information and reconstruct itself because of positron emission tomography (PET) and magnetic resonance imaging (MRI) scans.</p> <p>Gee: Intrinsically social model of learning interaction between the brain and the outside world occurs within a socially and historical context</p>

Source: Tusting and Barton (2003)

Behaviorism according to Merriam and Bierema (2014) is very prominent in vocational education and training. It focusses on determining specific skills required for an occupation and presenting it from basic to advance levels. Learners are then required to demonstrate their competence in these new skills against criteria to improve performance which include changes in behavior to support new levels of performance. In terms of Mackeracher (as cited by Merriam & Bierema, 2014) behaviorism pervades through the development of instructional guides, programmed learning material, programmes that focus on behavior change and learner feedback in support of it.

Merriam and Bierema (2014) cautions against the mechanistic compliance with behaviorism in the design of curriculum and instruction as it does not accommodate the intricacy of learners and the learning process itself. In this regard it is contrary to humanism that departs from the behaviorist perspective. People have the ability to improve themselves through learning and to

make choices in terms of their behavior. This aspect is illustrated in learning models of andragogy, self-directed learning and transformational learning which is based on humanism.

Learning models from adult education

In considering the learning models from adult education, Tusting and Barton (2003) first reviewed the models that describe the specific characteristics of adult learners and the humanistic theories that support it. They then reviewed some of the significant concepts that have become prominent in adult learning consisting of self-directed learning, learning how to learn, informal learning, reflective/experiential learning and transformative learning.

Characteristics of adult learners

Knowles et al. (2015) emphasized that education for adults must be aligned to their training needs. This is done through designing and developing learning programs by applying a set of core adult learning principles consisting of the adults' knowledge needs, their self-esteem, their previous learning experiences, their motivation to participate, their development as self-directed learners, their situation towards and their understanding of why they need to participate in learning activities. These principles function best when adapted to individual learners and their situational settings.

In comparing pedagogy and andragogy, Knowles et al. (2015) argues that both models are based on assumptions about the learners that can be used in situations depending on their dependency or self-directedness. Realistic assumptions about learners dependency or self-directedness will

therefore determine which pedagogical or andragogical strategies are to be used regardless of their age.

Table 2

Knowles pedagogy and andragogy assumptions

Learner characteristics	Pedagogy	Andragogy
Learner - changes in self-concept	The learner is dependent, and the facilitator takes care of the what, when and how of the learning process	It is anticipated that the learner will move from dependency to self-directedness. This takes place at a different pace amongst learners. Facilitators therefore need to create an environment to assist in this process as the learner could only be initially dependent
Experience - accumulation thereof	The focus is on the experience of the facilitator or as contained in the learning material and media. Facilitation consists of lecturing, textbook and multimedia presentations	As learners learn and grow, they become a resource for themselves and for other learners. The instructional methodology needs to be adjusted to acknowledge and tap their experience through discussions groups, problem solving, simulation and fieldwork
Willingness to learn - readiness	People are ready to learn when they are told by society to do so. Learning should therefore be presented in a standardized manner and an agreed process for progression	People become ready to learn when they are confronted with tasks and problems. The facilitator therefore needs to help the learners to identify their learning needs in relation to their learning tasks and training material needs to accommodate this.
Orientation to learning – problem vs subject centered	Learners see education as a process to obtain course content that can be used in the future. The learning material therefore needs to be grouped in units related to the subject or topic	Learners see education as a process in developing competencies that they want to apply immediately. Learning should be presented to develop competence and performance needs of participants and sponsoring organisations.

Source: Knowles (1980)

Knowles (1980) developed these assumptions about adult learners based on the changing nature of an individual's self-concept as they move from being dependent to self-directed in a learning environment. As adults learn and gain experience this becomes a resource for further learning. Their readiness to learn is influenced by their roles in society and the workplace. They also move from future application of knowledge to immediate application. According to Jarvis (2010) Knowles continued to re-theorize andragogy and added a fifth assumption regarding the motivation of the learner to learn and eventually a sixth assumption about the learners need to know. In this regard Tusting and Barton (2003) express the need for educators to ensure that learners from marginalised or socially difficult environments basic needs must be met before learning can take place successfully in a formal environment.

Within this study the assumptions made about the characteristics of the adult learners will be explored to determine how these assumptions contributed to the participants learning or acted as barriers to learning within the NPO where the research was conducted.

Humanistic theories

Humanistic learning theory according to Merriam and Bierema (2014) had a substantial impact on the development of adult learning theories such as andragogy, self-directed and transformative learning. The foundation of Knowles model of andragogy according to Jarvis (2010) is both humanistic and idealistic. Tusting and Barton (2003) argues that andragogy and other similar models that explain transformation and development of individuals are based on humanistic theories such as that developed by Maslow and Rogers. They both identified that individuals have an inner need to achieve growth and self-direction, which Rogers called an

“actualizing tendency” and Maslow “self-actualization”. The result of this is to improve their circumstances through learning. In this regard Rogers (as cited by Merriam & Bierema, 2014) is acknowledged for the development of the “student -centered vs teacher centered methods where the trainer is a facilitator rather than a provider of knowledge. Rogers (as cited by Merriam & Bierema, 2014) believed that humans had the potential to grow and develop and that they have the freedom to make choices and decide on their own behavior.

Humanistic theories according to Tusting and Barton (2003) therefore suggests that humans have an internal drive to develop themselves and that this aspect needs to be nurtured in education and training environments. They highlight that learners that are from marginalised communities or socially difficult conditions and basic needs such as hunger, thirst, illness and tiredness because of a lack of rest must first be addressed before learning can take place. This includes creating a learning environment for these learners to feel safe and included in the learning process.

Consideration must also be given to these learners’ previous experiences in learning environments.

As the participants in this research project were from previously marginalised communities, the institutional, organisational and social learning environments will be explored to determine how it supported or inhibited the participants in the TPET learning experiences.

Critiques of andragogy

Knowles (as cited by Baumgartner et al., 2003) introduced his assumptions about adult learners in 1970 and it was initially accepted, criticized and still causes debates after all these years.

According to Baumgartner et al. (2003), the definition of andragogy is problematic as it does not clarify whether it is a theory of learning, teaching or a philosophical method as it does not meet the required criteria of each of these concepts. It however can be used by facilitators that want to use a more humanistic method when working with adults. According to Baumgartner et al. (2003), Knowles responded to the criticism and changed his perspective of andragogy as an adult learning theory to a framework of assumptions. According to Knowles (1980) his assumption is on a continuum with pedagogy opposing andragogy and that the learning situation and the learners decide the use of his assumptions. Hanson (as cited by Tusting & Barton, 2003) questions whether there is a need for an adult learning theory. According to her there is no significant evidence that adults learn differently from children. The differences because of age and experience according to her is insignificant.

Knowles (as cited by Lee, 2003) developed his adult learner characteristics mostly from educated, middleclass, white learners in structured adult programmes during the 60's and 70's. He therefore excluded from his framework large segments of the workforce consisting of females, different race groups, cultures, foreigners and marginalised people. It therefore raises the question of how the historical and social context in which Knowles (as cited by Lee, 2003) developed his assumptions impacted on it. In Lee's (2003) studies of the meaning making process and the cultural impact of it amongst Taiwanese foreigners, he identified cultural values such as the respect for authority, contributing to wellbeing of the group, the value of qualifications and the role of men within the culture as influencing every aspect of the meaning making process and the context in which it took place. Lee (2003) therefore concluded that the learners and their complete meaning making process was socially and contextually constructed.

According to Lee (2003), andragogy makes the incorrect assumption that adults can be self-directed learners and ignore their social and cultural context. Flannery (as cited by Lee, 2003) refers to this error as a universality which results in assumptions about a group being applied to a whole population. The error of universality according to Lee (2003) is usually made by researchers from privileged backgrounds who are unable to see different realities to their own. In generalizing about the characteristics of adult learners he strengthened the rights of the group he represents and muted the values and knowledge of the marginalised groups that have been excluded from education. Andragogy, according to Lee (2003), is therefore an example of universality, representative of the advantaged instead of representing the characteristics of most adult learners.

Calder (as cited by Tusting & Barton, 2003) draws attention to the fact that some adults could have negative experiences from previous learning that may make them reluctant to participate in formal learning. It is also noted that adults have other responsibilities in terms of their families and communities and resource constraints which needs to be accommodated before participating in formal learning.

Self-directed learning

Humanism is the primary basis for self-directed learning according to Baumgartner et al. (2003) and it is also supported by behaviorism and neo behaviorism. Therefore, the goals of self-directed learning are reliant on the theoretical perspective from which it is defined. Caffarella (as cited by Merriam & Bierema, 2014) proposed four goals for self-directed learning which Baumgartner et al. (2003) combined into three definitions. These definitions explain self-directed

learning as a goal, a process and as a personal attribute. In terms of being a goal it explores developing the ability of the learner to be self-directed in their learning activities, to nurture transformative learning and to advance emancipatory learning and social activities. As a process it consists of learners taking ownership for planning, conducting and assessing their own learning. As a personal attribute it relates to the learners' willpower to continue learning while fulfilling goals, curiosity and deriving satisfaction from it.

In terms of self-directed learning as a process, Knowles (as cited by Merriam & Bierema, 2014) developed a process that may be used to develop a learning contract for learners and facilitators to manage self-directed learning consisting of developing a relationship of combined respect and support, deciding on learning needs, developing learning objectives, identifying required resources, deciding on suitable learning activities and assessment of learning achievements. Spear and Mocker (as cited by Merriam & Bierema, 2014, p. 66) challenged the process as identified by Knowles which they termed "organizing circumstances". According to them self-directed learners rather choose from the available options in their environment to develop their learning activities. Learning therefore moves between different activities that in the end forms a logical whole for the learner.

With reference to the definitions of self-directed learning as a goal, process and personal attribute Baumgartner et al. (2003) refers to three self-directed learning models which consists of Tough's sequential model, Brockett and Hiemstra's interwoven model and Grow's instructional model.

Costa and Kallick (as cited by Merriam & Bierema, 2014), developed criteria consisting of self-management, self-monitoring and self-modifying for facilitators and learners to do a self-assessment of self-directed learning which drives the process. Baumgartner et al. (2003) refers to scales of readiness for self-directed learning as developed by Guglielmino and Oddi that measures personality characteristics, ability and attitude that forms the basis of self-directed learning according to them. According to Merriam and Bierema (2014) self-directed learning is used in organisations as a process to enable competitiveness and to adapt to change. Oh and Park (as cited by Merriam & Bierema, 2014) therefore highlight the importance of organisations to promote self-directed learning amongst their workers.

Brockett and Heimstra (as cited by Tustin & Barton, 2003) cautions that there is a difference between instructional methods that are self-directed and self-directedness as a personality attribute. There is, according to them, a positive relationship between self-directed learning and the learner's self-esteem as well as self-direction and contentment with personal life situations. According to them self-direction includes critical self-reflection. Candy (as cited by Tusting & Barton, 2003) refers to learning as a manner of searching for meaning in life. As a result, the importance of learning to the learner is more significant than how much has been learned. He recommends that the impact of power, social and cultural challenges needs to be considered in how it limits learners' freedom and choices. In this regard Baumgartner et al. (2003) refers to criticism towards self-directed learning as it reflects individuality and independence which are associated with western white standards. Other sociocultural contexts need to be considered where the social values require the group to be more important than the individual. This aspect

could influence the development of individual learner contracts as they could be developed in a group context and therefore contain standardized objectives.

Learning how to learn

According to Tusting and Barton (2003) self-directed learning has contributed to the concept of adult learners understanding their own learning processes and how to direct them. Smith (as cited by Tustin & Barton, 2003) identified four assumptions about adult learners which consist of their different approach to learning as children, the experiences they have gained which become fundamental for new learning, the impact of their private life cycles and the transition required within it, the impact of learning because of previous negative experiences.

Informal learning

According to Tustin and Barton (2003) informal learning and self-direction overlaps. Informal learning refers to learning that takes place outside of formal learning organisations, it is spontaneous, unstructured and non-accredited.

Coffield (as cited by Tustin & Barton, 2003) refers to formal learning within institutions as minor in contrast with informal learning. Informal learning within the workplace is sometimes more important than formal learning to complete work productively.

According to McGivney (as cited by Tustin & Barton, 2003) informal learning has major benefits as a pathway to formal structured and accredited learning. Foly (as cited by Tustin &

Barton, 2003) argues that there is a link between learning within social struggles and the ability it creates in changing power associations.

Planning programmes and transfer of learning

Considerable amounts of money are spent annually on training and development in the workplace according to Merriam and Leahy (2005). They estimate that the return on this expenditure only results in about a ten percent increase in the workplace performance of the learners. Merriam and Leahy (2005) reviewed various literature on the transfer of learning from different disciplines. Baldwin and Ford (as cited by Merriam & Leahy, 2005) identify three variables that influence the transfer of learning, consisting of the characteristics of the learners, programme planning, and work environment. Based on these variables they make three recommendations aligned with adult education and learning theories. This consisted of the involvement of learners in the programme planning process, including transfer of learning activities in programme planning and the development of supportive structures to facilitate transfer of learning. They use the transfer of learning definition, developed by Detterman (as cited by Merriam & Leahy, 2005), which described transfer of learning as the amount in which a learner's performance will be replicated in new circumstances. Detterman (as cited by Merriam & Leahy, 2005) also differentiates between near and far transfer as well as deep and surface structure transfer. According to Misko (as cited by Subedi, 2004) near transfer refers to repetitive steps following each other in performing tasks. Far transfers refer to the application and adjustment of new learning in different situations which is more challenging. Detterman (as cited by Merriam & Leahy, 2005) separates between surface and deep structure as similar situations but information is presented in different designs. According to Detterman (as cited by Merriam

& Leahy, 2005), far transfer of deep structure is the most desirable level but also the most challenging to achieve.

Participants characteristics listed by Merriam and Leahy (2005) based on a literature review consisted of motivation, managerial support, participants work expectations based on training results and personality traits. Transfer of learning is positively linked to the learners' pre-course motivation, the learning that took place and increase in learners' work performance. Motivation is also linked to the learners' confidence, competence and the relevance of the learning content to enable application in the workplace. In this regard support from supervisors and management becomes very important to facilitate transfer of learning. The learners' expectations of how the employer will respond to their results also impact on their willingness to transfer learning to the workplace. According to Baldwin and Ford (as cited by Merriam & Leahy, 2005, p. 7) the personality traits that can determine transfer of learning and work performance are "conscientiousness, openness to experience, extraversion, emotional stability and agreeableness". Learners with positive prospects will therefore try to transfer learning to the workplace. Those learners with low levels of motivation and who had negative experiences related to their training will unlikely get involved in the transfer of learning.

Programme planning and development according to Merriam and Leahy (2005) influences transfer of learning. In a review of relevant literature Sum (2007) developed a systematic framework (Table 3) for programme planning and implementation. This framework included the interactive model for programme planning as developed by Caffarella (as cited by Sum, 2007) in 2002. According to Caffarella and Daffron (2013) education and training programmes within

organisations are undertaken to promote personal development of employees; to help people to adjust to challenges in adult work life; to develop skills for current and future work outputs; to help organisations to implement business strategy and cope with change and to contribute to social transformation.

Table 3

Programme development

<p>Programme development</p> <ol style="list-style-type: none"> 1. Organisational needs analysis and context 2. Training needs analysis 3. Training budget 4. Development of learning material <ul style="list-style-type: none"> - Learning outcomes/objectives - Learning content - Develop learning modules and timetables <ul style="list-style-type: none"> - Instructor manual & learner reference guides - Training aids/media - Training equipment - Facilitator qualifications and registrations - Assessment and moderation instruments
<p>Programme implementation</p> <ol style="list-style-type: none"> 1. Programme administration and marketing 2. Programme delivery <ul style="list-style-type: none"> - Venue requirements - Facilitation, learner centered - Learner motivation and transfer of learning
<p>Programme assessment (based on Kirkpatrick's evaluation level)</p> <ol style="list-style-type: none"> 1. Re-action of learners 2. Increase in abilities and motivation 3. Skills application in the workplace 4. Impact on organisational results 5. Calculation of return on training investment

Source: Sum (2007)

The work place according to literature reviewed by Merriam and Leahy (2005) has become a very important factor as to whether transfer of learning will take place. There are several variables that influence transfer of learning such as the opportunity to apply new knowledge and skills, rewards system, support from supervisors and peers and the work climate. According to Rouiller and Goldstein (as cited by Merriam & Leahy 2005), supervisory and peer support is a better forecaster of transfer of learning than what the learner has learned. Brinkerhoff and Montessino (as cited by Merriam & Leahy, 2005) argued that the transfer agreements between facilitators, learners and management pre, during and post course was an essential requirement for transfer of learning to the workplace.

Programme planning and the transfer of learning processes within the NPO where this research was conducted seemed to have created major challenges for the participants in the TPET and their learning experiences. The implementation of the TPET at the NPO could also have impacted on their career development programme for instructors and influenced their compliance to maintain accreditation as a training service provider.

Curriculum design and development is an integral part of programme planning and transfer of learning. In the next section this aspect will be reviewed.

Curriculum design and development

The planning of educational programs according to Kelly (2009) is a more refined process than what most programme planners will admit to. Political intervention and representation has meant that most debates about educational curriculums has progressively become meaningless and

silenced. In this regard central planning and control through assessment and checks have become part of a forced implementation process of the planned and received curriculum. John Kerr (as cited by Kelly, 2009) defines curriculum as all the learning that takes place within or outside an institution irrespective if it happens with an individual or in a group.

Kelly (2009) emphasizes that a definition for an education curriculum should include at least the following measurements of planning and practice: the objectives of the developers, the process to be used for the implementation of the developer's objectives, the learner's experiences based on the educator's efforts to implement the developer's objectives and the unforeseen learning that has transpired as a by-product of the curriculum process. This then will result in a definition of curriculum that consists of all of the experiences the learner has had as a result of the learning delivery process.

The way we define curriculum according to Ornstein and Hunkins (2014) mirrors our approach to it. They refer to five basic definitions that relates to a linear process for reaching goals, facilitating the learner's experiences, a system for dealing with people, a field of study with its own body of knowledge and in terms of specific functional subject matter. It also replicates our understanding of educational institutions and society. They outline the following approaches to curriculum grouped as behavioral, managerial, systems which includes total quality management, academic, humanistic and conceptualist. In terms of evaluating curriculum, they emphasize the challenges involved in the process. Evaluation and the use of its results are based on value judgements. It influences the decisions on what data to collect and how it is interpreted.

This aspect therefore makes curriculum evaluations challenging in terms of the achievement of which standards and for whose benefit.

To conduct curriculum evaluations Harriet Talmage (as cited by Ornstein & Hunkins, 2014) formulated the following key questions to be considered: What inherent values of respect and acceptance are covered; what helpful values are related to the curriculum outcomes and the target group; what improvements were made on the curriculum that it replaces; what alternatives was considered in improving the curriculum; what consideration was given to the previous questions in the assessment process. The evaluation process should enable decisions regarding reviewing or replacing the curriculum, assessment of learners and facilitators and the learning that took place. It should also assist in determining whether the current management in the training institution should be maintained, restructured or replaced. Most of these issues to be considered relates to the programme planning process in the implementation of the TPET by the NPO and the participants experiences thereof.

Barriers to learning

From the informal discussions with the participants in the TPET some of the issues raised seems to be related to various barriers of learning. The literature on barriers to learning will therefore be reviewed to classify the issues experienced by the participant and to develop recommendations in this regard.

Cross (1981) developed a classification of barriers to learning consisting of situational, institutional, and dispositional barriers. Fagan (1991) refers to these classifications as life factors

(situational), structural factors (institutional) and learner inherent factors (dispositional) which needs to be considered.

Life factors consists of external influences on the learner that is outside of his/her control. These influences are usually family and work-related responsibilities as a result of the various roles and positions that learners also fulfill within their households, families and communities. These factors compete with the amount of time and finances a learner is prepared to invest in learning activities. Family support is also significant especially if the learner must travel to attend classes.

Structural factors originate from how the learning institutions have designed and presented the training programme's learning activities. Barriers relate to entry requirements and registration processes, timetables and sequencing of learning activities and the support services provided such as access to libraries, computers, student support, counselling and transport.

Learner inherent factors relate to a learners' perceived ability to overcome hurdles in enrolling, attending and completing learning activities successfully in the required timeframe. These dispositional barriers relate to the learner's self-esteem and attitude toward the value of learning and the benefits of it, negative learning experiences of the past and the perceptions learners have toward the learning institution and its staff.

Rubenson and Desjardins (2009) propose what they call a bounded agency model where the state, through policy measures can have a direct impact on structural barriers and influence learner's decisions in terms of learning options available to them. They refer specifically to

neoliberalism and the structural barriers (institutional and situational) it can create in relation to the need of organisations to train their staff. In overcoming these barriers adult learner's perception of dispositional barriers can be affected negatively.

Groener (n.d.) argues that the state has a responsibility to address inequality through adult education as highlighted by Rubenson, Desjardins and Milana (2006). The continued structural disparity in South Africa provides an opportunity to explore and analyze the socio-political influences on remaining structural and institutional barriers preventing entry to adult education for black people. This analysis should include the barriers that have already been addressed and the steps to be taken to resolve the remaining disparities.

Within the South African context Landsberg et al. (2016) proposed the use of the Bronfenbrenner bioecological framework to facilitate inclusive education within a developmental context and highlight barriers to learning consisting of socioeconomic barriers, educational barriers, literacy barriers, attitude and impairments that contribute to learning barriers.

To create an understanding for inclusive education Landsberg et al. (2016) emphasises the interaction between an individual and the various other systems that the individual is linked with. This can be done by using ecological systems theory for which they propose the Bronfenbrenner framework. This framework is a multidimensional and contextual model of human development. This model proposes different levels of interconnected systems that cause change and development. What happens in one system influences the other causing complicated

relationships and influences inclusive education. Development challenges can therefore not be excluded from the challenges of social issues that contribute to barriers of learning in a developing country such as South Africa. The Bronfenbrenner framework consists of four dimensions consisting of proximal processes, person characteristics, systems/context and time.

The socio-economic issues according to Prinsloo (as cited by Landsberg et al., 2016) that contribute to severe barriers to learning and determine the world in which learners live are the following:

- culture of poverty and the low levels of development and resulting marginalisation, moral collapse, poorly or unplanned urbanisation, lack of work opportunities resulting in unemployment with little hope for the future.
- Decay in family life and disintegration of families
- The weakening of morals and ethics
- An increase in violence and child abuse
- The impact of an HIV/AIDS pandemic
- Cultural diversity and different languages

The focus of assessment according to Boucher (as cited by Landsberg et al., 2016) has changed from assessing the learner through the assessment of the learning to the assessment for learning. This approach focusses on learning as a process, rather than on the outcomes of the learning. This approach is to assist in identifying learners that experience challenges with the learning process. The goal of assessment when learners seem to have some challenges is to get

information to understand their needs for support and the development of support strategies. The following assessment framework can be used in this regard:

- Develop an understanding of the actual situation and the learner's interaction within this context
- Identify learner's self-assessment activities and response to assessment results
- Identify the learner's strengths
- Identify areas for support and resource needs
- Facilitate support and enable the learner
- Facilitate the learner's access to the provided support and resources
- Address life skills challenges of learners which includes reading, writing and computer skills

Language is multidimensional according to Bouwer and Dedman (as cited by Landsberg et al., 2016) and is used to communicate with other humans who knows the language system. The characteristics of language are that it is complicated and controlled by rules, it is also a shared coding system and a social instrument. In terms of learning, a distinction is made between conversational and academic subject specific language or vocabulary. In comparing spoken with written language, spoken language is "context embedded" and written language is "context dis-embedded".

When referring to literacy it entails more than just reading and writing. Literacy is critical in the "cognitive-cum language" development instead of just dealing with reading, writing and

spelling. It has a major impact on the objectives for learner support in writing a language for academic purposes.

According to Nel and Nel (as cited by Landsberg et al., 2016) language influences all learning. Only about 9% of South Africans use English at home. Irrespective of the Government project to promote multilingualism, English and Afrikaans remain the main language choices in learning and teaching with most preference being given to English. Because of poverty in South Africa and the struggle to survive, language development in socioeconomic marginalised communities are limited and further compounded by low English literacy levels of parents and caregivers.

Conceptual framework

This study explored the programme implementation process, reviewed the implemented curriculum and explored candidates' experiences of learning and barriers faced in learning via the lens of the enclosed conceptual framework diagram. This conceptual framework was drawn from parts of the literature review.

To explore the implementation process of the TPET within the NPO and the impact it had on the participants learning needs, the eleven areas of the Caffarella and Daffron's (2013) interactive model of programme planning and development will be used. It is anticipated that specific needs will surface in this process and whether it was addressed in the implementation process.

Specific attention will be given to the participants' experiences within the context of Knowles et al. (2015) application of the core adult learning principles in applying the nine principles of the Caffarella and Daffron (2013) model and how they related to it.

The current curriculum will be reviewed using the Ornstein and Hunkins (2014) key questions to determine what changes are required to facilitate a better learning throughput. In view of the quality assurance approach followed by SAQA, a managerial systems approach will be followed based on quality management systems.

The barriers to learning as identified by Cross (1981) will be explored with each of the selected participants interviewed to determine the impact of these or any other barriers identified by them on their results. The barriers experienced by the learners will be explored as situational, institutional and dispositional.

The research questions are as follows:

- Why was the Training Programme for Educators and Trainers implemented in this Non-Profit Organisation?
- What was the programme implementation process?
- How did participants respond to the programme and what were their learning experiences?

Table 4*Conceptual Framework diagram*

Programme planning and development Eleven areas of outputs Caffarella & Daffron	Curriculum evaluation Four key elements Ornstein & Hunkins	Barriers experienced to learning Classification of barriers Cross & Fagan
<ol style="list-style-type: none"> 1. Context in which planning takes place 2. Development of support for the training programme 3. Needs analysis to determine programme content and priorities 4. Setting goals and supportive objectives 5. Deciding on instructional methodology 6. Transfer of learning 7. Assessment of learning 8. Programme format 9. Timetables and facilitators 10. Training budgets 11. Marketing of programmes and detail of previous processes 	<ol style="list-style-type: none"> 1. Values of respect and acceptance covered 2. Helpful values related to outcomes and target group 3. Improvement of the curriculum it replaces 4. Alternatives to improve curriculum 	<ol style="list-style-type: none"> 1. Situational (life factors) 2. Institutional (Structural factors) 3. Dispositional (Learner inherent factors)
<p>Adult learning principles (Six assumptions about adult learners) Malcolm Knowles</p> <ol style="list-style-type: none"> 1. Knowledge needs 2. Self-esteem 3. Previous learning experiences 4. Motivation to participate 5. Development of learners to be self-directed 6. Situation towards and understanding need to participate in learning activities 		

Conclusion

This chapter has emphasized the main concepts related to the topic of this study such as the context and the policy landscape, related studies that influenced the referencing and initial literature reviews and the development of this study. Workplace learning was reviewed with the rising trends and perspectives, current concerns in adult learning, adult learning theory in the workplace and the various learning models from psychology and adult education with a critique of andragogy. Self-directed learning was reviewed, learning how to learn and the role of informal learning. Planning programmes and transfer of learning was reviewed with its overlap with curriculum design and development. Barriers to learning were reviewed with an inclusion of a South African perspective. The conceptual framework was presented based on the literature reviews and how it related to the research questions that needs to be answered within this study.

The next chapter will review the research design and methodology used for conducting this research project in answering the research questions.

CHAPTER III. Research Design and Methodology

Introduction

The purpose of this chapter is to present the methodological reasoning for the research design and the methods used within this research project. This explanation is done under the following headings of research orientation; positionality of the researcher, research design; research format; qualitative case study approach; sampling; data collection methods; semi-structured interviews; documentation review; data analysis method; limitations of the study; ensuring quality; ethical considerations and a short conclusion.

Research orientation

In discussing the differences between scientific theories, generalized reasoning and research Babbie (1995) refers to the French philosopher Auguste Comte's view that research is possible on people in a logical and rational manner. This approach contributed to the development of the social sciences, which he named positivism. In describing post – positivism he however questions the assumption that people will always behave in a rational manner. This criticism of positivism contests the objectiveness of researchers as the ideal in scientific research. According to Babbie (1995), most scientists have reached consensus that individual perspectives determine the problems they decide to investigate, how they witness it and their findings. He therefore raises the question whether social life conforms to rational principles at all and the rich possibility of the different theoretical perspectives that are available in researching people.

According to Henning, van Rensburg and Smit (2004), researchers moved away from the positivism framework in studies that attempted to understand the lives of people to an interpretivist framework. The purpose of positivism is to find the truth where interpretivist attempts to identify reality or the multiple realities that exists. In terms of realities Babbie (1995) classifies two realities, one based on own experience and another based on agreement. According to him reality is therefore complicated, science therefore make provision to discover reality in the form of epistemology as the science of knowing, and methodology as the science used to find out.

According to Popper (as cited by Henning et al., 2004) the purpose of science should be to disprove and not to prove. The interpretive framework therefore supports the use of a variety of data collection methods from different sources to improve validity. Interpretivists believe that different perspectives creates different realities and it is therefore not possible for one person to interpret the world objectively. Multiple imperfect perspectives may give a better insight to reality as people use their personal prejudices and perspectives to guide their activities and to rationalize it.

Acquiring knowledge within the interpretive framework Henning et al. (2004) states, that knowledge is created not only by what we observe but also by our intentions, ethics and beliefs as we attempt to make meaning. The researcher therefore needs to look at a variety of places and things to understand the created knowledge frameworks. Knowledge frameworks therefore need to be questioned to understand how people make meaning but also what meaning they are

making in their lives. Researchers in this paradigm need to be aware of the influence of context in creating meaning and the political and power relationship consequences thereof.

The interpretivist framework therefore has methodological implications to obtain insider knowledge to construct the world in using multiple views. This framework can therefore be used to reconstruct people's worlds through action and reflection according to Paulo Freire as quoted in Henning et al. (2004)

In this study it is therefore anticipated that the instructors who participated in the research will have experienced different situations with the implementation of the training programme for educators and trainers. They will also find varying usefulness of the course content within the classroom and the barriers they individually have experienced to learning. To develop an in-depth understanding of their experiences, a mixed data collection methodology was used. The data was generated from document reviews and semi-structured interviews. It enabled a rich description of organisational and participant experiences on the implementation of the training programme for educators and trainers.

Positionality of researcher

The hierarchical position of the researcher in the NPO and the power relationships it creates with the participants is acknowledged. This aspect creates challenges in terms of previous work-related interactions and the preparedness of the person being interviewed to share personal information or information that can possibly discredit them. It also raises other differences or issues related to age, gender and race. In this regard Holland and Ramazanoglu (as cited by

Seale, 2004), raises the aspect that interviews are artificial social procedures and that age, gender, race, culture and religion influence the interaction and understanding between the researcher and the person being interviewed. In this study it will not be possible to do the required race and gender matching. This aspect is addressed as it is possible that some of the barriers to learning experienced by the participants in the TPET could be related to transformation issues within the NPO. I will, however, spend considerable time making participants comfortable with the research process and assuring them that no harm or negative work consequences will arise for them from the research process. I will also explain to them that I'm only interested in their past learning experiences of the TPET programme and that such findings may help the organization to address some of the barriers they face. They will be assured of total confidentiality throughout the study and beyond.

The researcher of this study is a white South African male born in 1953. He grew up in a small town in the Northern Cape and experienced the implementation of the apartheid system, which also resulted in completing compulsory national military service and deployment in Angola. He was employed by an international Non-Governmental Organisation in South Africa for the past twenty-three years, has developed and implemented a number of training-based development projects in South Africa and in nine other African Countries.

His experiences working in marginalised communities in training and development projects influenced this research project. His position is therefore to learn from the participants to develop a better understanding of their challenges in adjusting to a fast-changing regulated work and

community environment and the training support to be provided in coping with these challenges successfully.

There is therefore an awareness that in formulating the data collection process and analysing the data that it can be influenced by previous experiences, personal values and ethics. These personal biases can therefore also influence the interpretation process. However, the researcher will endeavor to let the data, rather than previous experience and position, to be paramount in arriving at findings and analysis.

The researcher holds an idealistic worldview and belief that as our experiences change it will also change our view of the world in terms of religion, politics, economics and its interplay.

The researcher is therefore dependent on his supervisor for critical feedback regarding the data collected, its analysis and the formulated findings and recommendations.

Research design

According to Henning et al. (2004), the research design of a study must align to the methodological requirements of the research question, the data required and the format of analysis to obtain relevant findings and conclusions. She therefore defines methods as the way of doing, and methodology as a combination of methods that support each other. This combination of methods must have the ability to provide data and findings aligned to the research question and research purpose.

Research format

According to Rule and John (2011) in the broad tradition of research, there is quantitative and qualitative research design formats. According to Seale (2004), quantitative research is mostly deductive and attempt to establish the relationship between variables. The validity and reliability of the data to be collected must be determined in the design stage of the study. In contrast, qualitative research is mostly inductive and research findings are based on the data collected and analyzed. In a qualitative design, the validity and reliability must be demonstrated in the findings of the research. The key in research design is therefore the manner in which the research questions have been formulated. Rule and John (2011) distinguish between qualitative and quantitative research in terms of the data required for the study and therefore the method used to analyse it. According to them, the purpose of research within the social sciences is to develop an understanding from the researched perspective in terms of their behavior, thoughts and experiences and therefore the subjectivity of qualitative research is more suitable than the objective truth of quantitative research.

In this study, the orientation to data and its analysis is qualitative to enable a deep understanding of the non-profit organisation, the implemented training programme and the participants' learning experiences. A multiple data collection method was used to answer the research questions.

Qualitative case study approach

Rule and John (2011) refer to a case study as a research approach that can assist in developing an in-depth understanding of a phenomenon by highlighting its interaction with a wider context in

which it is situated. This approach can assist in investigating an identified issue within a small location and produce an understanding of the case under study. This will assist to develop or test theoretical perspectives related to the case study. Case studies can also provide information that can be used to give an understanding of other larger, similar phenomenon, and to highlight wider theoretical perspectives. Case studies therefore have specific advantages related to developing an in-depth understanding, it is adaptable and controllable.

The research approach for this study will be a qualitative single case study with a multiple data collection method. This will enable an in-depth understanding of the Training Programme for Educators, Trainers, and the course participant's experiences during their participation in the programme.

In this case study the researcher was also an observer participant as a result of his involvement with the Non-Profit Organisation and his interest to improve the learning management system. The researcher was a member of the training group and simultaneously its researcher. This role was therefore different to that of an outsider researcher. According to Rule and John (2011) this case study will therefore have an intrinsic approach as the researcher has an interest in the case itself and wants to develop a better understanding of it. It will also meet the requirements of a historical case study as it provides hindsight from the current position within the NPO and identify trends or themes from the history of the case.

According to Babbie (1995) and Mouton (2001) the unit of analysis should also be the unit to be observed directly or indirectly. This will enable descriptions and if necessary, the ability to

determine differences between the units observed. It is important to determine and have clarity about the unit of analysis to prevent making assumptions based on the observation of other units. Babbie and Mouton (as cited by Rule & John, 2011) emphasize this aspect. The case and the unit of analysis will be the Training Programme for Educators and Trainers and the focus will be the curriculum and participants' experiences in the programme.

Sampling

To be able to generate an in-depth and reliable report of the case a purposive sampling process was used as explained by Rule and John (2011). This resulted in the selection of four candidates that met specific criteria such as their location, organisational accessibility and willingness to participate and therefore maximize their contribution. According to Rule and John (2011) the selection of the right participants contributes to the successful completion of a case study. As proposed, a pre-screening process consisting of initial interviews and reviewing course results of the participants in the three cohorts were used to select four participants for this study.

The purposive sample consisted of two successful African female participants from Cohort 1 (2009, Gauteng group) who have completed all the TPET programme modules successfully and had been awarded a UNISA certificate of competence. Both these participants proceeded to complete the ODETDP 5 qualification successfully as initially conceptualized by the NPO.

The two unsuccessful participants, an African female and Coloured male were selected from Cohorts two (2010, Gauteng group) and three (2011, Western Cape group). These participants had not completed the required course work and was found not yet competent on some or all the

modules. The participant from the Western Cape group afterwards, proceeded to complete other qualifications at higher levels successfully. The participant from the Gauteng group was however not able to continue with any further vocational development.

Table 5

Data collection and analysis process

Sources	Data Collection Methods	Data Analysis Methods
Participants Successful Unsuccessful	Two Semi-structured in-depth interviews – first interview theme based and second for clarification purposes	Content/Thematic analysis Content/Thematic analysis
Documents	Monitoring reports, course evaluation result, policy and mandatory requirements	

Data collection methods

According to Rule and John (2011) the purpose of the study and the key research questions will determine the data that needs to be collected. The source of the data will determine the methods that can be used in collecting and organizing it. The data collection methods that were used in this research project consisted of semi-structured interviews and a document analysis of the selected participants training records. This was done to ensure a rich and in-depth analysis of the data collected. According to Rule and John (2011) in their discussion of these two methods recommend that it can be used to supplement each other in a case study and also be used for triangulation. Their recommendations are discussed under the following headings.

Semi – structured interviews

Questions explored during the interviews were personal factors of the participants during course participation; institutional support for the TPET participants; organisational support in participating in the TPET; relevance of the TPET content to the NPO training system. After the first interview the questions for the second interview were finalized around more specific themes in support of the key research questions.

According to Rule and John (2011) semi-structured interviews will require the development of preset field questions as an interview schedule to facilitate discussions related to the key research questions. This should facilitate opportunities to probe some of the information shared during the interview. They also provide a guideline to be used to ensure that a good and ethical interview is conducted. John (2009) proposed an interviewing process consisting of two interviews. The first interview can be used to obtain more information about the individual and their personal lives while the second interview can be used to obtain more information about their work lives and experiences.

According to Henning et al. (2004) the interviewer and the participants become co-developers of the data collection process and the meaning that is attached to it. As the interviewer has inside knowledge of the training system within the NPO and knows the participants personally, interview questions were influenced by this knowledge and gaps or silences in the information provided by the interviewees were explored to obtain consensus or an understanding of differences. Henning et al. refer to this as a conversationally oriented interview or a discursive practice. Interviewing informally creates an opportunity to analyze the discourse in determining

the use of language and their social meaning in how participants make sense of their lives. This analysis was required to make sense of the data gathered and its deeper meaning.

Documentation review

According to Rule and John (2011) the review of documentation is a recommended start for data collection. This is recommended specifically if other methods such as interviews are also used for data collection. The documentation review can provide context to the study in terms of external compliance requirements, trends and also provides a paper trail of the history of the case study. Information obtained from the document review can also influence specific questions to be asked during the interviewing process.

In view of the above and in line with the research questions, the documents reviewed were therefore also purposively selected as recommended by Henning et al. (2004). This gave context to the study from different perspectives as a result of the researcher's knowledge of the NPO and the topic, as presented in Chapter four. For research questions one and two, various policy documents from SAQA, HWSETA and the QCTO were consulted dealing with occupationally directed education, training and development practitioners, occupational trainers, accreditation of training service providers, standard setting, quality management systems and curriculum development. This was supported by records in relation to the organisational implementation process. For question three, various documents related to the trainers such as the NPO's instructor certification programme progressive assessment reports, reports on monitored instruction, examination results and assessment reports were consulted to provide a sense of how these trainers responded and experienced the TPET.

Data analysis method

In data analysis, which is a process of interpreting information or text, Seale (2004) recommends the identification of main categories, important themes and the use of repetitive terms. This will assist to structure the data and order it to enable a process of critical analysis. Foucault (as cited by Seale, 2004) indicates that text can be analyzed according to the way it is presented, its layout and the relationship between the originator and receiver. He recommends that key themes need to be identified in the arguments or issues raised, variations in the text itself and the matters that the originator is silent about.

In this research project a thematic analysis was done according to the coding manual for qualitative researchers as developed by Saldanha (2016). The semi-structured interviews based on the research instrument were recorded and transcribed. The first cycle of coding consisted of single word, full sentence and paragraph coding. The purpose of the coding was to link the data to meaning. The coding used started with *vivo* coding, using the participants own language to support grounded theory. This was followed by eclectic coding to decode the meaning of passages. This was followed by pattern coding to look at repetition, routines, different participant roles, relationships and rules subjected to. Descriptive coding was used for opinions expressed by the interviewed participants.

The obtained codes were then consolidated into different categories to enable data analysis. Each category was used to develop a propositional statement supported and linked to verbatim samples taken from the transcribed interviews. This data was then consolidated in a template consisting of the research topic and supporting questions under the headings of themes; related

codes; supporting quotes that exemplify the theme (in vivo); theoretical and conceptual links; key concepts from theory and relevant quotes from theory to get a deductive perspective. This populated template was revised extensively before it was used to develop the semi structured interview findings in Chapter four.

The findings of the documentation review were presented separately from the semi-structured interview. This was done as it created context to the study and provided a framework of the compliance environment that the NPO needed to deal with and how the management thereof by the NPO and the tertiary institution influenced the participants experiences.

Limitations of study

The current limitations recognized for this study consist of time constraints, the geographical coverage; the fact that an interview is an artificial social procedure; possible challenges in ensuring the confidentiality of the interviewees as a result of the small sample and the reporting process. With each of these constraints the required steps will be taken to minimize the relevant limitation.

Using a historical case study approach with purposive sampling provides challenges in making generalizations in terms of the findings or applying the findings to other adult education programmes. Although the limited geographical sampling and the lack of random sampling can be seen as a limitation, it enables an in depth and rich description of the case. This in-depth description could however result in participants interviewed being recognized which will require according to Searle (2004) that the data analysis and storage processes be altered to ensure that participants remain anonymous. This will include the process of naming the tape recordings and

the transcripts developed from it. It is anticipated that other limitations could become evident during the data collection process such as the exclusion of other participants. According to Rule and John (2011) this is an acceptable limitation within a case study as it contributes to its in-depth analysis.

Ensuring Quality

Guba as cited by Rule and John (2011), proposed the concept of trustworthiness in qualitative studies as an alternative to reliability, validity and generalization as used within quantitative research. To achieve trustworthiness in this research project the suggestion made by Guba (as cited by Rule & John, 2011) regarding transferability, credibility, dependability and confirmability was adhered to.

Multiple data sources consisting of documents reviews and semi-structured interviews were used. The interviews with the participants were recorded, transcribed and made available to the participants for their input, comments and approval. To create an audit trail records were kept of the participants interview recordings, the transcripts of the interviews, the coding templates compiled from the transcripts and the thematic analysis. This process was reviewed and approved by the research supervisor for this project.

Ethical considerations

The Non-Profit Organisation where the research was conducted gave written permission for the study to be conducted on the condition that they remain anonymous.

Written informed consent was also obtained from the individual participants interviewed for the study. Participants were informed about the purpose of the study, their rights to decline participation and the assurance that they can withdraw at any stage of the process was emphasized. The interviews were recorded during the first interview to facilitate transcriptions. The required permission was obtained from the participants that during the second interview they will be given an opportunity to make corrections to the transcripts if required.

The semi-structured interviews were conducted using an interview schedule with pre-developed field questions to guide the interview. Questions explored included personal factors of the participants during course participation; institutional support for the TPET participants; organisational support in participating in the TPET; relevance of the TPET content to the NPO training system.

The semi-structured interview made provision for an introduction where the purpose of the interview was explained. The recording is confirmed as per the participants signed letter of agreement, the interview itself where questions are asked to guide the interview and data collection process and a conclusion to verify the main discussions that took place and to thank the participant for their participation, Gilham (as cited by Du Preez, 2008).

Conclusion

This chapter described the research design for this study, the positionality of the researcher, the research design, format, sampling, data collection methods and process, limitations of the study, trustworthiness and ethical considerations used during this study.

The next chapter will discuss the findings from the document review and a thematic analysis of the data obtained from the semi-structured interviews with relevant quotations and theorization of the findings.

CHAPTER IV. Findings and theorisation

Introduction

This chapter provides an overview of the data collected, the findings and its theorisation. Data was collected from selected documents related to compliance requirements and semi-structured interviews with selected participants of the TPET. A profile summary of the participants interviewed is included based on the available information on their organisational records which was accessible.

The sampling process was purposive to answer the following research questions:

- Why was the Training Programme for Educators and Trainers (TPET) implemented in this Non-profit organisation?
- What was the programme implementation process?
- How did the participants respond to the programme and what were their learning experiences?

To answer the question, why was the TPET implemented in this NPO, data was collected from documents which consisted of the Department of Labour's legislation and their supporting documentation related to the minimum requirements and standards for the presentation of first aid and emergency care courses; the NPO's Instructor Certification Programme and the records of the participating instructors; the Training Programme for Educators and Trainers and the SAQA qualification, National certificate: Occupationally Directed Education and Training Development Programme at NQF level 5.

The data collected in terms of programme implementation and selection of candidates, difficulties experienced by the participants, participants experiences of the programme content, implementation of programme content in the classroom and the changes in how participants feel about themselves from the semi-structured interviews will be presented under the following themes:

- Theme 1: Programme implementation and selection of candidates
- Theme 2: Participants experiences of the programme content
- Theme 3: Barriers to learning
- Theme 4: Implementation of learning in the classroom
- Theme 5: Changes in how participants feel about themselves

Key findings from the documents reviewed

Department of Labour

The National First Aid and Emergency Care Standards Committee in 1992 developed several minimum requirements and standards for the presentation of first aid and emergency care courses in South Africa. In 1993 the Occupational Health and Safety Act (1993) was promulgated. In terms of the General Safety Regulations of the Occupational Health and Safety Act, the employer must take reasonable steps to ensure that in the workplace when workers are injured they must receive first aid treatment if required. The first aider administering workplace first aid must have a valid certificate of competency issued by an organisation which has been approved by the Chief Inspector of the Department of Labour.

The minimum requirements and standards for the presentation of first aid and emergency care courses consisting of documents A – G. These documents became the compliance criteria for the approval of first aid training organisations by the Department of Labour. Document A (revised in 1999) contained the content, course duration and minimum instructor qualifications requirements for presenting first aid and emergency care courses. Document G, contained the minimum compulsory content of the course in instructional techniques, course duration, theoretical and practical training and assessment, entry qualifications, learner to facilitator ratio's and certification validity duration requirements. The minimum course content consisted of the principles and theories of learning, the role of the instructor, planning and preparation, instructional methods, evaluation and administration.

In terms of certification and validity duration requirements the instructor must present at least one course per year and be monitored at least every three years by the training organisation. Should the training organisation do not have capacity to conduct the monitoring they may use a Department of Labour approved first aid training organisation. Should an instructor not comply with the course presentation and monitoring requirements they will be required to repeat the programme in instructional techniques should they decide to continue as a Department of Labour approved instructor.

NPO Instructor Certification Programme

To meet accreditation requirements of the Department of Labour and its own instructor development needs the NPO developed its own inhouse instructor development programme. This

programme made provision for minimum entry requirements, an instructor programme (contact session) and a monitoring process.

The minimum entry requirement required candidates to be at least eighteen years of age, have a grade 12 certificate, good standard of English, a minimum of a valid level 3 first aid certificate, skills assessment, interviewed and recommended by the relevant training Centre that nominated the candidate. After being accepted, the candidate must also complete a pre-course workbook exercise which is assessed by the Instructor Trainer and Syndicate Leaders presenting the Instructors programme.

Instructors Programme

The instructors programme (contact session) is a forty-eight-hour programme presented over five days. The objective of the programme is to develop the participants to become qualified organisational instructors and meet the Department of Labour accreditation requirements. The programme concentrated on instructor orientation to the organisation, adult learning principles and its application, presentation skills, instructional techniques, coaching, assessment and counselling and demonstration skills. The programme has been developed to enable the participants to apply and practice new learning through several interactive activities during the contact programme. As the programme focuses on adult learning assumptions and instructional techniques it is required that the participants must have high levels of pre-course first aid skills. The pre-course skills assessment must therefore be done by a registered HWSETA assessor.

To be declared competent the participant must demonstrate the following:

- That they behave in a professional manner in the classroom.
- Apply adult learning principles in their presentations.
- Work productively as a training team member.
- Use appropriate questioning techniques to facilitate learning.
- Use training methods and adjust to the needs of the learners.
- Demonstrate willingness to learning and further self-development.
- Participate in peer assessment and give and receive constructive feedback.

Formative assessment of the participants is continuous and includes a daily individual debriefing session to discuss their progress and concerns. Summative assessment consists of a final presentation and a final debriefing to discuss participants final programme results consisting of one of the following four assessment results:

1. Progress: participant achieved course objectives and have demonstrated good presentation and technical skills. Must be monitored successfully for one day (eight hours) in a classroom situation to enable certification before being allowed to present a training course on their own.
2. Progress, to improve technical skills: the participants specific technical weaknesses are discussed, and agreement is reached on its improvement by assisting a qualified instructor on an agreed number of first aid courses before being monitored.
3. Progress, to improve presentation skills: the participants specific presentation weaknesses are discussed, and agreement is reached on its improvement by assisting a qualified instructor on an agreed number of first aid courses before being monitored.

4. No progress: participant's areas for development, remedial action is discussed, and agreement is reached to repeat the programme.

Should participants not agree with their final programme results, provision has been made in terms of the NPO's, HWSETA approved Training Quality Management System (QMS) to lodge a formal appeal.

Monitoring

To enable certification of new instructors, re-certification of existing instructors and compliance with its accreditation requirements, the NPO's requires annual monitoring. This is done by using a standardized template that is part of its QMS. Monitors are trained inhouse and externally and must register as assessors and moderators before being appointed as workplace monitors by the NPO.

The template makes provision for personal details of the person being monitored such as their full names, identify number, old and new qualifications details, topics used for monitoring, course number, number of leaners in the class and the date of the monitoring. The monitoring assessment process overlaps with observed workplace moderation as the instructor being monitored is involved in assessment of learners' skills.

The monitoring consists of the monitor (moderator) assessing the instructors' preparation (lesson plans, class layout and training equipment), course introduction (course preview, objectives and motivation), presentation (level, objectives achieved, demonstration clear and correct, questions,

participation, transfer of knowledge and appearance), practice session (coaching, problem areas, praise, questions, class control, use of space, time management and same standards for all), evaluation (transition to assess, transfer of knowledge and same standard for all), summary (objectives reviewed, assessment, time management and transfer of knowledge).

After completion of the monitoring there is a post monitoring discussion where the instructor's strengths and areas for improvement are discussed. Once consensus has been reached an overall rating is done consisting of the following:

1. Do not meet requirements
2. Meets requirements
3. Exceed requirements
4. Excellent

Based on the agreed rating the monitor makes a recommendation for initial certification of the new instructor, recertification of an existing instructor and the remedial work required and re-monitoring if required.

ODETDP 5

During 2000, SAQA introduced the Certificate (ID 13740): Occupation - directed Education, Training and Development Practice, level 5 qualification. In 2004 this qualification was replaced by the Higher Certificate (ID 48873): Occupationally Directed Training and Development Practices (ODETDP), level 5. The rationale for the Higher Certificate was to help address the education, training and development priorities in the South African environment which was

reinforced with legislation, educational policies and strategies. To be able to meet workplace training and development needs, competent trainers were required at various levels within organisations. This qualification was developed as a formative qualification for skills development facilitators in different specialization areas. The outcomes of the qualification enabled the ability to investigate areas of unsatisfactory work performance, the design and development of relevant training activities, presenting the required training, support the learners to ensure that learning takes place and assess the implementation of the learning and to manage the training system. It was expected that participants in this qualification will have suitable qualifications in the functional area they want to present training in, such as first aid or emergency care as relevant to this research project.

As this Higher Certificate consisted of unit standards it created opportunities for participants to complete part qualifications over time until they meet the requirements of the full qualification. It was also possible through recognition of prior learning (RPL) to obtain part or the full qualification.

The NPO anticipated that eventually this, or a similar part or full qualification, will become part of the SAQA accreditation process for workplace training service providers. As the NPO had to meet their operational training requirements and did not have the financial resources or capacity to reskill their instructors inhouse or on a full-time basis, it was decided to start a systematic process to upskill their instructors over a five-year period. In this regard it was decided to make use of a tertiary institution that offered a Training Programme for Educators and Trainers consisting of four unit standards of the ODETDP 5 qualification. Once this initial development

has been completed the best performing successful candidates, on an annual basis, would be financially assisted to complete the full qualification to build capacity within the organisation. This development process started in 2009 with ten experienced instructors from one of the NPO's training centres. The instructors were selected and nominated by the Centre's management team and met the tertiary institution's entry requirements.

TPET

The purpose of the TPET is to improve the understanding and competence (skills, knowledge and attitude) of workplace educators and trainers to present and assess skills programmes within their areas of specialization. The entry requirements are grade twelve or an equivalent qualification. It is presented over a one-year period in English only. The programme consists of four theoretical modules covering learning interventions, facilitating of learning, learner support and assessment. The modules are supported with a compulsory contact session at the tertiary institution. Formative assessment is done through two compulsory assignments as contained in the learner guides and a summative assessment on training practices requiring the completion of a portfolio of evidence. The first four modules uses four unit standards of the ODETDP (ID 48873) level 5 qualification and meet the requirements of a skills programme or part qualification although it was not accredited as such.

The NPO anticipated that this skills programme would be able to become a bridging and prerequisite for their instructors before enrolling for further skills programmes or the full ODETDP level 5 qualification. It was also intended to make use of a link pin system to build capacity within the NPO training system and simultaneously meet their current and anticipated

future accreditation requirements as a SAQA accredited training service provider. As indicated, some challenges were experienced by the participants and the programme implementation process which will be addressed by the second and third research questions.

TPET Respondent profiles

Trainer 1 (T1):

Is an indigenous (coloured) Afrikaans speaking male from the Western Cape. He is currently thirty six year old, married and has three children. His wife is employed fulltime and is a senior manager in a corporate organisation. He has been a first aid instructor for fourteen years and completed his National Instructors Training and Development Programme (NITDP) which is an inhouse instructors programme of the NPO where this study has been conducted in 2004.

Thereafter he completed a Basic Ambulance Assistant (BAA) course in 2005 and registered with the Health Professions Council of South Africa (HPCSA) as a basic life support (BLS) paramedic. Because of accreditation and compliance requirements applicable to the NPO, he enrolled and completed an assessor's course successfully and was registered with the Health and Welfare Sector Education Authority (HWSETA) as a first aid assessor in 2009. In 2010 he continued his studies as an ambulance emergency assistant (AEA) and upgraded his registration with the HPCSA as an intermediate life support (ILS) paramedic.

In 2011 he participated in the training programme for educators and trainers (TPET) where he did not complete for several reasons. He obtained recognition for prior learning in the BAA and AEA short courses and enrolled as a second-year student for the Emergency Care Technicians

(ECT) qualification. He unfortunately dropped out because of poor academic performance. He returned a year later to complete the qualification at his own cost in 2015. He upgraded his registration as an advanced life support (ALS) paramedic with the HPCSA. In 2017 he enrolled for a Management Development Programme (MDP) which he completed with distinction. He won the NPO first aid annual competitions three times and has been promoted as a unit manager.

Trainer 2 (T2):

Is a black (African) Xhosa speaking female from Alexandra, Johannesburg. She is currently forty-five years old, married and has three children aged 20, 12 and 2 years old. Her husband is employed fulltime. She completed qualifications in Ancillary Health and Home Care and Auxiliary nursing before joining the NPO. She has been a first aid and home-based care instructor for nine years and completed the Instructors Certification Programme (ICP) which have replaced the NITDP in 2008. She is registered with the South African Nursing Council (SANC) as a Nurse (Auxiliary). She also completed in 2008 an assessors programme and registered with the HWSETA as an assessor for first aid and community home based care. In 2011 the NPO sent her on a BAA course which she completed successfully. She was nominated by her Centre to participate in the 2009 TPET group which she completed successfully. She was subsequently trained as a moderator during 2012. In 2014 she participated in a nursing training programme through the South African Medical and Health Service (SAMHS) and upskilled to an Enrolled Nurse. She upgraded her registration with the SANC to a Nurse (Enrolled). During 2016 she enrolled on the Occupationally Directed Education and Training and Development Practitioner (ODETDP) NQF level 5 qualification which she completed successfully.

Trainer 3 (T3):

Is a black (African) Sepedi speaking female from Limpopo and currently residing in Soweto, Johannesburg. She is single and forty-five years old. She has been a first aid and home-based care instructor for seventeen years and completed the ICP in 2001. She completed an in-house monitoring/syndicate leaders course in 2004. She has been utilized at her Centre as a peer monitor of instructors which is part of the training quality management system. During 2009 she was nominated and enrolled for the assessor's course which she completed successfully. She registered with the HWSETA as an assessor for first aid. Her Centre nominated her to participate in the 2009 TPET group which she completed successfully. She continued her studies and completed the ODETDP NQF level 5 qualification in 2017.

Trainer 4 (T4):

Is a black (African) Tswana speaking female originally from Carletonville and now residing in Kathlehong, Gauteng. Before she was employed by the NPO she completed a six months computer course and BAA course at her own cost. She is thirty six years old and has a daughter of about 13 years. She is a single parent. She was originally employed as a clerk, data capturing. During the period 2009 until 2010 she was nominated to be trained as an instructor as her Centre was short of instructors. She worked as a first aid instructor for a short period of time before being re-deployed as a clerk data capturing. She was nominated by her Centre to participate in the 2010 TPET group which she unfortunately did not complete. Since the TPET she has not been able to continue with further studies.

Key findings from the semi structured interviews

To answer the research questions “what was the programme implementation process” and “how did the participants responded to the programme and their learning experiences”, qualitative data was generated from the semi structured interviews (body corpus) of four TPET participants. This data was analysed by using in vivo coding for the first cycle of coding. With the second cycle of coding, similar codes were analysed for their commonality and then grouped to form a pattern code. These pattern codes were used to develop themes and subthemes from which five main themes emerged. These themes and subthemes are presented in table 4.1

Table 6

Themes and sub-themes

Themes	Sub-themes
Theme 1: Programme implementation and selection of participants	1.1 Selection 1.2 Benefits 1.3 Negativity
Theme 2: Participants experiences of the programme content	2.1 Learning material 2.2 Assessments 2.3 Support 2.3 Language
Theme 3: Barriers to learning	3.1 Technology 3.2 Finances 3.3 Family responsibilities 3.4 Resources 3.5 Work responsibilities 3.6 Filling the support gap
Theme 4: Implementation of learning in the classroom	4.1 Application 4.2 Monitoring
Theme 5: Changes in how participants feel about themselves	5.1 Confidence 5.2 Disappointment

Theme 1: Programme implementation and selection of candidates

In the findings there are three sub-themes that influenced programme implementation and the selection of participants. This consisted of the selection process that was followed to nominate participants to enroll in the TPET, the perceived benefits and negativity that developed amongst the participants based on their experiences of the nomination and selection process.

Selection

The findings of the selection process indicate that there was almost no involvement of the participants in the decision-making process to enroll them in the TPET. They were nominated and instructed by their managers to complete the required admission documentation to enable the NPO to enroll them with the selected tertiary institution. This aspect is illustrated in the following responses from the interviewed participants:

T4: You know, so many things you have to learn as you go by, it was fill in the form you're going to do this training, so we were instructors, so we also need to do it.

T3: So, I was in Pretoria, how they choose, I do not know but it was part of the group from Pretoria, we ended up being here.

T2: We were told the learning materials are available for us and we are doing the course, we must just sign the papers.

The way the participants have been told, or rather instructed, could indicate a lack of a formal programme planning process within the NPO. Also, by not following a participative and collaborative management approach by the relevant Centre Managers, this rather autocratic

approach caused some resentment with the participants. Being selected with no reason for their nominations, some participants felt insecure and at risk. This situation may have contributed to speculation related to their work performance or possible perceived inadequacies as experienced instructors. As they were contract workers this situation contributed to some of them having some sense that they may lose their positions within the NPO. The nomination process was also perceived as a threatening situation and it is illustrated in the following responses of the participants:

T2: There was no explanation and for us as a group, it was sort of a threatening situation.

T1: At first, I thought why I am doing this programme, I also asked my Centre Manager why you put me on this nonsense.

T4: Centre manager said, we need to enroll, it was a quick thing, you were given a form, you need to enroll, no explanation.

Benefits

Related to the autocratic nomination and selection process and not been given a reason or an explanation why the TPET needed to be attended, the participants had to interpret the situation on their own. They believed the training was for the benefit of the NPO and as they were not permanent staff, should they refuse to register, they could also be at risk of losing their independent contract positions. This contributed to feelings of insecurity and being treated disrespectfully in terms of their positions within the NPO. Three of the participants, however, as they progressed with the TPET, started to realise that the training had some personal benefits after all. Also, one of the trainers acknowledged that the TPET also provided some opportunities

should they want to start their own businesses. One of the participants was even prepared to resign and study fulltime if there was support for her children to enable her to fully utilise the development opportunity. These findings are illustrated in the following responses received from the participants:

T2: So, we had to interpret the whole thing in our own way, we felt it was for the benefit of the organisation and because we were not permanently employed if we do not do it maybe we will be fired.

T2: As I continue to work with the course, then I pick up that it had benefits for me as an instructor.

T3: I thought just to use this opportunity.

T1: It also creates a great opportunity to start my own business and that is why I took it on.

T4: Given the opportunity, even if it means I have to quit my job, as long as there is something I will get for my kids to carry on while I am still studying.

Negativity

It seems that the autocratic selection process and the fact that the participants were not involved in the decision making created a lot of negativity which could have inhibited learning within the cohort. This contributed to some of the participants not coping with this aspect resulting in them not completing their assignments and consequently did not complete the programme. This is illustrated in the following responses:

T2: We were not involved when the decision was made that we had to do the course so there was a lot of negativity.

T4: Some of the people that were in the programme was full time instructors, so most of the time they were requested to be in class, also they were not so keen about this training to be honest.

T1: It became a kind of a stress situation, I had to give up something and I then neglected to finish it within the required time.

T2: They could not move away from the negativity and because of that they did not submit assignments.

According to Knowles et al. (2015) the education for adults must be aligned to their training needs. To achieve this, he proposed that the design and development of learning programs must be done by applying a set of core adult learning principles consisting of the adults' knowledge needs, their self-esteem, their previous learning experiences, their motivation to participate, their development as self-directed learners, their situation towards and their understanding of why they need to participate in learning activities. These principles function best when adapted to individual learners and their situational settings. These adult learning assumptions and its application overlaps with the interactive programme planning model developed by Caffarella and Daffron (2013) which will be discussed in more detail in theme 2.

From the above perspective of andragogy and the findings based on the responses of the trainers, the recommended adult learning principles were not followed in the nomination and selection process of the participants. The trainers experienced that the responsibility for their learning was

controlled by their employer, the facilitators of the TPET and the course material. This could have influenced their self-concept of dependency when it comes to this specific workplace learning. In their other adult roles, they may have found self-fulfillment as volunteer workers and parents and they could be self-directed in making choices and decisions in that regard. According to Knowles (1980) this kind of situation creates challenges for the education of adults. Although adults are self-directed in other aspects of their lives, but when it comes to education, their past learning experiences could also cause them to become dependent and passive and they will therefore wait to be taught. This becomes more challenging if adults are treated as dependent learners as was done with their enrollment process to participate in the TPET.

Another aspect that could complicate the matter according to Knowles (1980) is based on adults' previous experiences. Some adults could have the perception that they are not good at academic work. This aspect can also be a serious barrier to adults participating in adult education programmes and they need to be assisted in this regard, which was not done. These challenges have implications for practice consisting of the learning environment, identifying needs, planning, presenting and the evaluation of learning which will be discussed later as part of the other findings.

The learning environment for adults should be where they are most comfortable and at ease. The psychological environment should make them feel respected, accepted and supported which was not done as they indicated their fear of losing their positions should they decline to participate. Adults require a safe space where they can discuss matters without fear of repercussions which

was not provided. This concept of the environment according to Knowles (1980) can be taken beyond the classroom in terms of how it is reflected within an institution or organisation in terms of its policies, procedures, management and labour relations. It can therefore be concluded based on the trainers' responses that the Centre Management viewed the trainers as dependent rather than self-directed employees that can be instructed and be expected to follow instructions.

According to Knowles (1980) the adult's self-concept in terms of andragogy, of being self-directed clashes with the traditional pedagogical practice within most learning environments of being told what they need to learn. Adults will, however, participate in learning if those that want them to learn have the power to punish them should they not participate in the learning process as indicated by the trainers interviewed. In andragogy the facilitator needs to involve the adult learners in helping them do identify their specific learning needs. This can be done by developing a competency model involving the adult learner to assess themselves and identifying areas of improvement as required by the agreed competency model. This aspect will be discussed in theme 4 which includes the NPO's quality assurance monitoring process which can substitute as a competency model.

The adult learners need to be involved in the planning process for their learning event. It creates commitment and prevents apathy, resentment and possible withdrawal from participating in the learning event as some of the trainers indicated. A participative planning process will support learner's self-concept of being self-directed and the facilitator as a guide and a resource in the process. Changing the identified training needs into learning objectives and assessing progress

toward achieving the agreed objectives becomes the joint responsibility of the learners, facilitators and the employer. In this regard the NPO did not involve the participants in the planning process and assessment of their progress with the TPET was limited.

Theme 2: Participants experiences of the programme content

The participants experienced quite a range of challenges working with the learning material which ranged from contextualizing the learning material, the assessment of assignments and portfolios, support received from the tertiary institution and level of the language used in the learning material.

Learning material

Some of the trainers' responses indicated that they struggled with understanding what was expected off them. The learning material consisted of four theoretical modules and a compulsory workshop. No books are prescribed and there is a reader for each of the modules supported with a tutorial letter. The tutorial letter contains the guidelines, exercises, activities and the learners support systems for the programme. The following responses illustrate that there was uncertainty in terms of the instructions contained within the tutorial letter and relating the content and its application to their own experiences as instructors within the NPO:

T2: The way the material was designed, we could not understand what was expected of us and some of us failed.

T3: It was so complicated, it maybe the way, to my side, I did not understand how they want us to put it.

T4: I think the reason might be that maybe they did not understand the whole programme, it was complicated for them.

To address some of the challenges experienced with the learning material one of the trainers proposed a one-day pre-course session to enable the course facilitators to orientate them to the participants and the participants to the facilitators as illustrated in the following response:

T2: One day pre-course session so that every facilitator also gets a little bit of background about the course requirements.

One of the trainers indicated that the content did not match the environment in which it was going to be applied and it is illustrated by the following response:

T2: To avoid challenges of having to deal with issues because practical environment that does not suit the content.

Assessment

Two trainers commented on the challenges with the assessment of the learning. This may indicate that there was no assessment of the learning process itself to determine what learning support should be provided by the NPO to assist the learners with mastering the learning content, to complete their portfolios successfully and ensure transfer of learning to the workplace. This was illustrated by the following responses:

T2: The course was different, so we could not effectively collect the required evidence for our portfolios.

T3: You find that you know the answer but do not know how to put it, it was because of misunderstanding.

T2: Practical work for the portfolios was also a huge challenge because the NPO has a way of doing things such as layout of the class and instructional techniques and methods which were completely different to the requirements.

Some positive comments were made by some of the trainers regarding the learning material because of similar prior learning they were exposed to. This enabled them to recognise learning content and enabled them to make links with concepts that were covered previously in other training and development courses that they attended and completed successfully. This is illustrated in the following responses:

T2: As I went through the learning material I could relate because of the courses I did previously such as facilitation, assessor and the instructor certification programme.

T1: The theory part of it was some of the things that we did in the instructor certification programme and some of the things we do on a daily basis in terms of instructing.

Institutional Support

Looking at learning support from the tertiary institutions to participants in the programme, the consensus view was that the support was ineffective which was further complicated by their

diverse cultural backgrounds and marginalised circumstances. The course leader however accommodated them, and they were not penalised as illustrated in the following responses:

T2: We come from different backgrounds, so the lecturer could not relate to other issues we were having.

T1: I did not really use the learner support; my learner support would be at work.

T3: The course leader will let you know what you need to rectify, also he was not strict to penalize you for one thing, he was supporting us.

Language

The three trainers interviewed, English was not their first language. This seems to have created challenges in terms of speaking, understanding, writing and spelling in English. The following four responses show that the language presented further challenges for the participants. As English second language users the level used in the programme seemed to be beyond their level of understanding:

T2: Challenges of English and other things we did not have access to.

T3: I think the language also counted, they were using big terms, they spoke to us like when we use the big medical terms when giving training.

T3: Some you do not understand it, but when they explain it in normal English, then it was easier.

T4: There were challenges in terms of English, that is why I said I relied on my dictionary and the books that they issued.

From the perspective of curriculum design and development the above findings align well with Kelly (2009) conclusion that planning of educational programs is a more refined process than what most programme planners will admit to. Political intervention and representation has meant that most debates about educational curriculums has progressively become meaningless and silenced. In this regard central planning and control through assessment and checks have become part of a forced implementation process of the planned and received curriculum such as in the case of the ODETDP level 5 qualification. The TPET was developed based on four unit standards of the SAQA accredited ODETDP level 5 accredited qualification.

Kelly emphasized that an education curriculum should include at least the following measurements of planning and practice: the objectives of the developers, the process to be used for the implementation of the developer's objectives, the learner's experiences based on the educator's efforts to implement the developer's objectives and the unforeseen learning that has transpired as a by-product of the curriculum process. This process overlaps with the interactive model for programme planning as developed by Caffarella and Daffron (2013)

From the responses and the subsequent findings, it can also be concluded that there was no formal programme planning process as proposed by Caffarella and Daffron (2013) in their interactive model for programme planning. This interactive model makes provision for the context in which programme planning takes place; the development of support for the training programme; needs analysis to determine programme content and priorities; setting goals and supportive objectives; deciding on instructional methodology; transfer of learning; assessment of

learning; programme format, timetables and facilitators; training budgets; marketing of programmes and paying attention to detail in the previous processes.

The context for implementing the TPET is important because organisations such as the NPO are constantly adjusting to political and economic environments to remain financially sustainable and to meet compliance requirements. The planning and implementation of workplace programmes such as the TPET should therefore involve the learners, their supervisors, programme facilitators and relevant middle and senior managers to remain focused on the original purpose of implementing the programme and the outcomes to be achieved. This involvement with programme planning also builds a support base for the programme within an organisation and contributes to successful implementation. Consideration should be given to those with limited job security as the situation can be very stressful as they are at risk of their services being terminated should they not comply with their supervisors' instructions, as in this case, or fail to complete the programme successfully as indicated by some of the participants in the TPET.

The establishment of a steering or advisory committee could assist with programme planning and implementation and should also build organisational support. Although generic pre-developed programmes such as the TPET are available and suitable, the content or learning material, although relevant, may still not address the specific needs of the participants within an organisation. When a training programme is a legal requirement by a government department or an accreditation authority such as SAQA it may seem irrelevant to do a formal needs assessment to determine whether the organisation or its employees have a need for such a programme.

Programme participants and organisations such as the NPO where this study was conducted may however identify additional requirements or challenges in applying the course content within their specific organisational environment as indicated by some of the trainers responses regarding the monitoring process in the NPO.

Programme assessment such as the monitoring process of the NPO which is discussed in theme 4, help to determine whether a programme such as the TPET with its various components has achieved the planned programme goals and learning objectives. The assessment process is also about identifying, gathering and analyzing information for feedback and decision-making reasons. The results can therefore be used for accountability purposes and in taking remedial or corrective action as required by management to ensure compliance or regulatory requirements have been met. In interpreting the above findings, it seems that programme assessment was not done in the NPO. Assessment also involves all the other components of the Interactive Model of Programme Planning as developed by Caffarella and Daffron (2013). The compliance and capacity context here is very important because it can result in well-developed programmes failing, such as the TPET. Programme planning processes and its outcomes therefore needs to be constantly assessed and feedback on progress and challenges negotiated with the participants and training provider, which was not done in this case.

In view of the participants responses the learning material formats must be suitable for the context in which it is going to be used. There is, however, no one best format and in selecting the most suitable format, the following needs to be considered: the instructional techniques, the profile of the participants, the experience and availability of the facilitators, venues for training

and the equipment requirements, programme content, outcomes, and the context in which the training needs to take place. Based on the findings this was not done within the NPO. No formal attempt was made by the participants supervisors to change the monitoring process to make it compatible with the TPET learning material content.

From the above findings it can also be interpreted that language was a major challenge for three of the TPET participants interviewed. This aspect became clear within the interviews itself and the trainers' responses to questions that sometimes needed to be rephrased or explained. The language challenges relate to Landsberg et al. (2016) findings that language is multidimensional. It is used to communicate with other humans that know the language system. The characteristics of language are that it is complicated and controlled by rules, it is also a shared coding system and a social instrument. In terms of learning, a distinction is made between conversational and academic subject specific language or vocabulary which seemed to be a challenge for some of the participants in the TPET. In comparing spoken with written language, spoken language is "context embedded" and written language is "context dis-embedded".

According to Landsberg et al. (2016), when referring to literacy it entails more than just reading and writing. Literacy is critical in the "cognitive-cum language" development instead of just dealing with reading, writing and the spelling ability of the learner. It has a major impact on the objectives for learner support in writing a language for academic purposes as reflected in some of the participants responses.

According to Landsberg et al. (2016) language influences all learning. Only about 9% of South Africans use English at home. Irrespective of the Government's project to promote multilingualism, English and Afrikaans remain the main language choices in learning and teaching with most preference being given to English. Because of poverty in South Africa and the struggle to survive, language development in socioeconomic marginalised communities are limited and further compounded by low English literacy levels of parents and caregivers. This aspect could have influenced some of the participants language proficiency. It must however be noted that for all the participants interviewed, English at best was a second language.

In view of the above, it must be accepted that language is a major barrier to learning within the South African context. The other barriers to learning experienced by the participants in the TPET will be discussed in the following section.

Theme 3: Barriers to learning

Exploring the experiences of the participants of the TPET it revealed certain barriers to learning as well as the participants efforts to overcome the support gap left by the NPO's seemingly inability or unwillingness to formally support their learning efforts.

The barriers to learning identified by the participants consisted of technology, finances, family responsibilities, resources and work responsibilities.

Technology

Three of the four trainers experienced substantial challenges regarding access to computers, printers, internet and telephones. This could be because of their socioeconomic situations as they did not have access to these technologies at home. Their access to technology at work was also limited as illustrated by the following responses:

T2: Was challenging for us because we did not have access to computers, printers and the internet.

T3: Lack of technology on my side, there was no computer, most of the time we did hand writing.

T4: You know even when you get to work you do not have access to internet to be able to do my research.

T2: We also did not have access to a phone, while talking on the phone someone will tell you I am responsible for the call.

Finances

Three of the four trainers are African females and from previous disadvantaged communities. Being contract workers, they only received payment for work done at the NPO. Two of the female trainers are also single parents with financial commitments to support themselves, their children and extended family members such as elderly parents. This resulted in financial stresses as illustrated by the following responses:

T2: Sometimes we did not have money and sometimes we had to work long hours and did not have food so even for the people supporting us.

T3: We were still under contract and were just looking for money as well and the pressure was on us.

T4: Sometimes you will be requested to meet with other students, one day the participants or learners are to meet, at time I would not go, I did not have transport means.

Family responsibilities

Three of the trainers, being females and having families to care for, experienced substantial pressure within their home environments. They were required on some weekends to go to their centres to conduct training classes or to attend study group meetings. This created challenges and the study group meetings were eventually cancelled. This resulted in them working individually and withdrawing from some of their family activities such as going to church on Sundays. This is illustrated in the following responses:

T2: I had a lot of work to do over weekends, Saturday become a short day for me. Sundays as well, as I had to go to church. Children could not understand why I am not going to church like I use to do.

T1: I use to come home at 6 pm, bath the baby and help my wife as she was also studying.

T4: Yes, I had to help my daughter with her homework, considering the fact that when you get home 8pm or 9pm, so, it was really not easy then for me.

T2: Because we have families and responsibilities over weekends, so I think we only met twice then it could not work, then we started working individually.

Resources

Two of the four trainers experienced challenges within their home environments and the availability of resources to enable them to complete their work assignment. They felt that they were directed to do the TPET and complete it in their own time. They questioned the fact that they were not being given time during working hours to work on their studies and be provided with the required resources to do so by the NPO. This is illustrated by the following responses:

T2: The time was very little for me and the resources was also not available for me, you must have a desk and I did not really have resources at home to be comfortable at night to study.

T4: I was renting there, it was a big house that was divided by cardboard, so, you know, you did not have your own privacy or space, for me to study.

T2: Why are we doing the course and we had to do it in our own time, can we not do it in working hours and why are we not being given any resources.

Work responsibilities

It seems that for some of the trainers their work responsibilities increased after being enrolled on the TPET. For one of the trainers his home responsibilities also increased as his wife had a baby and also started to study. This is illustrated in the following responses:

T1: We took on too many classes at that time, it became too much as my wife also started studying so it kicked me out and we had a baby at the same time, so it messed up my study time.

T3: There was a lot of training and also onsite training, we ended up giving training on some Saturdays.

T4: It will be better if you remain in the office this whole time because there is no one as you can see. You are the only one left, so that is how I ended up not being in the classroom, but in the office.

Organisational support

There was a noticeable lack of support for the trainers from their managers and peers while participating in the TPET. When requesting time at work for studying it seems that the participants did not get the required support to enable them to be successful as they did not complete the programme successfully This is illustrated in the following responses:

T3: I don't think I am going to make it because I do not have support from my colleagues and from my managers.

T1: It became a point at work, I went to the Centre Manager and asked if there is any time to give us to study. I think he was also not very clear on how to give us leeway to achieve.

T2: Most of the challenges we had come from the Centre.

Filling the support gap

Some of the participants overcame the support gap left by the NPO by sacrificing their personal and family responsibilities to make time for their studies. This is illustrated by the following responses:

T3: Most of the time I cut my personal stuff, so I could complete the portfolio and everything in time, so, this thing of going home to funerals and weddings, I cut it off.

T2: It was difficult specially weekends. I had to sleep late during the week as well, wait for them to go sleep, as they are awake they will disturb me, which was a big problem.

Study group

The establishment of a study group between the 2009/2010/2011 were different. The 2009 cohort established a study group and had positive results. This is illustrated in the following responses:

T2: We had a study group as suggested but it had to stop as we had to work in our own time and not working hours because we were not permanently employed.

T3: After we end up creating a study group, is when things started being easier for us.

T4: To be in a group, a study group with others so you can understand what it is about.

The above responses and findings can be interpreted as barriers to learning. Cross (1981) and Fagan (1991) each developed a classification of barriers to learning. Cross classified learning barriers as situational, institutional and dispositional. This is similar to Fagan's (1991) classification consisting of life factors (situational), structural factors (institutional) and learner inherent factors (dispositional). All of these barriers were more or less experienced by the participants in the TPET.

Life factors consist of external influences on the learner that is outside of their control. These influences are usually family and work-related responsibilities because of the various roles and positions that learners also fulfill within their households, families and communities. These factors compete with the amount of time and finances a learner is prepared to invest in learning activities. Family support is also significant especially if the learner must travel to attend classes.

As indicated by the participants responses all these factors were experienced by them but also managed differently during their participation in the TPET. As a result, the two successful participants could contribute some of their success to completing the TPET to their ability to manage these life factors.

Structural factors originate from how the learning institutions have designed and presented the training programmes learning activities. Barriers relate to entry requirements and registration processes, timetables and sequencing of learning activities and the support services provided such as access to libraries, computers, student support, counselling and transport. As indicated by the TPET participant's responses, they experienced various challenges in this regard of which understanding course instructions, lack of access to technology and employer learner support were substantial challenges.

Learner inherent factors relate to a learners' perceived ability to overcome hurdles in enrolling, attending and completing learning activities successfully in the required timeframe. These dispositional barriers relate to the learner's self-esteem attitude toward the value of learning and the benefits of it, negative learning experiences of the past and the perceptions learners have toward the learning institution and its staff. As indicated by the two successful participant's responses, they were able to overcome their personal loves and structural factors in completing the TPET successfully against all odds. It seems that this achievement motivated them both to proceed to complete the ODETDP level 5 qualification successfully and in the required time frame.

Rubenson and Desjardins (2009) propose what they call a bounded agency model where the state, through policy measures, can have a direct impact on structural or institutional barriers and influence learner's decisions in terms of learning options available to them. They refer specifically to neoliberalism and the institutional barriers it can create in relation to the need of organisations to train their staff. In overcoming these barriers adult learner's perception of dispositional barriers (life inherent factors) can be affected negatively. The NPO stopped using the TPET as a bridging programme during 2012 and since then there has been no other learning options available to the trainers except the ODETDP level 5 qualification.

Landsberg et al. (2016) gives a South African perspective to barriers to learning which uses a Bioecological framework to create an understanding of the interaction between an individual and the various other systems that the individual is linked with. This can be done by using ecological systems theory for which they propose the Bronfenbrenner framework. This framework is a multidimensional and contextual model of human development. This model proposes different levels of interconnected systems that cause change and development. What happens in one system influences the other causing complicated relationships and influences inclusive education. Development challenges can therefore not be excluded from the challenges of social issues that contribute to barriers of learning in a developing country such as South Africa. The Bronfenbrenner framework (as cited by Landsberg et al., 2016) consists of four dimensions consisting of proximal processes, person characteristics, systems/context and time. It is acknowledged that these dimensions overlap with the classification system of barriers to learning, adult learning principles and the interactive model for programme planning. It is, however, not pursued within this study.

Landsberg et al. (2016) identified several barriers to learning within the South African context which includes socio-economic and educational barriers. The socio-economic issues that contribute to severe barriers to learning and determine the world in which learners live consist of the following, a culture of poverty and low levels of development, resulting in marginalisation, moral collapse, poorly or unplanned urbanisation, lack of work opportunities resulting in unemployment with little hope for the future; decay in family life and disintegration of families; the weakening in morals and ethics; an increase in violence and child abuse; the impact of an HIV/AIDS pandemic; cultural diversity and different languages. As indicated by the responses of the TPET participants it can be concluded that these socioeconomic barriers are part of the context of their social lives in which they live and work. It is therefore reasonable to expect that the NPO in terms of its purpose, funding model and educational community projects to have been more supportive of participants in the TPET.

In educational barriers the focus of assessment has changed from assessing the learner through the assessment of the learning to the assessment for learning. This approach focusses on learning as a process, rather than on the outcomes of the learning. This approach is to assist in identifying learners that have challenges with the learning process. The goal of assessment when learners seem to have some challenges it is to get information to understand their needs for support and the development of support strategies. According to Landsberg et al. (2016) the following assessment framework can be used: develop an understanding of the actual situation and the learner's interaction within this context; identify learner's self-assessment activities and response to assessment results; identify the learner's strengths; identify areas for support and resource

needs; facilitate support and enable the learner; facilitate the learner's access to the provided support and resources; address life skills challenges of learners which includes reading, writing and computer skills. As indicated by the participants responses no attempt was made by the NPO to determine the challenges experienced by the trainers and provide the required support which is standard practice in the NPO funded community education project through a monitoring and evaluation process.

Theme 4: Implementation of learning in the classroom

The trainers experienced some challenges in implementing their learning in the classroom. The NPO's instructor guides contains a standardized lesson plan for each of the modules to be presented and it follows a specific instructional methodology which is quality assured through a monitoring process. Because of classroom sizes the class layouts options are limited which influence facilitation and group interaction.

Application

From the responses it seems that there was no formal system or an attempt from the NPO to assist in facilitating transfer of learning to the classroom and revising its own training system which included orientation and involvement of the trainers participating in the TPET to review the NPO's instructor development programme and reviewing the training material. This is illustrated in the following responses:

T2: When we do classes, we have to follow the NPO instructor guides which was very different from what we were learning.

T2: Was challenging because we could not really experience implementing of what we were learning.

T2: After completing the course, we went back to the old way of doing things, so it did not continue.

Monitoring

The purpose of the monitoring system is to ensure quality of training in the classroom and to monitor the trainers following the instructor guide in terms of the lesson plans and adhere to the latest protocols applicable to the technical training content. The monitoring of the two trainers participating in the TPET highlighted their challenges within the classroom and the NPO's training system presenting transfer of learning which raises issues of compliance and management of the training system. This is illustrated in the following responses:

T2: Monitoring procedure was totally against what we were learning and that was a great challenge for all of us in terms of completing our portfolios for the studies.

T3: I prepared differently for monitoring.

T2: I talked to my mentor, who intervened, the monitor was removed, and my mentor took over, I was monitored successfully.

According to Merriam and Leahy (2005) from a perspective of transfer of learning, a considerable amount of money is spent annually on training and development in the workplace with very little return on increased performance within the workplace. They reviewed various literature on workplace and cited Baldwin and Ford (as cited by Merriam & Leahy, 2005), who have identified three variables that influence workplace learning consisting of programme

planning, work environment and the characteristics of the learners. Based on these variables they make recommendations of involving the learners in programme planning and the development of supporting structures to facilitate learning within the work environment. In terms of programme planning for workplace training and development the Caffarella and Daffron (2013) interactive model for training and development was introduced in theme 2. The selection of the candidates participating in the TPET, their experiences of the learning material and the barriers they experienced to learning as discussed in theme 3, already introduced challenges to the transfer of learning to the workplace as indicated by the participants responses and the subsequent findings. As indicated by the participants responses it can be concluded that the NPO's training procedures for monitoring created a substantial barrier to transfer of learning to the classroom.

When facilitating programmes for adults, facilitators need to ask whether the learning objectives were achieved and if the participants will be able to transfer their learning to their work or personal environments. Transfer of learning is therefore part of the planning process and linked to the programme context, its goals, instructional objectives and programme evaluation process as already discussed. Transfer of learning is a complex process. It is influenced by the programme planning process, workgroup participants learner profile and their motivation, the chosen design and delivery methods used based on adult learning principles, the nature of the learning content, planning for immediate content application by participants and their workplace situation and how to eliminate barriers to transfer of learning. In this regard, it is important to be aware of how much control the programme planners have over organisational and social influences. The less control program planners have, the more challenging will the transfer of learning process be as experienced with the TPET. Although some of the participants discussed

their challenges with their supervisors, the training and monitoring process was not reviewed to facilitate transfer of learning.

Transfer strategies therefore needs to be considered before, during and after the programme. It is important to identify key people in the process such as supervisors and mentors for candidates as discussed previously. Follow-up strategies and techniques for individuals and groups need to be developed in the planning phase and agreed before the start of the programme. In workplace programmes, senior managers also need to be involved as it is critical to ensure successful transfer of learning. As indicated by the responses of the participants this process was not followed in the NPO. Although it is not part of this study, this aspect raises issues regarding barriers to change within the NPO and its governance structures.

Theme 5: Changes in how participants feel about themselves

In exploring how the trainers felt about themselves based on the results of their participation in the TPET, those that were successful displayed a sense of achievement and pride in their results and the confidence it developed within them to continue with further development. The non-successful candidates were disappointed and both indicated that they wanted to continue their further development.

Confidence

Both the trainers that were successful are middle aged African females with family responsibilities. Although their participation in the TPET was challenging for them they persevered and continued to complete the ODETDP 5 qualification as initially planned by the

NPO. They developed more confidence and took the initiative to complete their studies successfully. Reflecting on their participation in the TPET they experienced it as positive which is illustrated by the following responses:

T2: So, yes, in terms of confidence, in the class, interpreting the content, understanding the NPO way of instructing and picking up errors.

T2: I enjoyed the TPET programme and I continues with ODETDP 5, it made me realize that this is what I want and enjoy.

T3: It built me a lot, I have seen, I have improved for even now.

T2: Some of the things I learnt was to allocate time and manage my time for studies, housework and taking care of my children and share time with my family.

T3: But at the end of the day we end up knowing that you have made a miracle, because all these people that did not trust me, but you made it.

Disappointment

The two trainers that were not successful reflected on their experiences differently. Both had challenging circumstances at the time of their studies which they managed differently in comparison with the successful trainers. It seems their different situations determined their time allocated in balancing their work and family responsibilities. One of the trainers (male trainer) however proceeded to complete two other full qualifications at higher NQF levels successfully and was eventually promoted into a management position within the NPO.

The female trainer experienced disappointment in herself and was not able to overcome challenges in continuing with further studies to improve her position within the NPO as illustrated in the following responses:

T4: No one want to do something and then expect to fail, so yes, I was not happy at all, I do not like to fail.

T4: I did not feel good about myself been given an opportunity to study whether you want to or not.

T4: Given the opportunity to up yourself but you did not do it is eating me inside.

The unsuccessful male trainer was not sure about the influence of the training programme on how he sees himself as an individual. He however indicated that he needs more direct support to assist him to complete studies successfully. This is indicated in the following responses:

T1: Maybe it changed me, I do not see it, but maybe it did. As I said it did to a certain extent change me, you will always go back.

T1: I just need somebody to constantly be there, come on now, to push, how are you.

According to Knowles (1980) when people start to see themselves as adults their self-concept changes from dependent to self-directed individuals. Also, the learning environment for adults should be where they are comfortable and at ease. Both these aspects were discussed in theme 1. According to Baumgartner et al. (2003) the goals of self-directed learning are reliant on the theoretical perspective from which it is defined. Caffarella (as cited by Merriam & Bierema,

2014) proposed four goals for self-directed learning which Baumgartner combined into three definitions. These definitions explain self-directed learning as a goal, a process and as a personal attribute. In terms of being a goal it explores developing the ability of the learner to be self-directed in their learning activities, to nurture transformative learning and to advance emancipatory learning and social activities. As a process it consists of learners taking ownership for planning, conducting and assessing their own learning. As a personal attribute it relates to the learners' willpower to continue learning while fulfilling goals, curiosity and deriving satisfaction from it. This aspect was demonstrated by the two successful trainers in the TPET

In terms of self-directed learning as a process, Knowles (as cited by Merriam & Bierema, 2014) developed a process that may be used to develop a learning contract for learners and facilitators to manage self-directed learning consisting of developing a relationship of combined respect and support, deciding on learning needs, developing learning objectives, identifying required resources, deciding on suitable learning activities and assessment of learning achievements which was not done with the TPET in the NPO. Spear and Mocker (as cited by Merriam & Bierema, 2014) challenged the process as identified by Knowles which they termed "organizing circumstances". According to them self-directed learners rather choose from the available options in their environment to develop their learning activities which was demonstrated by the successful and not successful trainers in their responses within this research project. Learning therefore move between different activities that in the end forms a logical whole for the learner. With reference to the definitions of self-directed learning as a goal, process and personal attribute Baumgartner et al. (2003) refers to three self-directed learning models which consists of

Tough's sequential model, Brockett and Hiemstra's interwoven model and Grow's instructional model.

Costa and Kallick (as cited by Merriam & Bierema, 2014), developed criteria consisting of self-management, self-monitoring and self-modifying for facilitators and learners to do a self-assessment of self-directed learning which drives the process. Baumgartner et al. (2003) refers to scales of readiness for self-directed learning as developed by Guglielmino and Oddi that measures personality characteristics, ability and attitude that forms the basis of self-directed learning according to them. According to Merriam & Bierema (2014) self-directed learning is used in organisations as a process to enable competitiveness and to adapt to change. Oh & Park (as cited by Merriam & Bierema, 2014) therefore highlight the importance of organisations to promote self-directed learning amongst their workers which should be explored within the NPO in their future developmental training projects to ensure compliance and financial sustainability.

Brockett and Heimstra (as cited by Tusting & Barton, 2003) cautions that there is a difference between instructional methods that are self-directed and self-directedness as a personality attribute. There is, according to them, a positive relationship between self-directed learning and learner self-esteem as well as self-direction and contentment with personal life situations. According to them, self-direction includes critical self-reflection which could have influenced the two successful trainers in the management of their priorities and time management. Candy (as cited by Tusting & Barton, 2003) refers to learning as a manner of searching for meaning in life. As a result, the importance of learning to the learner is more significant than how much has been learned. He recommends that the impact of power, social and cultural challenges needs to be

considered in how it limits learners' freedom and choices which become evident in this research project. In this regard Baumgartner et al. (2003) refers to criticism towards self-directed learning as it reflects individuality and independence which are associated with western white standards. Other sociocultural contexts need to be considered where the social values require the group to be more important than the individual as decisions made by the participants in this research project illustrated. This aspect could influence the development of individual learner contracts as they could be developed in a group context and therefore contain standardized objectives which should be considered in future by the NPO.

CHAPTER V. Conclusions, limitations and recommendations

Introduction

In concluding this research project, the last chapter presents a summary of the research project. It gives an overview of the research problem and its context, the reason for the study, a discussion of key findings, limitations of the study, conclusions based on the results of the study and recommendations for future research.

This study was conducted within the context of changes brought by the South African National Qualifications Framework. The South African Qualifications Authority Act (1995) made provision for the establishment of a National Qualifications Framework with the required supporting structures such as the South African Qualifications Authority and the Sector Education Training Authorities. In its attempt to comply with the changing education and training compliance environment an international health training Non-Profit Organisation implemented a Training Programme for Educators and Trainers (TPET). This programme was implemented during the period 2009 – 2011 as a bridging programme for an anticipated full qualification for educators and trainers such as the then Occupationally Directed Education and Trainers Development Programme level 5 or similar qualification, still to be developed.

This TPET skills programme, how and why it was conceptualized by the NPO, and how the participants experienced it, was the focus of this study. Across the three 2009 – 2011 cohorts only nine of the thirty-two participating instructors completed the skills programme successfully

and two of these instructors proceeded to complete the EDETDP level 5 qualification successfully.

This study explored the programme implementation process, reviewed the implemented TPET curriculum and explored the candidate's experiences of learning and the barriers they faced in the process. This study used a historical case study approach as described by Rule and John (2011). The research was conducted from an interpretivist paradigm using the lenses of adult learning principles, curriculum design and instruction and barriers to learning. The study employed an inductive design framed by the theories of adult learning, curriculum design and instruction and barriers to learning to enable a better understanding within an existing body of knowledge.

The case and unit of analysis was the TPET and the focus was the participants experiences of the programme. It is intended that this research project will contribute to learning at work and the discussions regarding challenges in implementing an outcome based NQF vocational training and development programme based on a SAQA approved curriculum and the compliance tensions that it creates within the organisation. A second aspect is the ability of the participants in overcoming barriers to learning within this context.

Discussion

Purposive sampling was used to collect data for this case study. Data was collected from documents related to the NPO's accreditation and legal compliance requirements as a training service provider. Semi-structured interviews were conducted with four of the participants in the

TPET. The four interviewees consisted of two successful and two not yet successful participants. The data collected from the documents and the semi-structured interviews was used to answer the following research questions:

- Why was the training programme for Educators and Trainers implemented in this Non-Profit Organisation?
- What was the programme implementation process?
- How did participants respond to the programme and what were their learning experiences?

Documents reviewed

In answering the question, why was the training programme for Educators and Trainers implemented in this Non-Profit Organisation, documents related to its accreditation as training service providers was reviewed. This included external documents from the Department of Labour and the South African Qualifications Authority. To ensure compliance and its sustainability internal documents and an inhouse instructor training programme was developed by the NPO. These documents were also reviewed and consisted of the NPO's instructor certification programme and a quality assurance monitoring process to enable and maintaining certification by instructors. The NPO's in house instructor's certification programme curriculum was also compared with that of the TPET and the ODETDP level 5 qualification. The TPET was the unit of analysis for this study and it is also a skills programme for the ODETDP level 5 qualification.

The NPO is accredited with various institutions as a training service provider. For its DoL accreditation it must comply with the minimum requirements and standards for the presentation of first aid and emergency care courses. The DoL also sets the minimum compulsory content of the course in instructional techniques for emergency care training providers. The NPO used this content and developed its own inhouse programme to meet its own specific training methodology and simultaneously maintain its compliance as a training service provider. It was anticipated that the then ODETDP level 5 or a similar SAQA developed qualification would become the future requirement for vocational instructors. To develop capacity a decision was made to start bridging training by using the TPET to prepare instructor for the ODETDP level 5 or similar qualification. It was also intended to develop capacity within the NPO to eventually present the TPET as an accredited inhouse skills programme. It is important to note within this context that during 2012 the vocational trainer qualifications at NQF level 4 which overlapped with the then ODETDP level 4 qualification was published in the Government Gazette for input and comments.

Semi – structured interviews

In answering the two remaining research questions of what was the programme implementation process, how did participants respond to the programme and what were their learning experiences, semi – structured interviews were held with four participants of the TPET. This purposive sample of four participants consisted of individuals of historically disadvantaged communities of which one was a male and three African females.

The qualitative data collected from the interviews were coded and from the pattern codes five main themes emerged consisting of programme implementation and selection of participants; participants experience of the programme content; barriers to learning; implementation of learning in the classroom; changes in how participants feel about themselves. Based on the thematic analysis findings were developed supported by relevant quotations from the participants. This was then theorized by applying the theoretical frame work.

Programme implementation and selection of participants

It was evident from the findings that there was almost no involvement from the participants in the nomination and selection process for the TPET. The way the participants were told or instructed could indicate that there was a lack of a formal planning process within the NPO. Most of the participants believed that the training needed to be completed because it was for the benefit of the organisation. Those participants that were not permanently employed and worked as independent contractors also felt threatened that they could lose their positions. As they progressed some participants realized that there could also be personal benefits for them as individuals. The nomination and selection of the participants however created negativity amongst the participants and it seems that this negativity could have influenced some of the participants in not completing their assignments and eventually dropping out of the programme.

Participants experiences of the programme content

It can be concluded from the participants responses that they did not have a clear understanding what was expected from them. There was uncertainty in terms of the instructions contained within the tutorial letter supporting the training programme. Comments were made on challenges

with the assessment of learning process and the learning support provided by the NPO to assist learners in mastering the programme content. Some positive comments were made by participants regarding the programme content because of being exposed to similar learning content in prior training programmes which they attended. There was however consensus amongst the participants interviewed that the institutional support was not satisfactory and that their diverse and marginalised circumstances required different support. For most participants in this programme, English was at best a second language and the group experienced challenges in terms of understanding, speaking and writing English. This aspect appeared to have contributed substantially to their challenges in understanding the programme instructions and content.

Barriers to learning

Specific barriers to learning identified by the participants consisted of technology, personal finances, family responsibilities, lack of resources and work responsibilities. There was challenges regarding access to computers, printers, the internet and telephones. Because of socio-economic circumstances some of the participants did not have access to these technologies at home. Based on participants responses their access to these technologies at work was also limited.

Being contract workers three of the participants interviewed only received payment for work once completed. For the female participants this situation combined with personal expenditure for their studies created additional financial stresses as they also had to support their families and some, their extended family members. These challenges in the home environment created challenges in terms of time and space in completing assignments. They questioned the fact that

the NPO did not give them time, work space and the required resources to complete their assignments at work. For some of the participants their work responsibilities increased after being enrolled on the TPET. There was therefore a noticeable lack of support for the participants from their managers and peers. Some of the participants managed to overcome the support gap left by the NPO by sacrificing their personal and family responsibilities to make time for their studies. Between the three 2009 - 2011 cohorts only the 2009 cohort managed to establish a study group resulting in the 2009 cohort being the most successful.

Implementation of learning in the classroom

The participants experienced some challenges in implementing their learning in the classroom. From the findings it can be concluded that there was no formal system or an attempt by the NPO to facilitate transfer of learning to the classroom. The participants perceived the content of the TPET not to be compatible with the NPO's training methodology. This was experienced when two of the participants from the 2009 cohort had to be monitoring which is a quality assurance process for their re-certification as instructors. Although the challenges were reported and resulted in the intervention of a line manager the training system of the NPO was not reviewed to enable alignment and transfer of learning. This aspect combined with the challenges related to the understanding of the learning content raises also concerns regarding the participants actual understanding of the programme content and the poor results achieved by participants in this study.

Changes in how participants feel about themselves

The successful participants in the TPET showed a sense of achievement and pride in overcoming their home and work challenges when participating in the TPET. They made personal sacrifices and persevered. It seemed that they have developed the confidence to continue with the ODETDP level 5 qualification and completed it successfully in the prescribed time being more self-directed learners.

The two participants that were not successful reflected on their experiences differently. They managed their challenges and time allocations differently in relation to the successful participants. In terms of their time management they spent more time on their home and work responsibilities. The male eventually proceeded to successfully complete two other full qualifications at higher NQF levels than the TPET. He was also promoted into a management position with supervisory responsibilities.

The African female expressed disappointment in herself for not being able to utilise the opportunity. Her work conditions also changed, and she has been unable to continue with further studies and to improve her position at work. Her home and work responsibilities may highlight the impact of socio-economic challenges and the importance of the employer support regarding the challenges in overcoming barriers to learning and involving the learner in the programme planning process.

Limitations

The following limitations of this study should be considered in terms of its findings, recommendations and conclusions:

- The conceptual framework although integrated is complex and could not be applied in its totality. The most applicable components of the framework were used to theorize the findings. It was also experienced that there was overlaps which caused possible duplication. It can also be argued that a simpler conceptual framework consisting only of the integrated planning model of Caffarella and Daffron (2013) may have provided similar results.
- Although not initially anticipated, access to trainers participating in the TPET became challenging. This was because of their work programmes and the traveling that was required. Distance between the training centres and changing reporting structure because of staff changes. Other aspects to this although not part of this research project that could have influenced access to the participants are organisational culture, governance structures, power issues between line and staff functions within the NPO and the tensions between a short-term focus of financial results versus long terms sustainability that require staff development to ensure growth and compliance. This raises the issue of commercialization (return on financial investment) vs development (return on social impact) which relates to the purpose of the NPO.
- All the participants including the researcher are at best English second language speakers. It became evident during the interviews that language may have been a barrier in the clarity of questions asked and the responses. Several questions had to be explained and rephrased. The language ability of both the researcher and the participant could have

influenced understanding. As indicated in the findings, most participants had challenges with the language requirements of the programme.

- Being a case study there is therefore limitations in generalizing its findings. It must be noted in this regard that the purpose of a case study according to Rule and John (2011) is not to make claims of its findings beyond the case. The purpose of the case study is to study an individual case to develop an in depth understanding of its situation. The results of this study according to Guba (as cited by Rule & John, 2011) should be about transferability as opposed to generalizability. Transferability however should rest with the reader in so far this study compares with other cases that the reader is aware off. In this regard Yin (as cited by Rule & John, 2011) compares statistical generalization with analytical generalization.
- The hierarchical position of the researcher within the NPO and the power relations it creates has been acknowledged within the design and methodology section. The issues raised by Hollard and Ramazanoglu (as cited by Seale, 2004) related to age gender, race, culture and religion and the influence of it on the interaction and understanding between the researcher and the interviewees was experienced within this research project. In this regard the aspect of insider – outsider in qualitative studies needs to be acknowledged. The researcher viewed himself as an insider as he was part and a member of the training system and shared roles, experiences with the participants which was part of this study. Although being part of the organisational culture it seems that there are among the trainers a sub-culture to which the researcher is an outsider.

Recommendations for future research

According to John and Rule (2011) a case study may identify other areas for future research.

They proposed the following kinds of research, that when applied to this case study could be considered by other researchers:

- Replication of study: this case study of a training programme for educators and trainers within a non-profit organisation: participant and organisational experiences can be repeated using the same research questions and design and methodology but in a different context. This can be done to determine whether the conclusions reached with this study is valid for other similar case studies which if replicated can contribute to what Gerring (as cited by John & Rule, 2011) refer to as a cross case confirmatory analysis.
- Extension of study: Based on the findings of this study there seems to be barriers to change within the NPO. These barriers may relate to organisational culture, organisational structure, capacity, power relationships between line and staff functions and governance issues. These barriers could be explored to create an understanding why the participants were instructed to participate in the TPET but was not supported to ensure transfer of learning to the workplace.
- Shifting the case to action: In developing remedial action to address the various issues of programme planning and barriers to learning as raised in the finding, an action research project could be developed.
- Synoptic review: this case study may also be used as part of a cross case analysis with other similar cases and different contexts.

Conclusions

Overall, the initial plan of the organisation to build capacity by utilizing the TPET as a basis for the ODETDP 5 qualification had merit as two of the participants of this research project completed the TPET successfully and continued to complete the ODETDP 5 successfully. However, based on the evidence of this study the organisation lack the capacity to make the articulation work. The two successful participants were able to find external support that enabled them to complete the TPET successfully. It seems that financial sustainability and compliance issues within the NPO Centres focus more on external drivers rather than building internal capacity to drive organisational development, growth and sustainability.

It seemed that there was a general lack of understanding among managers, supervisors and trainers regarding the compliance requirements for the NPO as an accredited training organisation. To ensure future organisational compliance more support for the participants of the TPET was required. Although requested by the participants no substantial support was provided. It also seemed that the majority of the participants own employability linked to changing accreditation requirements was not linked to their personal development and the opportunities as provided by the TPET.

The organisational support required for employed historical disadvantaged individuals and not responding to their requests for support could be contradicting the purpose of the NPO. The NPO depend on fundraising for training related developmental projects within historically marginalised communities. Within these projects funding is requested for learner's support consisting of mentors, a stipend, travel expenses, food and refreshments. This is done to ensure

that participants complete the project's training programmes successfully to enable positive project reporting. It is therefore questionable that during the in house TPET development project the organisation deviated from their developmental model used to obtain external funding.

The above remarks however raise the issue of the challenges experienced by organisations such as the NPO where this study was conducted in implementing accredited training programs. From a financial sustainability perspective most NPO's operations are focused on service delivery to generate income, some form of advocacy activities aligned with their purpose and some form of monitoring and evaluation related to their operations for continual improvement. The need for funding may however sometimes creates conflict when the NPO engages in service delivery activities for funding that are in conflict with their intended purpose.

The continued changes in the education and training landscape creates substantial challenges for NPO's within the above context. This further relates to NPO's obtaining or allocating funding for the development of organisational capacity while simultaneously maintaining operational requirements as current staff members are upskilled or retrenched, new staff is recruited and learning managements systems are upgraded for compliance purposes. These activities have substantial administrative and financial implications in respect of increased overhead costs

The criteria for recruitment, selection and appointment of staff may also contribute to the capacity and compliance challenges within NPO's. This may be because the volunteer governance structures are directly involved in the selection and placement process. It appears

that International NPOs such as the NPO where this study was conducted do not consider the practical alignment of its organisational culture to the prevailing South African circumstances.

To discuss decolonisation of the curriculum, according to Sayed, Motala and Hoffman (2017) the training and development of the educators who present the revised curricula must be included as well as the process that is involved in it. Sayed et al. (2017) refers to educator's development as the link between the various educational institutions within the context institutions and government policy frameworks. This aspect may be relevant to this research project within the context of trainer development by the NPO to meet accreditation requirements and utilizing the trained instructors within training programmes which form part of community development projects. Based on personal experiences of the researcher, indigenous culture, language and traditions must be respected within training development projects. There is however potential for conflict within health-related projects. The prescribed curriculum based on a needs assessment and medical empirical knowledge could be in tension with traditional cultures or indigenous knowledge. As an example, the indigenous key family practices related to infant and maternal mortality is seen by health NPOs as a major contributor to high infant and maternal mortality rates in developing countries. An international NPO experienced that their course facilitators when conducting health training deviated from the prescribed curriculum in which they were trained, assessed and certified and reverted to indigenous knowledge and cultural practices in their care seeking behaviours and consultation of traditional healers and traditional birth attendants.

The training and development curricula of trainers within the NPO sector needs to be extended beyond the accredited curriculum. This must include the cultural context in which learning needs to be conducted based on a situational analysis. A supportive outcome tracking, monitoring and evaluation process should be considered for which the integrated programme planning process of Caffarella and Daffron (2013) could be used as a guideline.

Because of these tensions, projects that seek to harmonise modern medical knowledge with indigenous health knowledge and practices should be identified. NPO's should be tapping into such project insights to ease the tensions they experience in the communities.

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APPENDICES

Appendix A: Ethical Clearances



11 November 2016

Mr Willem Van der Westhuizen Louw 215081611
School of Education
Pietermaritzburg Campus

Dear Mr Louw

Protocol reference number: HSS/1752/016M

Project Title: A case study of a training programme for educators and trainers within a non-profit organisation: Participants and organisational experiences

Full Approval – Expedited Application

In response to your application received 19 October 2016, the Humanities & Social Sciences Research Ethics Committee has considered the abovementioned application and the protocol has been granted **FULL APPROVAL**.

Any alteration/s to the approved research protocol i.e. Questionnaire/interview Schedule, Informed Consent Form, Title of the Project, Location of the Study, Research Approach and Methods must be reviewed and approved through the amendment /modification prior to its implementation. In case you have further queries, please quote the above reference number.

PLEASE NOTE: Research data should be securely stored in the discipline/department for a period of 5 years.

The ethical clearance certificate is only valid for a period of 3 years from the date of issue. Thereafter Recertification must be applied for on an annual basis.

I take this opportunity of wishing you everything of the best with your study.

Yours faithfully



Dr Shenuka Singh (Chair)
Humanities & Social Sciences Research Ethics Committee

/pm

Cc Supervisor: Dr Vaughn John
Cc Academic Leader Research: Dr SB Khoza
Cc School Administrator: Ms Tyzer Khumalo

Humanities & Social Sciences Research Ethics Committee

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Permission to conduct research at NGO



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24 June 2016

University of Natal
School of Education
Pietermaritzburg Campus

Attention: Dr Vaughn John


LETTER OF AUTHORISATION TO CONDUCT RESEARCH WILLEM VAN DER WESTHUIZEN LOUW

As CEO, I have given permission to Mr W van der W Louw (student number 215081611) to conduct his research title:

“A case study of distance education within a non-profit organisation:
organisational and participant experiences”

The Organisation will be referred to as NGO XYZ and all information to be gathered should be done in a confidential and appropriate manner.

Regards


Craig Troeberg
Chief Executive Officer

Letter of Intent – Willie Louw
2016 - Staff Development

The Order of St John

19 Woolston Road, Westcliff 2193, South Africa
PO Box 7137, Johannesburg 2000, South Africa
Tel 00 27 (0) 11 646 5520 Fax 00 27 (0) 11 646 5845
Web www.stjohn.org.za NPO 000-814 PBO 18/11/13/1718

Appendix B: Research Instrument and Participant Consent Form

Data collection instruments (semi-structured interviews & document analysis)

Guidelines

With the data collection methods being rather reflective and unstructured the data collection instruments are flexible to allow adaptation within the data collection processes. It will therefore serve the purpose as reminders about the key matters that needs to be explored and covered through each of the data collection instruments. With the semi-structured interviews being more a form of natural conversation the key thoughts listed will allow for follow up open questions to enable eliciting ideas, opinions and probing thereof.

1.0 Introduction

- Express appreciation to candidate for participation and create a pleasant atmosphere for the interview
- Ask if candidate have any questions regarding the consent template and the process as contained in the cover letter
- Re-confirm approval for taping interview and transcript process

2.0 Field notes – reflective questions to guide the semi-structured interviews to obtain data on the key research questions and conceptual framework:

- 2.1 Why was the Training Programme for Educators and Trainers implemented in this Non-Profit Organisation?
- 2.2 What was the programme implementation process?
- 2.3 How did participants respond to the programme and what were their learning experiences?

Life factors:

- How did you become a first aid instructor?
 - *Purpose: easy question related to personal information on record and motivation for becoming an instructor*
- Why did you participate in the TPET development programme?
 - *Purpose: does participant understand the organisational/compliance context, implementation process and benefits in terms of personal development*

- *Probe:*
 - *What was your experience of the TPET programme?*
 - *What were the major factors that shaped this experience?*
 - *What was the most important learning on TPET?*
 - *What was least relevant of TPET?*
 - *Has the TPET programme influenced how you train? In what ways?*
 - *Has TPET influenced your sense of yourself as a trainer? In what ways.*
- What was your responsibilities at work, home and in your community during the TPET?
 - *Purpose: exploring possible barriers to learning*
- How did your responsibilities then influence your results?
 - *Purpose: how was barriers to learning managed*

Structural factors:

- What was your experiences regarding the following UNISA support services ie registration' learner support, contact sessions, technology, feedback on progress and other issues.
 - *Purpose: exploring possible barriers to learning*
- Did the support services (UNISA and St John) influenced your TPET results and how?
 - *Purpose: exploring learner support*

Learner inherent factors:

- How do your learning experiences of participating in the development programme compare with past learning experiences?
 - *Purpose: exploring learner experiences*
- What personal challenges did you have to overcome in your TPET studies?
 - *Purpose: exploring barriers to learning*
- How has your identity (the way you see yourself) been influenced by your course results?
 - *Purpose: exploring barriers to learning*
- What are your future career goals?
 - *Purpose: exploring learning experiences*

Participant Consent Form

MEd RESEARCH PROJECT INFORMATION LETTER/FOR PARTICIPANTS IN A CASE STUDY OF A TRAINING PROGRAMME FOR EDUCATORS AND TRAINERS WITHIN A NON-PROFIT ORGANISATION: PARTICIPANT AND ORGANISATIONAL EXPERIENCES

1. Study title and researcher details

- Department: School of Education/Adult education
 - Project title: A case study of a training programme for educators and trainers within a non-profit organisation: participant and organisational experiences
 - Principle investigator: Willie Louw 083 406 5007 willie.louw@stjohn.org.za
-

2. Invitation

You are hereby invited to participate in this education and training research project. To assist you in making your decision this information letter was prepared to give you an overview of the research process. It is important that you have a clear understanding for the reason of the research and what it consists off. Should you require more information please do not hesitate to contact me? You are also welcome to discuss your participation with other participants in the UNISA Training Programme for Educators and Trainers.

3. Purpose of study

The purpose of the study is to explore the UNISA training programme for educators and trainer's implementation process, evaluate the curriculum and explore the participating instructor's experiences of learning and the barriers to learning they have faced. Through this study it is intended to develop an in-depth understanding of participating instructor's experiences. The findings of this study could be used in future to develop appropriate support programmes for participants in this kind of learning programmes. It can also contribute to the programme development and implementation process of similar development programmes for instructors.

4. Reason for selection

You have been selected as you are a very good example of an instructor participating in the development programme as described and your experiences in participating in the programme can contribute to the findings and recommendations of this study.

5. Participation

You are under no obligation to participate in this research project and the decision to participate is totally yours. The enclosed consent form needs to be signed should you agree to participate in the research project. If you however decide to withdraw from the research project, you will be able to do so at any stage without giving an explanation. There will be no consequences should you decide to withdraw.

6. Requirements for participation

You will take part in two semi-structure interviews. The first interview will be an informal discussion about your learning journey and experiences while participating in the development programme. Based on the information provided by yourself I will write up your learning experiences and provide you with a transcript during the second

interview which you can read and confirm its accuracy. This interviewing process will take place from October 2016 to January 2017.

7. Confidentiality

You have a right to confidentiality and will therefore remain anonymous unless you request that your name must be used. A fictitious name will be used to ensure that you are not recognized within the research report. You will also have input in the final summary of your contribution to the report and have an opportunity to edit any part that you want excluded before it is published.

8. Results of the study

The completed research report will be submitted to the University of KwaZulu Natal for evaluation. The findings and recommendations of the study will be made available as a report to participant's and the study results will also be presented in a workshop format. The study and its results may also be presented at conferences and published in relevant journals.

9. Organizer of the research

I, Willie Louw, as a MEd student of the University of KwaZulu Natal

10. Study review

The University of KwaZulu Natal Research Ethics Committee

11. Contact details for more information

If you have concerns regarding the conduct of this research project, please contact:

Dr Vaughn John, Centre for Adult Education, University of KwaZulu-Natal, Education Building, Pietermaritzburg, E-mail: johnv@ukzn.ac.za or

HSSREC Research Office (Ms. P. Zimba, Tel: 031 260 3587, Email: ximbap@ukzn.ac.za)

Thank you

Name: ----- Date: -----

Consent template: *Please sign if you agree to participate in the study.*

Project Title	A case study of training programme for educators and trainers within a non-profit organisation: participant and organisational experiences											
Project Aim	To explore the programme implementation process, evaluate the curriculum and explore participant's experiences and barriers faced in learning											
Researcher	Willie Louw	083 406 5007	willie.louw@stjohn.org.za									
Supervisor	Dr Vaughn John	033 260 5069	johnv@ukzn.ac.za									
Participants	Adult individuals – First Aid Instructors											
<p>I have read and understood the information letter about this study. I agree to part to participate in this study by Willie Louw and understand that:</p> <ol style="list-style-type: none"> The information collected will be used for the researcher's Masters dissertation and may be presented at a conference and for publication in journals. My participation is voluntary and I have the right to withdraw from the study at any time of my choice. The data will be kept confidential and that I will remain anonymous in throughout the study and in the reports unless I ask to have my real name used in the reports. I have the discretion to allow the researcher access to other documents which he might find useful for the research purposes. Examples of such documents would be journals or diaries. If I need further information I can contact the researcher or his supervisor whose contact details have been included in the information letter. 												
<p>Declaration:</p> <p>I (Full name) hereby confirm that I understand the contents of this document and the nature of the research project and I agree to participate in the research project. I hereby provide consent to:</p> <table> <tr> <td>- Audio-record my interviews</td> <td>yes</td> <td>no</td> </tr> <tr> <td>- Video record my classroom instruction</td> <td>yes</td> <td>no</td> </tr> <tr> <td>- Use of my monitoring and course results for research purposes</td> <td>yes</td> <td>no</td> </tr> </table>				- Audio-record my interviews	yes	no	- Video record my classroom instruction	yes	no	- Use of my monitoring and course results for research purposes	yes	no
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<p>..... Signature of participant</p>		<p>..... Date</p>										