

Training Plan for EDP Training Course

Module number	Module name	Topic	NH	Class room	WPE	Informing principles/ information
1	Mod 01	Course overview			4	Overview of BESD intervention; information on the EDP course (the modules, sequence, workplace experience WPE, assessment requirements); setting of ground rules (both generic and provider-specific)
					4	EDP role (purpose and expectations) - mainly transfer of business skills using coaching as the main methodology (not business advisor), customising learning material and approach for individual EEs, verbal & written communication. Includes coaching, facilitation, IMS (database to record information and measure changes in EE business) and SNA (questionnaire to assess EE business knowledge & skills)
					8	Introduction to and overview of EE role (ie sales & marketing person, money manager, technical operator, employer, business planner). Use the business plan as a framework & describe the business areas in relation to the business plan. Give egs of work being done in business. Explain use of SNA (skills needs analysis) to determine strengths and weaknesses in EE's business knowledge & skills, and using this to inform coaching/ training.
16						
2	Mod 02	Entrepreneurial qualities			8	
					10	
					6	
24						
Mod05(a)	Mathematical & Financial Literacy	Mathematics for Business Application			16	
		Business Income and Expenditure			8	
		Data and Probability			16	
40						
					4	Use a portion of the time allocated to this module to further reinforce numeracy skills (provide examples, build into activities)
					6	
					8	
					8	
					32	

Mod 05(b)	Financial Management	Budgeting	20			
		Cash flow forecast	20			
		Funding	10			
		Establishing a basic bookkeeping system	32		Spend sufficient time on reinforcing EDP Learners' understanding of financial management issues	
		Monitor financial progress	18		Take EDP Learners beyond the basic requirements for achieving the L2 unit standard: use variety of exercises, case studies, to apply financial information	
		SNA for financial skills	2		Understand the technical content of the questionnaire and how it links to the course	
		Assignment: case studies specified for assessment purposes			An additional 3 days is allocated to further development of numerical literacy skills prior to the marketing module	
		160				
5	Mod 06	Coaching skills	Understand one-on-one coaching	8		Introduction to coaching & and its purpose, benefits and impact
			Understand coaching skills and tools	16		Learning styles and their impact. Coaching tools: creating a positive environment, communication (steps in successful communication, verbal & non-verbal communication, listening and asking questions), needs analysis, performance analysis, problem solving & decision making, giving & receiving feedback
			Apply coaching skills in the BESD context	40		The BESD coaching procedure: principles, initial meetings with EEs, materials for training/ coaching , planning & preparation, conducting training/ coaching sessions, dealing with issues affecting training/ coaching, conducting review and closure sessions, writing closure reports
			Support EE learning and application	24		Includes researching business sector knowledge; customising according to type of business and EE abilities; practical methods for supporting effective learning and application (Time allowed for provider input on research process, for EDP to research, write and present to/ discuss with group and provider; EDPs learn the process and will be able to apply it to research business sectors of subsequent EEs.)
			Maintain constructive coaching relationships	12		Soft skills for engaging with EEs = approaches, responding to needs, dealing with issues arising from the coaching relationship - includes both positive and negative factors
			Monitoring and evaluation	20		Concepts, importance and process of monitoring and evaluating EE learning and application; verifying EE learning and application
			Assignment (practical coaching) is included in time allocated to WPE			TP assess EDP Learners' practical coaching skills during WPE 5 & 6
		120				
		Discuss the meaning of facilitation	4			
		Identify and explain facilitation techniques	10		Includes creating powerpoint presentations	
		Identify and explain facilitation	10		Includes effective use of powerpoint slides	

7	Mod 08	Facilitation skills	Identify the key behaviours of an effective facilitator	8	EDPs learn to organise and facilitate learning events, workshops & meetings for 'EE community'	
			Use facilitation skills in the BESD context	4		
			Time allocation includes assignment			
			Assignment - in groups, EDPs plan, organise and facilitate a mini-workshop for WPE EEs on a topic of interest to EEs	48		12
9	Mod 09	Business opportunities	Identify business opportunities	8	Includes a field trip, ie to be prepared and facilitated by provider: In groups visit the local business community and explore and observe different business opportunities Links to business sector knowledge obtained during coaching module	
			Eliminate inappropriate ideas	8		
			Analyse and select viable business opportunities	16		
			Time allocation includes assignment/s	32		
		WPE (intro)	Initiate relationships with EEs and obtain profile & skills information	16	16	Visit 3 EEs over 2-day period Initiate relationships with EEs. Use questionnaire to obtain basic profile information & information on EEs skills related to marketing, sales, customer care
	Mod 05(a) Cont'd	Mathematical & Financial Literacy	Financial Literacy	16		
			Measurement	24	8	
10	Mod 11	Marketing, sales & customer care	Understand marketing terminology		4	Customer care additional to unit standard - emphasise concepts and practices
			The customer - Improving customer care		12	
			The Product/ service		10	
			Promotion (Communication mix)		14	
			Price - Preparing a quote		12	
			Distribution		10	
			Preparing a tender		8	
			Prepare and implement a marketing plan		24	

			SNA for marketing, sales and customer care			Understand the technical content of the questionnaire and how it links to the course
			Time allocation includes assignment/s	96	2	
		WPE 1	Workplace experience = coaching EE on marketing, sales and customer care skills	48	48	<p>o Days 1 & 2 = Preparation for coaching (EDP group & facilitator); o Follow topic outline in WPE Guide, plan & prepare for sessions; o develop/ customise notes/ templates/ learning aids for use with EEs.</p> <p>Days 3 - 6 include coaching and debriefing, planned so as to avoid scheduling coaching sessions with the same EE on consecutive days.</p> <p>o Day 3 - in field coaching 2 EEs; o Day 4 - half day in field coaching 1 EE + half day at provider for debriefing; o Day 5 - in field coaching 2 EEs; o Day 6 - half day in field coaching 1 EE + half day at provider for debriefing.</p> <p>Coaching time in field = EDP Learners individually, facilitator monitoring: o EDP sees 3 EEs twice each (ie 6 coaching sessions); o 1 - 2 hours daily contact time per EE; o rest of day = preparation for next coaching session; o project admin, record keeping; o transport to and from EEs; remaining time for EDP Learners' own work/ assignments.</p> <p>Debriefing & follow-up = EDP group & facilitator: o feedback, sharing experiences, resolving issues, etc; o structured to help EDP Learners identify and deal with problems/ identify and build on good practice.</p> <p>EDP Learners compile coaching notes and complete Coaching Session Summary.</p>
11	Mod 10	Business plan				Note: This is a 'chicken and egg' situation. The business plan requires understanding of HR and business operations, ie modules to be covered later in the course. But the business plan module provides important business information for understanding the enterprise areas. Where relevant, provisional plans should be compiled, which would then be reviewed and adjusted as the various modules are completed.
			Elements of a business plan		8	
			The summary description		8	
			The marketing plan		12	Time to be spent on reviewing the plan that was generated during the marketing & sales module and/ or generating another plan
			The operations plan		20	Includes an action plan – relate this to the business plan
			The staffing plan		8	EE unlikely to employ staff - use virtual information for plan
			The financial plan		18	Ensure EDP Learners relate financial management to the business plan
			Utilise business plan as tool to manage business performance		20	
			SNA for business planning skills		2	Understand the technical content of the questionnaire and how it links to the course
			Time allocation includes assignment/s	96		Assignments should be based on relevant EE conditions with addition of virtual data where EE information is insufficient

		WPE 2	Workplace experience = coaching EE on marketing, sales and customer care skills	48	48	<p>o Days 1 & 2 = Preparation for coaching (EDP group & facilitator); □ Follow topic outline in WPE Guide, plan & prepare for sessions; □ develop/ customise notes/ templates/ learning aids for use with EEs.</p> <p>Days 3 - 6 include coaching and debriefing, planned so as to avoid scheduling coaching sessions with the same EE on consecutive days.</p> <p>o Day 3 - in field coaching 2 EEs; o Day 4 - half day in field coaching 1 EE + half day at provider for debriefing; o Day 5 - in field coaching 2 EEs; o Day 6 - half day in field coaching 1 EE + half day at provider for debriefing.</p> <p>Coaching time in field = EDP Learners individually, facilitator monitoring: □ EDP sees 3 EEs twice each (ie 6 coaching sessions); □ 1 - 2 hours daily contact time per EE; □ rest of day = preparation for next coaching session; □ project admin, record keeping; □ transport to and from EEs; remaining time for EDP Learners' own work/ assignments.</p> <p>Debriefing & follow-up = EDP group & facilitator: □ feedback, sharing experiences, resolving issues, etc; □ structured to help EDP Learners identify and deal with problems/ identify and build on good practice.</p> <p>EDP Learners compile coaching notes and complete Coaching Session Summary.</p>
12	Mod 12	HR Management	The relationship between the employee and employer Employing staff Managing performance of employees SNA for HR management Time allocation includes assignment/s	32	14 8 8 2	Understand the technical content of the questionnaire and how it links to the course
13	Mod 13	HIV/AIDS	Define HIV/AIDS and the ways in which it is prevented and spread Understand the impact of STIs on HIV Explain how HIV/AIDS affects communities Explain societal and workplace rights of people infected with HIV Time allocation includes assignment/s	16	4 4 4 4	

		WPE 3	Workplace experience = coaching EE on marketing, sales and customer care skills	48	48	<p>o Days 1 & 2 = Preparation for coaching (EDP group & facilitator); □ Follow topic outline in WPE Guide, plan & prepare for sessions; □ develop/ customise notes/ templates/ learning aids for use with EEs.</p> <p>Days 3 - 6 include coaching and debriefing, planned so as to avoid scheduling coaching sessions with the same EE on consecutive days.</p> <p>o Day 3 - in field coaching 2 EEs; o Day 4 - half day in field coaching 1 EE + half day at provider for debriefing; o Day 5 - in field coaching 2 EEs; o Day 6 - half day in field coaching 1 EE + half day at provider for debriefing.</p> <p>Coaching time in field = EDP Learners individually, facilitator monitoring: □ EDP sees 3 EEs twice each (ie 6 coaching sessions); □ 1 - 2 hours daily contact time per EE; □ rest of day = preparation for next coaching session; □ project admin, record keeping; □ transport to and from EEs; remaining time for EDP Learners' own work/ assignments.</p> <p>Debriefing & follow-up = EDP group & facilitator: □ feedback, sharing experiences, resolving issues, etc; □ structured to help EDP Learners identify and deal with problems/ identify and build on good practice.</p> <p>EDP Learners compile coaching notes and complete Coaching Session Summary.</p>
14	Mod 14	Safety, health and the environment	<p>Safety awareness within the informal/ small business sector</p> <p>Safety, health and environmental risk analysis</p> <p>Safety rules in the workplace</p> <p>Crime prevention</p> <p>Health/ hygiene and environmental requirements in the workplace.</p> <p>Good housekeeping practices within the informal/ small business sector</p> <p>Use and apply PPE/ PPC in a workplace</p> <p>Safety signs and colours</p> <p>Basic emergency procedures and first aid</p> <p>Time allocated for assignment/s (access to EE workplace required)</p>	40	6 4 6 4 6 4 4 2 4	<p>The EDP Learner is given a broad overview - should know the basics for a broad range of business contexts</p> <p>Some parts of this module must be printed in colour (ie safety signs, etc)</p> <p>Assignments relate to the EE workplace. A portion of time to be spent on-site collecting information, the remainder doing the assignments.</p>

		WPE 4	Workplace experience = coaching EE on marketing, sales and customer care skills	48	48	<p>o Days 1 & 2 = Preparation for coaching (EDP group & facilitator); □ Follow topic outline in WPE Guide, plan & prepare for sessions; □ develop/ customise notes/ templates/ learning aids for use with EEs.</p> <p>Days 3 - 6 include coaching and debriefing, planned so as to avoid scheduling coaching sessions with the same EE on consecutive days.</p> <p>o Day 3 - in field coaching 2 EEs; o Day 4 - half day in field coaching 1 EE + half day at provider for debriefing; o Day 5 - in field coaching 2 EEs; o Day 6 - half day in field coaching 1 EE + half day at provider for debriefing.</p> <p>Coaching time in field = EDP Learners individually, facilitator monitoring: □ EDP sees 3 EEs twice each (ie 6 coaching sessions); □ 1 - 2 hours daily contact time per EE; □ rest of day = preparation for next coaching session; □ project admin, record keeping; □ transport to and from EEs; remaining time for EDP Learners' own work/ assignments.</p> <p>Debriefing & follow-up = EDP group & facilitator: □ feedback, sharing experiences, resolving issues, etc; □ structured to help EDP Learners identify and deal with problems/ identify and build on good practice.</p> <p>EDP Learners compile coaching notes and complete Coaching Session Summary.</p>
15	Mod 15	Business operations	<p>Monitor productivity in a business venture</p> <p>Implement a basic quality system in a new venture</p> <p>Mobilise resources for a new venture</p> <p>Implement an action plan for business operations (ie operationalising the plan)</p> <p>SNA for business operations</p> <p>Time allocation includes assignment/s</p>	80	<p>24</p> <p>24</p> <p>8</p> <p>22</p> <p>2</p>	<p>EDP Learners develop and 'operationalise' an action plan (ie there is no actual 'implementation')</p> <p>Understand the technical content of the questionnaire and how it links to the course</p> <p>Note: time allocated is less than for the unit standard; however, 'implementing' a plan has already been covered, so this will be familiar to EDP learners.</p>
		WPE 5	Workplace experience = coaching EE on marketing, sales and customer care skills	56	56	<p>Structured as for WPE 1 - 4 but more flexible regarding time in order to allow sufficient time for assessment of EDP Learners by TP.</p> <p>□ EDP Learners complete coaching closure procedure with EEs</p> <p>o TP conducts summative assessment of EDP Learners' coaching skills during WPE 5 & 6.</p>
			<p>Understanding networking</p> <p>Linkage between networking and access to resources</p>		<p>8</p> <p>12</p>	<p>Dual purpose: for the EDP & for the EE</p> <p>When, for what purpose and how to use support for EEs & resources available. Includes understanding the 'enabling environment'- local & national/ public & private /commercial, etc</p>

16	Mod 16	Networking	Use suitable methods to establish, maintain and grow networks			EDP's own job role, to further EDPs own development, to sustain and develop emerging enterprises (ie providing support - but not networking on behalf of the EE)
			Time allocation includes assignment/s	32	12	
		WPE 6	Workplace experience = coaching EE on marketing, sales and customer care skills	56	56	Time allocation as per WPE 5 - ie structured as per WPE 1 - 4, but with 1 additional day to accommodate assessment of EDP Learners by TP <ul style="list-style-type: none"> o EDP Learners complete coaching closure procedure with EEs o TP conducts summative assessment of EDP Learners' coaching skills during WPE 5 & 6.
			Total	1176	844	332

147 days

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Training Plan for EDP Training Course

Use training plan as basis for the Training Provider's training schedule

Training providers should add the following to this generic training plan to create their own training schedules:

- o The starting and ending dates for each module/ WPE block
- o The name and cellphone number of the Facilitator for each module / Mentor for each WPE block

If any changes are made, the Provider is required to send the revised schedule to **XXXXXXXXXXXX**

Additional information - Modules, sequencing, approach

Introduction / Course overview - if this is covered in less time than the 2 days allocated, go on to the next module, ie Entrepreneurial Qualities

The purpose is to provide EDP Learners with a context for the learning they will be engaging in

Mathematical and financial literacy - experience has shown that numerical skills are generally poor. 5 days are allocated for building understanding before the start of the module for Financial Management.

A further 3 days are allocated for mathematical and financial literacy before the Marketing Module. It is recommended that this be followed with further regular opportunities to practice calculations - ie the Training provider would set daily exercises for EDP learners to do in their own time.

The TP needs to monitor that exercises are being done - ie each day checking a different EDP Learner's work at random, and giving feedback to the group on the results of the calculations

Writing skills - it is recommended that EDP Learners complete writing tasks on a daily basis to improve their writing ability (to be discussed at the orientation workshop)

The TP needs to monitor that the EDPs are doing the practice tasks as required (ie by checking on individual EDP Learners on a random basis)

The Workplace Experience component

Workplace experience (WPE) in this course refers to EDP Learners obtaining actual experience of **coaching** EEs at the EEs' premises (in business skills)

It does not refer to application by the EDP Learner of enterprise related skills in the EE's business

WPE entails the EDP Learners obtaining coaching experience with 3 EEs per EDP Learner

Workplace Experience takes place at the premises of the identified EEs

Selection and identification of WPE EEs for EDP learners; TP is required to have a plan showing how EDP WPE identification is supported

EDP Learner to identify 3 EEs in a manageable distance of their place of residence and the TP's premises - TP to verify

Criteria for EE WPE selection include at least 12 months in business; RSA citizen; EE has time to avail for WPE, mother tongue literacy, operational & economic activity

Where EDP learners have identified family, friends or have been regular customers at the EE, the EE should be allocated to another learner for WPE

TP to draw up std. invitation letter for EDPs to invite EEs to information session (1-2 hours) on WPE

TP to conduct information session; TP, EDP and EE to sign agreement for WPE

Initial visit to EE

Initiate coaching relationship and obtain information on EE business profile and skills (SNA for marketing, sales and customer care)
EDP learner visits 3 EEs over 2 day period

WPE for coaching of business skills (ie coaching EE in marketing, sales and customer care)

Consists of 6 'blocks' of consecutive days: WPE 1 - 4 = 6 days; WPE 5 & 6 = 7 days

WPE 1 - 4 = 6 days

o Day 1 & 2 = Preparation for coaching (EDP group & facilitator); □ use WPE guides to plan interventions; □ develop handouts/ templates/ learning aids for use with EE
Days 3 - 6 include coaching and debriefing, planned so as to avoid scheduling coaching sessions with the same EE on consecutive days:

o Day 3 - in field coaching 2 EEs

o Day 4 - half day in field coaching 1 EE + half day at provider for debriefing

o Day 5 - in field coaching 2 EEs

o Day 6 - half day in field coaching 1 EE + half day at provider for debriefing

Coaching time in field = EDPs individually, facilitator monitoring:

□ EDP sees 3 EEs twice each (ie 6 coaching interventions);

□ 2 hours daily contact time per EE

□ rest of day = preparation for next coaching session; □ project admin, record keeping; □ transport to and from EEs ; remaining time for EDPs own work/ assignments

Debriefing & follow-up = EDP group & facilitator:

□ feedback, sharing experiences, resolving issues, etc

□ structured to help EDPs identify and deal with problems / identify and build on good practice

WPE 5 = 7days

o Structured as for WPE 1 - 4 but more flexible regarding time, in order to allow sufficient time for assessment

o Incorporates assessment by EDP learner of EEs' learning and application

□ Assessment to be on basic level using supplied observation checklist

o TP assessment of EDP Learners' coaching skills takes place during WPE 5 & 6 - mainly WPE 6 to allow more time for practice and building confidence

□ If necessary cut down on time allocated for preparation and debriefing to accommodate TP assessment of EDP learners

WPE 6 = 7 days

Time allocation as per WPE 5

The TP completes the assessment of EDP Learners' coaching skills

The EDP Learners complete the assessment of EE learning and application

EDP Documents for planning, managing and recording coaching sessions:

Coaching session form - a one-page condensed version for planning and recording coaching information per session

WPE guidelines - provides guidance on the content of the coaching sessions

Coaching plan - shows dates, times and content of planned coaching sessions for each EDP Learner. Should be kept updated.

Attendance register - to be signed by EE and EDP at each session

Self-evaluation form to be completed by EDP

Allocation of time/ planning for the EDP Learners Workplace Experience at the premises of the identified EEs

Each WPE day comprises 8 hours

Contact time with each EE per visit = approximately 2 hours. 2 coaching sessions per EE per WPE = 6 coaching sessions per EDP per WPE.

Balance of 'WPE' day is allocated to transport to and from EE, preparation for coaching, project admin, EDPs own assignment/s

Preparation for coaching' refers to preparing a handout by customising notes for EEs, and preparing templates and any learning aids required

Preparation also includes reflecting and building on experience of previous session, preparing coaching plan (completing coaching session form)

Project admin' refers to completing monitoring forms for record keeping purposes, recording information for TP, collecting POE material on coaching, completing coaching information, etc

Three EEs per WPE will allow time for diverse reflection, enable the EDP learner to engage more thoroughly with issues across sectors relating to skill transfer.

Sharing information on their experiences will enable EDPs to broaden their awareness & understanding

Assessment of EDP Learners' coaching skills

The TP will observe each EDP conduct a coaching session during WPE 5 - 6

After the last WPE each EDP Learner is required to compile a report on his/ her experiences - for submission to the training provider.

This should take the form of a simple report with annexures (ie a selection of completed coaching session forms and self-evaluation forms)

Attendance register - proof of training days

The attendance register (signed by EE and EDP Learner at each session) will act as proof of training for payment purposes when the EDP is not at the provider's premises.

WPE for EDP skills (ie facilitation, assessment)

WPE for Facilitation skills reflects the requirements for the 'Business Club' (monthly EE workshops for information sharing and peer learning).

- The WPE consists of the EDP learners planning and organising mini-workshops for EE, ie inviting a speaker and facilitating workshop and learning activities.
 - o Time (16 hours) is allocated – this should be spread out as required over the remainder of the course, after completion of the Facilitation Module.
 - o Possible topics eg funding, bank accounts, community safety, supplier support for marketing, etc

The Training Provider conducts assessment of EDP Learners' facilitation skills at these mini-workshops

TPs mentorship of WPE: The TP is required to draw up a plan showing how the support for the EDP learners WPE is to be organised

The TP mentor should make one site visit per EDP Learner per WPE block, to observe the EDP learner engaged in coaching the EE

Note: The need for and purpose of the TP mentor visits should be made clear to the EE during the EE selection phase

TP visits during WPE 1 - 4 focus on support for the EDP.

The summative assessment of the EDP Learners' coaching skills will be conducted during WPE blocks 5 and 6

Training Providers are required to draw up a schedule for WPE showing how they plan to mentor the EDP Learners and manage their activities during WPE, and when assessment

will be done. Documents which harmonise with the schedule need to be signed by the TP and EE, verifying each EE visit.

Importance of WPE

Note: it is important for the TP to recognise the significance of WPE, and that sufficient time needs to be committed to its preparation, implementation and management

Note - the transfer of skills through coaching is a means to an end - if learning takes place, growth will happen in the business

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